Client Communication & Follow-Up Toolkit

The Housing Specialist™ — Housing Made Possible

Educational tool. Protect client privacy. Do not enter confidential information.

1. Communication Principles

■ Be clear about my role and what I can and cannot do
■ Listen actively and confirm understanding
■ Set realistic expectations early
■ Document important agreements and next steps
■ Follow up when promised

2. Managing Client Expectations

Scenario: A client expects an apartment to be approved immediately after submission.

Four-Step Response:
1. Acknowledge the concern: _____
2. Clarify the process: _____
3. Explain next steps: _____
4. Agree on follow-up: _____

3. Professional Message Templates

Follow-Up Message:

_____
_____

Status Update Request:

_____

Explaining a Delay:

_____
_____

4. Follow-Up Planning Worksheet

Item / Task	Responsible	Target Date	Status

5. Difficult Conversations & Escalation

Situation: Client raises an urgent concern outside my authority.
How I would respond:

_____
When I would escalate:

_____
Who I would escalate to:

_____

6. Communication Quality Review

What went well in recent client communications?

_____

What could be improved?

_____

One practice I will apply next week:

_____