



Client, Team and Tenant Agreements Workshop

Topic

**Creating simple, clear, focused,
seamless agreements**

Teacher

Nina L. Kovner

Intention

**Provide frameworks and
processes to ensure your
agreements are aligned with your
brand, vision, and values along
with simplifying your
communications**

Workshop **Overview**

- ➡ **Why We Have Agreements**
- ➡ **Why Agreements vs. Policy or Contract**
- ➡ **Where Do Agreements Fit?**
- ➡ **How To Design Your Agreements**
- ➡ **How To Adhere To Your Agreements**
- ➡ **Next Steps**

Why We Have Agreements

“

**The single biggest problem in communication
is the illusion that it has taken place.**

- George Bernard Shaw

**The leader's job is to ensure folks
feel safe, seen, and supported.**

**Clear communication and clear
expectations are one way to do this.**



Why We Have Agreements

- **Managing Expectations**
- **Clear Communications**
- **Healthy Boundaries**
- **Coaching and Feedback Tool**
- **Time-saving**
- **Less anxiety and angst**
- **Ability to spend more time focusing on leading, supporting and loving your folks**



Most folks want and need clarity, guidelines, guideposts, and some form of structure that eliminates misunderstanding, confusion, and unnecessary anxiety.

“

Clear is kind, unclear is unkind.

- Brene Brown

Why Agreements vs. Policy or Contract

Words Have Power and Meaning

The outcome you're seeking is a shared one.

- A policy is one-sided.**
- A contract is one-sided.**
- An agreement connotates two or more people agree.**

Where Do Agreements Fit?

Agreements Fit **Everywhere** In Your Business

- **Team Agreement**
- **Client Agreement**
- **Tenant Agreement**
- **Influencer Agreement**
- **Educator Agreement**

Where Do Agreements Fit?

For Teams + Tenants

- **Part of the Team Handbook**
- **A stand-alone document**

For Clients

- **On your website/booking site**
- **Part of your new client's intake form**
- **Linked to confirmations (text or email)**
- **At the footer of your emails**
- **In a Highlight on the gram**
- **On Yelp, Google Business, Nextdoor**
- **On your link management platform**

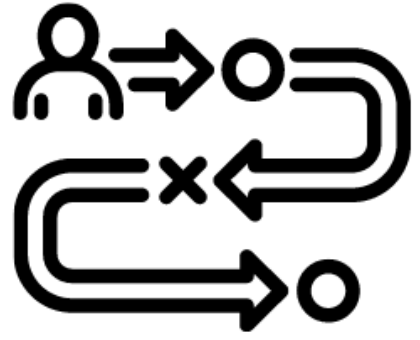
Where Do Agreements Fit?

Tech and Tools That Can Help

Most booking apps have options to customize and add Client Agreements. Check with the platform first to keep things simple and seamless.

If you do not have that option, Apps like JotForm can be linked to your process.

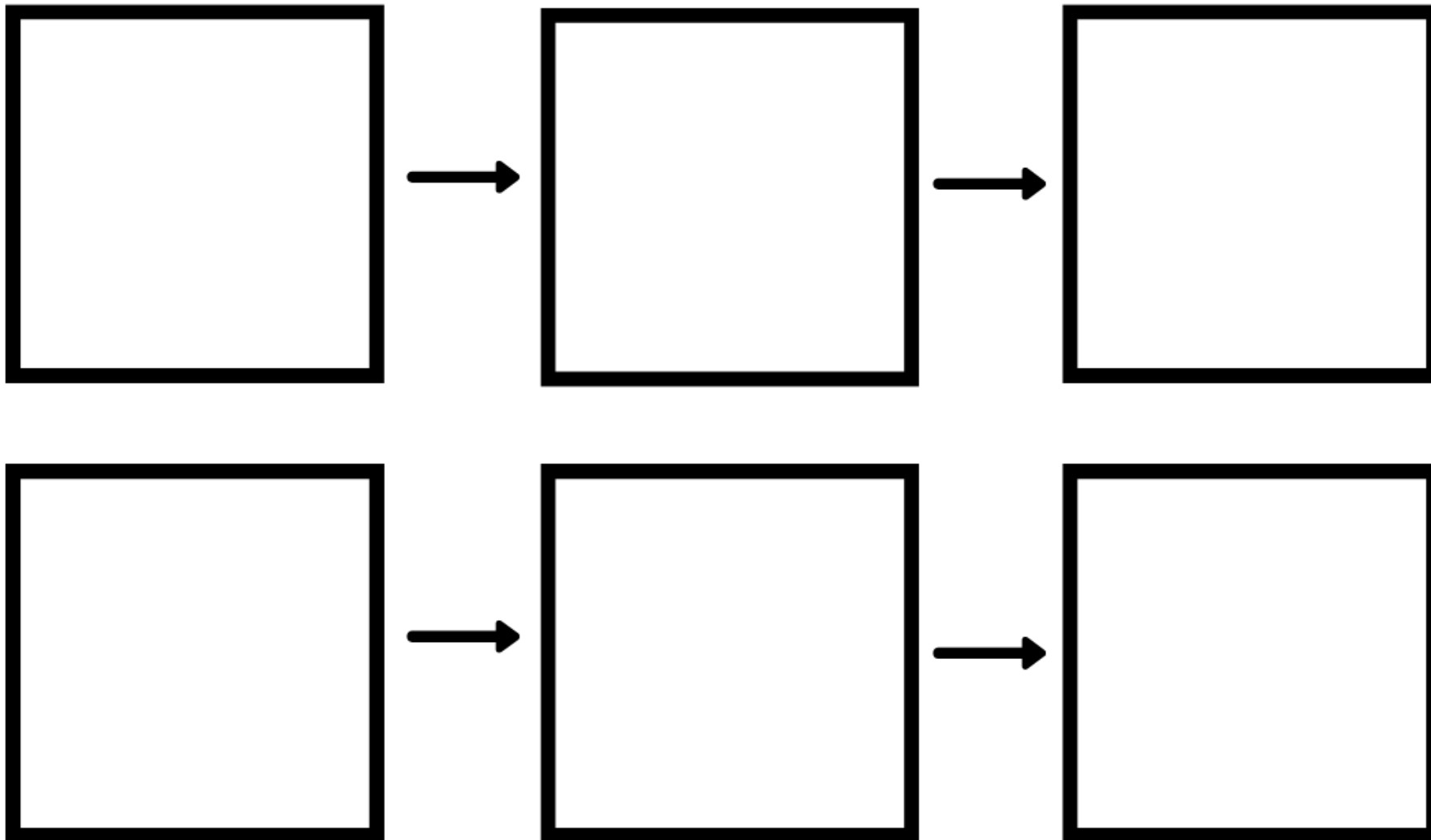
Stay mindful of your Awesome Client Journey!

