

# Client Engagement Process

How we work with clients – from first contact to delivery

**Prepared by:** Chartered Consultants

Internal reference document

**Applies to:** All new and existing clients

## Two Essential Documents

There are two core documents used in every client engagement:

Document	Purpose	Nature
<b>Retainer Agreement</b>	Ongoing support & availability	Fixed – applies to any client
<b>Scope of Work (SOW)</b>	Specific project deliverables	Bespoke – negotiable

Retainer	Scope of Work
<ul style="list-style-type: none"> <li>Client pays a fixed monthly amount to “retain” you</li> <li>You stay available – provide support, guidance, answer questions</li> <li>Like Terms &amp; Conditions: no negotiation, just Yes or No</li> </ul>	<ul style="list-style-type: none"> <li>Specific to one project or client</li> <li>Can be discussed and adjusted</li> <li>A contract that can be modified</li> </ul>

## Engagement Process

The key principle: always send the SOW *before* quoting a price.

Step	Action
1	Meet the client – listen, discuss their needs, show portfolio
2	Write the Scope of Work internally
3	Send SOW to client <b>1-3 days before</b> any meeting
4	Client reviews – discuss feedback and adjust if needed
5	Once agreed – quote the price
6	Client accepts - send invoice or retainer agreement
7	Payment received - begin work

If adjustments are needed: discuss and revise the SOW, then repeat from step 4.

## Why Send the SOW Before Quoting Price?

### Wrong approach

1. Meet client
2. Quote price immediately
3. Client thinks: "They misunderstood me"
4. Lost deal

### Right approach

1. Meet client
2. Send SOW first
3. Client thinks: "They understand me 100%"
4. Quote price
5. Smooth agreement & trust

### Benefits of sending SOW first:

Benefit	Why it matters
Client knows you understand them	"We are 100% on the same page"
Avoid misunderstandings	Client can say "don't need this" or "add this"
Professional credibility	Builds trust before money is discussed
Fair pricing	Client understands the price comes with a defined scope

## The Ideal Client Relationship

The best outcome is to have both a Retainer and one or more Scopes of Work running with the same client.

Client	Chartered Consultants
Retainer – £200/month	Ongoing support
Project A – SOW #1	Deliver Project A
Project B – SOW #2	Deliver Project B

- **Retainer:** stay around, provide continuous support and guidance
- **SOW:** scoped and priced for each specific project

## Practical Tips

Situation	Action
Meeting in person	Send SOW 1-3 days before so client can review
Client has feedback	Discuss in the meeting – don't hand over a pre-printed final version
Standard ongoing work	Use the Retainer Agreement template
Bespoke project	Write a custom Scope of Work

## Document Types

### Non-Negotiable

- **Terms & Conditions** – Yes or No only
- **Retainer Agreement** – standard template, no changes

### Negotiable

- **Scope of Work** – can be adjusted per client
- **Contract** – can be discussed and modified

## Key Takeaways

#	Takeaway
1	The Retainer is your “bare minimum” – this is what working with you looks like
2	The Scope of Work is project-specific and can be negotiated
3	Always confirm understanding <b>before</b> discussing money
4	When both parties are on the same page, pricing becomes smooth
5	Send the SOW 1-3 days ahead – gives the client time to review
6	Professional documentation creates trust and credibility

*“These are the most essential things. They can change the entire way you do business.”*