

# The Change That Needs to Happen

## How to stop circling the block and move one client request forward

You know something needs to change.

Your default response is no longer working. Maybe it is a client communication you have been avoiding. Maybe it is a request you need to make. Or something as simple as a follow-up that should have happened already. Whatever it is, you can feel that your usual way of responding is not getting you where you want to go. You know you can do better. You know the business deserves better too.

**But knowing something needs to change and actually changing it are not the same thing.**

The minute you start thinking about changing, the roadblocks show up. They usually sound responsible. Reasonable. Even wise. As in, “I need to think this through a bit more.” Or, “I don’t have time right now.” And then the always-popular, “I’ll change it next time.” And just like that, the thing that’s been bugging you is taking another lap around the block.

It happens all the time. You identify what needs to change and even put time on the calendar to deal with it. The time arrives. You show up. You think it through just enough to realize it is not going to be simple, neat, or quick. So instead of making a plan or booking the next step, you move on to the next item in your calendar. The issue does not disappear in some dramatic crash. It gets quietly checked off without actually changing.

This shows up especially fast in communication. You need information from a client, or you need approval on a component so you can move to the next phase. And instead of sending the message or making the call, you wait. Not because you don’t care, but because you do. You want to be helpful, professional, fair, and easy to work with. But with an already overflowing calendar, those good intentions can turn into hesitation, avoidance, and unintended consequences.

**This guide is here to help you catch and release that pattern with a simple step-by-step process.**

Inside, you will work through a practical framework to help you recognize the real change you want to make and fully see the familiar roadblock without shutting down. Instead, you will create a small fork in the road that gently steers you into problem-solving mode instead of defaulting to the same old, same old. We are starting with one of the most common communication triggers: contacting the client and needing a reply.

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# Worksheet: From Roadblock to Request

Use this worksheet when you need to ask a client for information, follow up when it has not arrived, or get approval so the work can move forward.

You are not here to magically transform into a Communication Wizard by completing one worksheet. You are here to take one client request, kick the roadblock to the curb, and turn it into a clear, professional message you feel good about sending.

If you get stuck as you work through this, that does not mean you are doing it wrong. This is a simple exercise in slowing the pattern down long enough to choose your next step. Answer the question in front of you as honestly as you can, and keep moving.

## 1. What needs to change?

You are here because you need something from one of your clients.

Here are a few areas this worksheet can help with:

missing information	delayed response
client silence	waiting on approval
follow-up not answered	work has stalled

Choose the specific situation you are here to change.

- I need to request information from a client
- I need to follow up on information I already requested
- I need approval before moving to the next phase

## 2. What has been holding you back?

Select all that apply:

- I don't know where to start
- I don't want to sound demanding
- I don't have time right now
- I'll deal with it next time
- I don't want to make this awkward

Other:

## 3. Am I keeping this the same or making a change?

- Keeping it the same. Return to Question 1.
- Making a change. Proceed to the next question.

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## 4. How will you handle it?

You've named the situation. Now it's time to choose the medium. How will you communicate the message to your client?

Select one:

- Send an email
- Make a phone call
- Set up a meeting
- Send a message through my usual client channel (text, DM, portal, etc.)

**Other:**

## 5. Consider the consequences safely

Take the option you selected and walk through what could happen.

**If I do this, what is the best that could happen?**

*Hint: The client could reply as requested.*

**If I do this, what is the worst that could happen?**

## 6. Write your first draft

This is where it starts to take shape. You've identified what you need from the client and how you are going to request it, so now it is time to get the words out of your head and onto the page. It might be an email. It might be a phone script. Bullet points are fine at this stage. The important part is that you are making it real.

**Draft:**

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## 7. Turn it into a clear request

Now take what you wrote above and shape it into a clear, complete request. Keep it simple and professional. State what you need.

### Specific request:

## 8. What support am I willing to offer?

You have written what you need, and it may feel a bit direct. That is okay. This is where you add the support that helps your client respond without confusion, shame, or guesswork. You are not softening the request to make it disappear. You are showing your client how to work with you clearly and professionally.

### Suggestions:

provide a template

walk through the request together

break it into steps

answer questions

### I am willing to offer:

## 9. What is the deadline and what happens next?

Setting expectations can feel pushy or demanding. In reality, they give your client the guidance they need. Without them, your request gets read, mentally parked as “I’ll do it tomorrow,” and then quietly disappears.

When you set a clear date and what happens next, your client understands their role in the process. And more often than not, they respond.

### Examples:

the work will pause

critical deadline may be missed

next phase cannot begin

additional fees may apply

### I need this information / approval by:

### If this does not happen, then:

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## 10. Pulling it together

You have drafted the components of the professional message you have been avoiding. Now it is time to put it all together.

Combine your responses from Questions 7, 8, and 9.

*Feel free to use your favourite AI tool to help with this.*

Take a breath and read it over. It is almost time to send it to your client. If you are like most people I work with, this is where the final roadblock shows up and says, “Don’t do it.”

So before you send it to your client, share it with me at [jen@jenniferbauldic.com](mailto:jen@jenniferbauldic.com). I will personally review it and share my thoughts, encouragement, and any small suggestions that may help you feel ready to move forward.

You’ve got this. We did it together.

**I sent this to Jen on:**

## If You Get Stuck

If you find yourself circling one question, overthinking your options, or feeling unsure about the next step, that does not mean this is not working. It usually means you have found the roadblock. That is normal.

This is about taking one achievable step at a time. You are here to move one client request forward with more clarity, support, and professionalism.

You do not have to work through it alone. Send me an email, and we can sort out the next step together.