

HOW TO SAY NO TO A LESS-THAN-IDEAL CLIENT [EMAIL TEMPLATE]



THE PIECES

HOW TO SAY NO TO A LESS-THAN-IDEAL CLIENT [EMAIL TEMPLATE]

#1 Thank them for reaching out.

#2 Tell them why you won't be serving them.

- I don't provide this service anymore.
- I don't work with this type of client anymore.
- Other:

#3 Reiterate what they say they're looking for.

#4 Point them in the right direction - to a person or a resource that might serve them best.

OPTIONAL: If referring them to someone specific, ask, "Would you like me to personally introduce you to [Name]?"

EXAMPLE 1

HOW TO SAY NO TO A LESS-THAN-IDEAL CLIENT [EXAMPLE 1]

Hi Renee,

Thanks for reaching out. It's always great to hear of a satisfied client referring someone to me.

Now, I used to provide web design and branding services to any business, but now only offer these services to non-profits and small, mission-driven businesses. With that said, I don't think I'd be a great fit for your company.

However, I'm happy to recommend another trusted designer so you can find the right fit for the job.

If you're seeking a designer that can handle it all - a full rebrand and a website re-design - I have to recommend Angie Smith and her team at Defined Design. She's incredible and I'd bet she'd be thrilled to get to work with you.

I know Angie well and would be happy to facilitate a personal introduction. Would you like me to introduce you via email?

Let me know,

Jenny

EXAMPLE 2

HOW TO SAY NO TO A LESS-THAN-IDEAL CLIENT [EXAMPLE 2]

Hi Janelle,

Thanks so much for reaching out. I'm always happy to receive new client inquiries.

Now, I used to offer day-of wedding planning, but discontinued that service at the beginning of this year. I now offer full-service wedding planning exclusively, so if you're looking for someone to be there every step of the way with you, I'm your girl!

If you're still seeking someone just for the day of your wedding, I'm happy to recommend another trusted Planner so you can find the right fit for the job.

For Day-Of Services, I have to recommend Joanne Dott of Prim Events. She's incredible and I'd bet she'd be thrilled to get to work with you.

I know Joanne well and would be happy to introduce you.

Let me know which you'd prefer - Full-Service Planning or a intro to Joanne.

Talk soon,

Beth

EXAMPLE 3

HOW TO SAY NO TO A LESS-THAN-IDEAL CLIENT [EXAMPLE 3]

Hi Delia,

Thanks so much for reaching out. I'm always happy to receive new client inquiries.

Now, I used to offer general Virtual Assistant services, but now specialize in social media management and at a higher rate than before. Being that you're looking for a more generalize VA, I don't think I'd be the best fit.

However, I'm happy to recommend the best place to search for the right person.

If you're searching for someone local, I have to recommend searching on the Chamber of Commerce Employment Board. A few of my local clients have found great people there. And if you're not tied to finding someone local, I would search on Upwork - my best jobs come from there and the pool of people to choose from is much larger.

Best of luck finding the right fit! Let me know if you'd like any other recommendations.

Michele