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Client Communication SOP

myVA Way

1. Schedule WEEKLY Check-In Meetings

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

2. Send a Recurring Meeting Invite

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3. Attach a Standing Agenda

3.1 Google Calendar → New Google Doc → Select "Meeting Notes"

3.2 EXAMPLE
- 5 mins: Connect as Humans
- 5 mins: What did you do last week?
- 5 mins: What are you working on this week?
- 5 mins: What's holding you back from being successful? What other input or information do you need to move your project(s) forward?
- 5 mins: 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
- How was your re-entry after your trip?   (5 minutes)

- Updates from last week: (3-5 minutes)
  - ✅Communication guide draft
  - ✅Scheduled July team member evaluations

- Working on: (5 minutes)
  - 🚧Drafting conference agenda
  - 🛑Scheduling August travel

- Discussion Items: (5-10 minutes)
  - Travel preferences for August
    - Hotel options
    - Air travel options

Action Items (tasks + deadlines)   (5 minutes)
- ☐

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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** • To client, CC your OS • **GIVE UPDATES:** Completed? Working on? Hours? • **ATTACH next week's agenda**
	SEND follow-up email after meeting: • **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: • ✅Things I've done • 🚧Things still in progress • 🛑Things paused or stuck
	ADD tasks + deadlines to project management software (or other tracking system)			