







WHAT YOU WILL DISCOVER

- » How do you start out on the right foot with your clients?
- » How do you navigate and guide client expectations?
- » How do you deal with difficult clients?

Start right for Client Success

MODULE 6

Steps to Success

Key Deliverables

Time & Money

Contracts and Agreements

Ideas & Strategies

Ideas & Strategies 10



A green lightbulb icon with a small curved line inside, symbolizing an idea or strategy.

Contracts and Agreements 11



A blue icon of a document with a pen, symbolizing contracts and agreements.

Time & Money 12



A teal icon featuring a dollar sign and a clock, symbolizing time and money.

Key Deliverables



13

14

MODULE 6

Navigating Client Expectations

Discovery



15

Organization Documents



16

Program Documents



17


Communications Technology



18

18

Establish Tasks & Limits



A slide with a white background and a green footer bar. The title "Establish Tasks & Limits" is in purple. Below the title are three orange icons: a clipboard with a checklist, a circular flow diagram with two people, and a calendar.

19



A slide with a white background and a green footer bar. The icon shows two blue silhouettes of people, one larger than the other, with a speech bubble above the smaller one.

21

MODULE 5

Firing Bad Clients

A slide with a green background and a white border. The title "Firing Bad Clients" is in white. In the top right corner, there is a small white box with the text "MODULE 5" and a green ribbon graphic.

IDENTIFY NO-FIT CLIENTS 22



Professional Assessment



Assignments



Quality Referrals




Boundaries

Professional Assessment 23



Assignments 24



Quality Referrals



23

Boundaries



24



25



