

JUST SAY NO: WHY, WHEN & HOW TO SAY NO TO CLIENTS



Why Do We Say No To Clients?

Create healthy and helpful boundaries for you and your team.

We say no to create boundaries. As professionals, we tend to inadvertently create work environments where chaos thrives because we want to help our clients/customers. Unfortunately, we end up on a hamster wheel, constantly saying, "yes," to everyone around us and burning out. If you're still running on that hamster wheel, you're not giving your best to your clients, team, loved ones, or most importantly, yourself.

The truth is you can still go above and beyond for your clients/customers while implementing healthy boundaries. Boundaries allow you to commit to work-life balance and provide the best services and products for your clients without burning out.

If you have a team, whether it's one employee or ten contractors, boundaries will raise morale, increase quality of work and productivity. What does that mean? A happier team means more creativity, more loyalty and an increase in the bottom line. There is no downside to creating healthy and helpful boundaries around the work you do.



**What you don't do determines
what you can do.**

Tim Ferriss, Entrepreneur & Best-selling Author

When Do We Say No To Clients?

1. When we can't meet deadlines or would have to work outside of business hours

We say no to clients when we don't have the capacity to fulfill a request within the timeframe they've asked. Perhaps you have other deadlines, or you're being asked to rush a request. Maybe you do have the time if you work after hours, so you decide to charge a fee to make it worthwhile. This is a good option when you have a client who consistently asks for things last minute or after hours. You decide when you're willing to work on your personal time, and charge them to do so.

2. When we're asked for a service or product we don't offer

We also say no to clients when we're asked for a service or product we don't offer and it's outside of our Zone of Genius or Desire Zone (See the Resources page of this doc for more info). If it's a project we aren't passionate about and wildly proficient at, we decline the opportunity. We do this because providing services and products that we don't enjoy, or aren't good at, frustrates us and slows down the progress of our clients.

3. When we are asked for our services for free or steeply discounted

We decline an opportunity when we are asked to do it for free or at a steep discount. If you choose to offer free services as a one-off or as part of a lead generation campaign, or partnership that's your call. However, you should not be awkwardly bullied into helping someone else make money whilst they ask you not to make money.

4. When you don't (or no longer want) to work with the person or business

Finally, if you realize the lead is not a good fit to work with you, decline the opportunity. There are few things that will wear you and your team out faster than working with a client whose personality or values do not complement yours.

Zone of Genius

What do you do better than others? What are you best and proficient at? What's your super power?

Desire Zone

What are you passionate about, highly-proficient at and provide the most value doing?

How Do We Say No To Clients

Prepare now for Nos that will come later.

Saying no isn't always easy. Often times people feel a bit awkward when they decline an opportunity or to fulfill a request made by someone, especially if it's a current client or a family member. That's why preparation is key!

Take these steps to prepare for your Nos:

1. Categorize who and what you'll decline.
 - a. Ex Who: Current clients, leads, referrals, family members, friends, acquaintances.
 - b. Ex What: A new project, project scope creep, working after hours, working for free
2. If you plan to offer discounted service prices for certain categories, come up with those now.
3. Create script templates for these circumstances and put them in an organized and easily accessible folder to use later.
4. Anticipate the services you won't offer and deepen your network. Find quality providers to recommend your Nos to.

Sample Script Templates

Over the next couple of pages, you'll find samples of script templates to work from. We encourage you to tweak them; make them your own.

For example, if you sell products, swap out the word services. If you have a team, acknowledge them in your scripts as applicable.

As you tweak these, remember to be kind, but assertive, and always try to provide referrals. Remember to leave the option open to work with you within your boundaries, but don't be afraid to just decline the option if it's not a good fit.

Script Template

A script you can use over and over with minor tweaks. Something you can reuse to save time and maintain consistency.

How Do We Say No To Clients

When You Don't Have The Capacity

Unfortunately, I cannot commit to this and meet my current deadlines for other clients. If your timeframe is flexible, I would be happy to add this to my list to complete by 'insert your reasonable timeframe'. Let me know if that works for you!

When You're Open to Work Outside of Normal Hours

Unfortunately, to make this happen I would have to work outside of my standard hours. Occasionally, under special circumstances, I do work during what is normally my personal time. The fee for this is 'insert your after hours/rush rate'. If you'd still like to have this done by 'insert their deadline', I'll be happy to send over an invoice and get this started. Let me know by 'timeframe to give you ample time to complete the project' so I have sufficient time to finish this by your deadline.

Remember, you can choose to work on the project after receiving payment or beforehand. Just be sure to let your client know that upfront. Be as clear as possible.

When a Clients or Lead Wants Your Service for Free

I'm thrilled about the possibility to work with you. Unfortunately, I'm not taking on unpaid projects at this time. If your situation changes in the future, please let me know. In the meantime, let's connect on social and keep in touch!

You can also refer the person to your free resources on the topic such as blogs, videos or free guides.

When Someone Wants to Pick Your Brain

Thank you for thinking of me! I'm happy to be a resource for you. As a service provider in this field, I typically charge for this type of advice. I would love to get you on the calendar for a consult so we can dig into what's going on, find some clarity and work on next steps. Here's my link!

Remember, you can also refer this person to your free resources either in this message or a follow-up message.

How Do We Say No To Clients

The templates above are important and you may need to make several versions of them.

The truth is, the more value you bring to people, the more likely your friends, family and acquaintances will ask you to give them the friends and family discount (read: FREE or very steeply discounted). Create scripts for each scenario you imagine will happen.

