CLIENT COMMUNICATION TEMPLATES

Client-facing language for the moments when you step back from a touchpoint. The framing rule across every template: this is a trust transfer, not a handoff. Introduce experts, never assistants. Never apologize for the change — clients take their cue entirely from your tone, and an apology teaches them to hear demotion. These are written warm and premium; adjust the words to your voice, keep the spine.

TEMPLATE 1: INTRODUCING A TEAM MEMBER AS THE EXPERT

Send before the transition, personally, to each affected client. The four load-bearing pieces: the credential, a specific proof moment they authored, the direct benefit to the client, and your visible admiration.

TEMPLATE

Subject: Someone I want you to meet

TEMPLATE

[Client name] — I want to introduce you to someone before our next call, and honestly, this is overdue.

TEMPLATE

[Team member] leads [function] here, and she has been the architect behind your [project/account] since month one — the [specific piece of work the client loved] was her design. She's deeper in your account's day-to-day than I am at this point, which means when you ask her something, you're getting the answer from the source instead of waiting for me to track it down.

TEMPLATE

She's joining our next call to walk you through [what's coming]. You're going to see very quickly why she's the best thing about this company.

THE SPECIFIC PROOF MOMENT FOR EACH CLIENT TRANSITION (ONE LINE PER CLIENT):

TEMPLATE 2: THE TRANSITION EMAIL

Send when the day-to-day officially moves. Note what it does not contain: an apology, or the word "unfortunately."

TEMPLATE

Subject: An upgrade to how your account runs

TEMPLATE

[Client name] — I'm making a change on your account that I'm genuinely excited about.

TEMPLATE

Starting [date], [team member] leads your [calls/day-to-day/delivery]. You've already seen her work — [specific result] — and she catches things in hours that would sit in my inbox for days.

TEMPLATE

I'm not going anywhere. I review every account monthly, I'm one email away, and you'll still see me at [the touchpoint you're keeping]. What's changing is that your day-to-day now gets the person closest to it, which means faster answers and nothing waiting on my calendar.

TEMPLATE

[Team member] will reach out this week to set up [first touchpoint]. You're in excellent hands — better than mine for this, and I don't say that lightly.

TEMPLATE 3: RESPONDING TO "CAN I JUST WORK WITH YOU?"

At least one client will ask, kindly. Do not improvise this answer — improvised answers cave. Warmth, a no that doesn't sound like a no, the reason framed entirely in their interest, and a check-in date you intend to keep.

> **TEMPLATE**
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> *"I love that — and I'm not going anywhere. I see your account's numbers every month and I'm always one email away. But I'd be doing you a disservice keeping your day-to-day on my calendar. [Team member] lives in your account; I visit it. She catches things faster than I do, and she doesn't have my inbox in her way.*

> **TEMPLATE**
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> *Give it sixty days. If you don't feel better taken care of than before — not equally, better — call me and we'll rethink it. Fair?"*

OUR SIXTY-DAY CHECK-IN DATES PER TRANSITIONED CLIENT:

TEMPLATE 4: SETTING THE NEW COMMUNICATION CHANNEL

Moving the person without moving the channel doesn't work — if clients keep texting your cell, the wiring is still yours. Send with, or right after, the transition email.

> **TEMPLATE**
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> *One logistical note that will make your life easier: for anything about your account, the fastest route is now [channel/address] — that reaches [team member] directly, and you'll have an answer within [response window]. It's genuinely quicker than catching me between meetings.*

> **TEMPLATE**
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> *For anything you specifically want my eyes on, I'm still at [your address] — that doesn't change.*

When the text arrives on your phone anyway: reply once, warmly, from the new channel, with the owner looped in. Clients learn routing the same way teams do — from where the answers actually come from.

> **TEMPLATE**
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> *"Great question — moving this to [channel] so [team member] can get you a real answer today instead of waiting on my travel schedule. She's got it from here."*

TEMPLATE 5: WHEN A TRANSITIONED CLIENT REACHES PAST THE TEAM

The little test, usually unconscious: is the old hotline still live? Acknowledge warmly, loop the owner into the same thread, and let her resolution be the last word the client reads.

> **TEMPLATE**
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> *"So glad you flagged this. Looping in [team member] — she'll have this sorted today, and she knows the context better than I do at this point. [Team member], over to you."*

If the wobble revealed a real gap in the team member's package, fix it in private. The client never needs to see the machinery — they just need to see it work.

TONE RULES FOR ALL CLIENT COMMUNICATION

- Never "someone from my team." Always a name, a role, and a credential.
- Never "unfortunately" or "I know this isn't ideal." The change is an upgrade; write like it.
- Specifics carry the trust: name the work they've already benefited from that your team member produced.
- Stay visibly in the frame at first — monthly review, quarterly call — and shrink your cameo on the evidence, not on a promise.

THE TOUCHPOINT I'M KEEPING WITH EVERY CLIENT, SO "I'M STILL HERE" STAYS TRUE:

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