



Client Communication SOP

myVA Way

1. Schedule WEEKLY Check-In Meetings
2. Send a Recurring Meeting Invite
3. Attach a Standing Agenda
4. Take Notes During the Meeting
5. End Meeting with Tasks + Deadlines for everyone
6. Follow-up Meeting with Messaging
7. Add Tasks + Deadlines to Project Management Software
8. Send a Weekly Recap Email to proACTively Communicate Expectations

EXAMPLE: Client Check-In Agenda

May 21, 2024 | Emily / Sarah

1. Schedule WEEKLY Check-In Meetings

- 1.1 Meeting duration: 15 mins; 30 mins; 45 mins; 60 mins

2. Send a Recurring Meeting Invite



3. Attach a Standing Agenda

3.1 Google Calendar → New Google Doc → Select “Meeting Notes”

3.2 EXAMPLE:

- 5 minutes: Connect as Humans
- 5 minutes: What did you do last week?
- 5 minutes: What are you working on this week?
- 5 minutes: What’s holding you back from being successful? What other input or information do you need to move your project(s) forward?
- 5 Minutes: Next Steps + Tasks + Deadlines

4. Take Notes During the Meeting

4.1 Add notes directly into your agenda document

4.2 Record the meeting with Fathom (optional)

5. End Meeting with Tasks + Deadlines for Everyone

6. Follow-up Meeting with Messaging

6.1 Email with Tasks + Deadline

6.2 Clarify Differences ProACTively



7. Add Tasks + Deadlines to Project Management Software

7.1 Monday + ClickUp + Notion


7.2 Either for your own tracking or team tracking

8. Send a Weekly Recap Email to proACTively Communicate Expectations

8.1 Recap status of week's projects

8.2 Use bullet points and icons –    – for speed and clarity

EXAMPLE: Client Check-In Agenda


May 21, 2024 |  Emily / Sarah





Attendees:

Emily Elsner Twesme




Sarah Hardy

Attached files:

 Notes - Emily / Sarah

CONTENT EXAMPLE	TIME ESTIMATE
Notes	
<ul style="list-style-type: none">• How was your re-entry after your trip?	(5 minutes)
<ul style="list-style-type: none">• Updates from last week:<ul style="list-style-type: none">◦  Communication guide draft◦  Scheduled July team member evaluations	(3-5 minutes)
<ul style="list-style-type: none">• Working on:<ul style="list-style-type: none">◦  Drafting conference agenda◦  Scheduling August travel	(5 minutes)
<ul style="list-style-type: none">• Discussion Items:<ul style="list-style-type: none">◦ Travel preferences for August<ul style="list-style-type: none">■ Hotel options■ Air travel options	(5-10 minutes)
Action Items (tasks + deadlines)	(5 minutes)
<div><input type="checkbox"/></div>	

Example: Weekly Client Communication

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
Work on tasks; check in as needed	Weekly check-in meeting During meeting, take notes for TASKS + DEADLINES	Work on tasks; check in as needed	Work on tasks; check in as needed	SEND Friday email <ul style="list-style-type: none"> • To client, CC your OS • GIVE UPDATES: Completed? Working on? Hours? • ATTACH next week's agenda
	SEND follow-up email after meeting: <ul style="list-style-type: none"> • Attach notes; • Call attention to any tasks your Client need to complete 		START agenda for next week's check-in meeting	Clients are BUSY; use bullet points and icons when possible: <ul style="list-style-type: none"> •  Things I've done •  Things still in progress •  Things paused or stuck
	ADD tasks + deadlines to project management software (or other tracking system)			