When You Need To Decline a Service/Product Request

Initial Request Response:

While I would love to help you with this worthwhile initiative, it's not within the scope of my services 'or products'. To ensure you get the best quality 'service or product they asked for' in a timely manner, hiring an expert in this area would be more appropriate.

'Referral 1' or 'Referral 2' are both trusted resources for this type of work. I would be happy to make an introduction if you'd like. Let me know!

Response If They Insist You Do It:

I appreciate the vote of confidence. The reason I'm so good at what I do is because I don't spend my time doing things that I'm not passionate about or best at. This gives me time to hone my craft for clients like you! My schedule simply doesn't allow me to refine skills for services or products I don't offer.

Let me know if you'd like the contact information for my colleagues who do provide this service 'or product'.



**Freedom isn't the ability to say
yes. It's the ability to say no.**

Rajneesh, Philosopher

△ RESOURCES



Want to dig into some of the concepts we've discussed in this doc? We sourced a few options to get you started. Check out the links below!

Zone of Genius


- Read [The Big Leap](#)
- Check out this [article](#) to learn more about an exercise to apply it to your career!

Desire Zone

- Read [Free to Focus](#)
- Check out this [video](#) to hear the author discuss the book. (Gets to it at 10m45s)

JENN RIVERA

Founder & CEO



Jenn Rivera is the founder of Ascender Consulting where she works with business leaders to crush operational bottlenecks, build relationships with their most important stakeholders and develop communication strategies to achieve business goals.

Prior to starting her business, Jenn became an award-winning business developer, program manager and video producer. She's experienced in new program development, spearheading industry-leading programs comprised of up to 200 employees, and coaching leaders in grass-roots marketing and critical relationship building.

Her formal education includes a Bachelor of Science in International Business & Management from the University of Tampa and a Master's in Communication from Johns Hopkins University.

Most recently, Jenn launched XMZ Society, an educational and professional networking group that champions Gen X-ers, Millennials and Gen Z-ers looking to advance their careers.

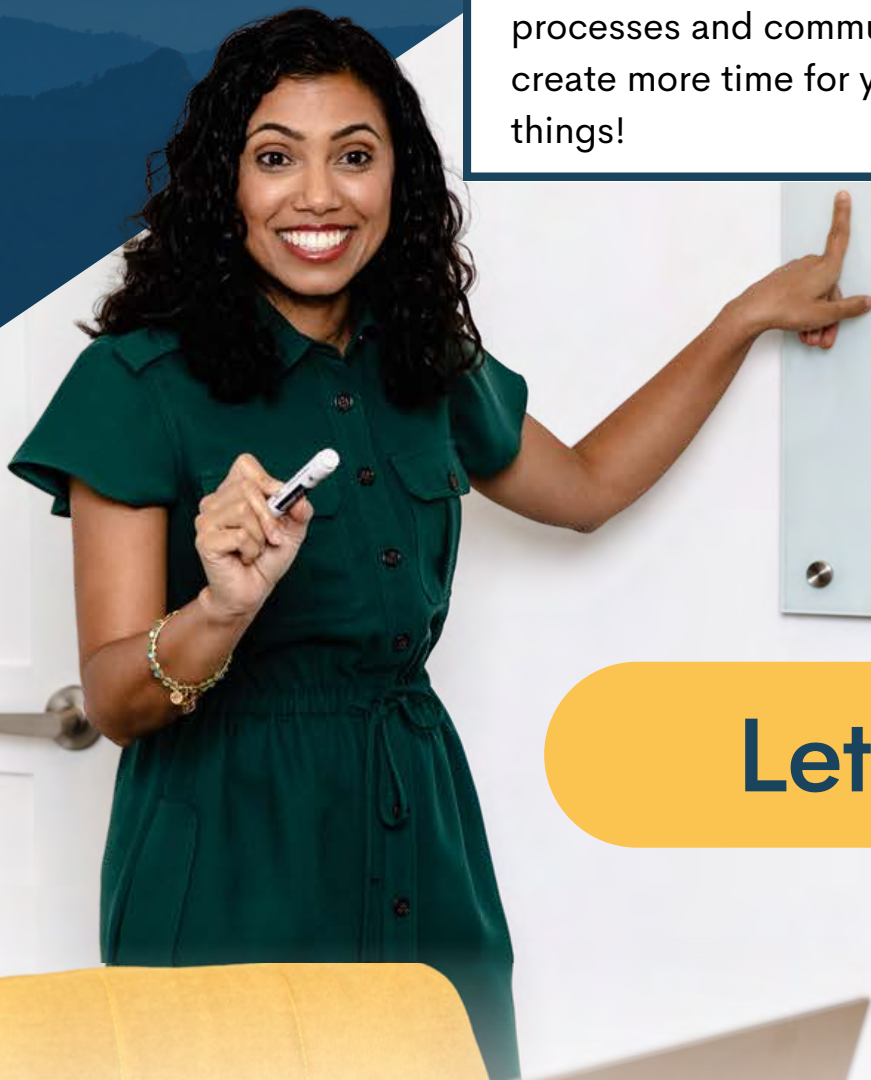
**Jenn is ready to connect, collaborate and climb to the next level with you.
Are you ready to rise? [Jump on a meeting with her!](#)**

#BetterRelationshipsBetterBusiness

WORK WITH ASCENDER

Interested in learning more about the concepts discussed in this document?

Let's talk about how we can implement the right processes and communication in your business to create more time for you to focus on the important things!



Let's Talk 

www.AscenderConsulting.com