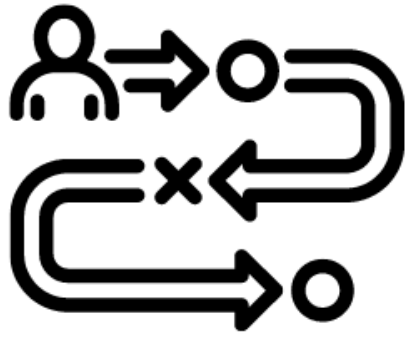


My Awesome Client Journey Map

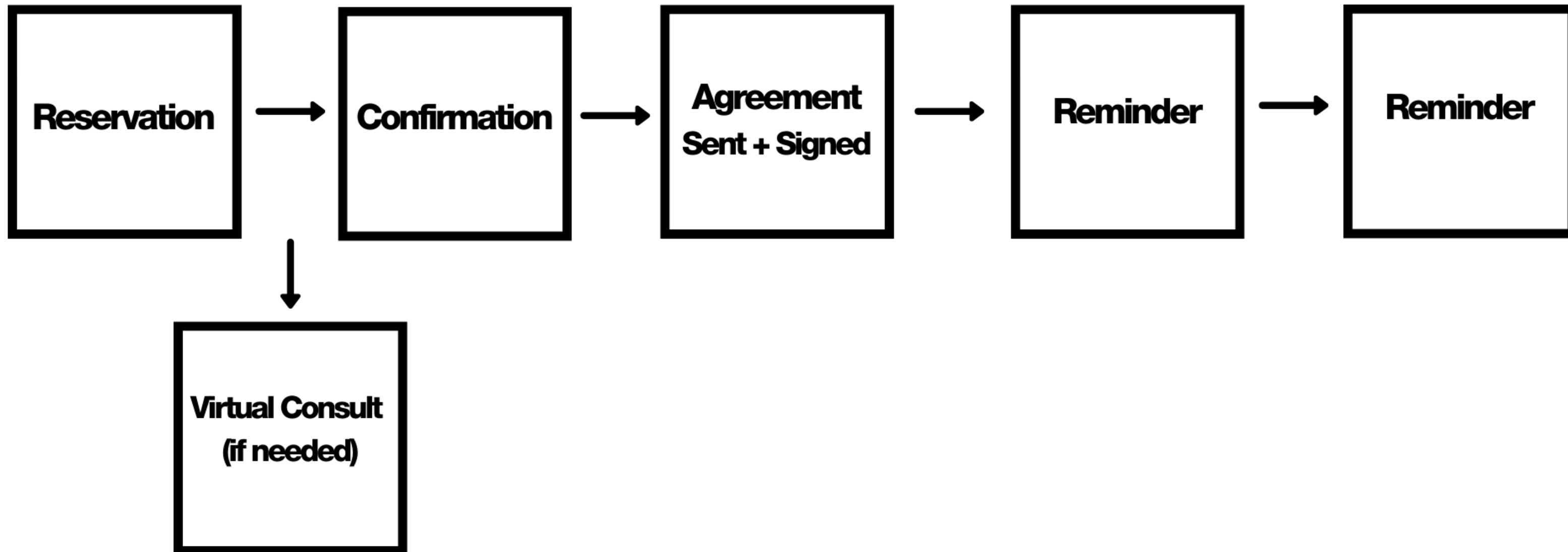
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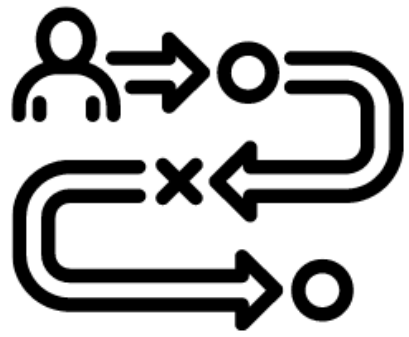
Outcomes + Optimizations



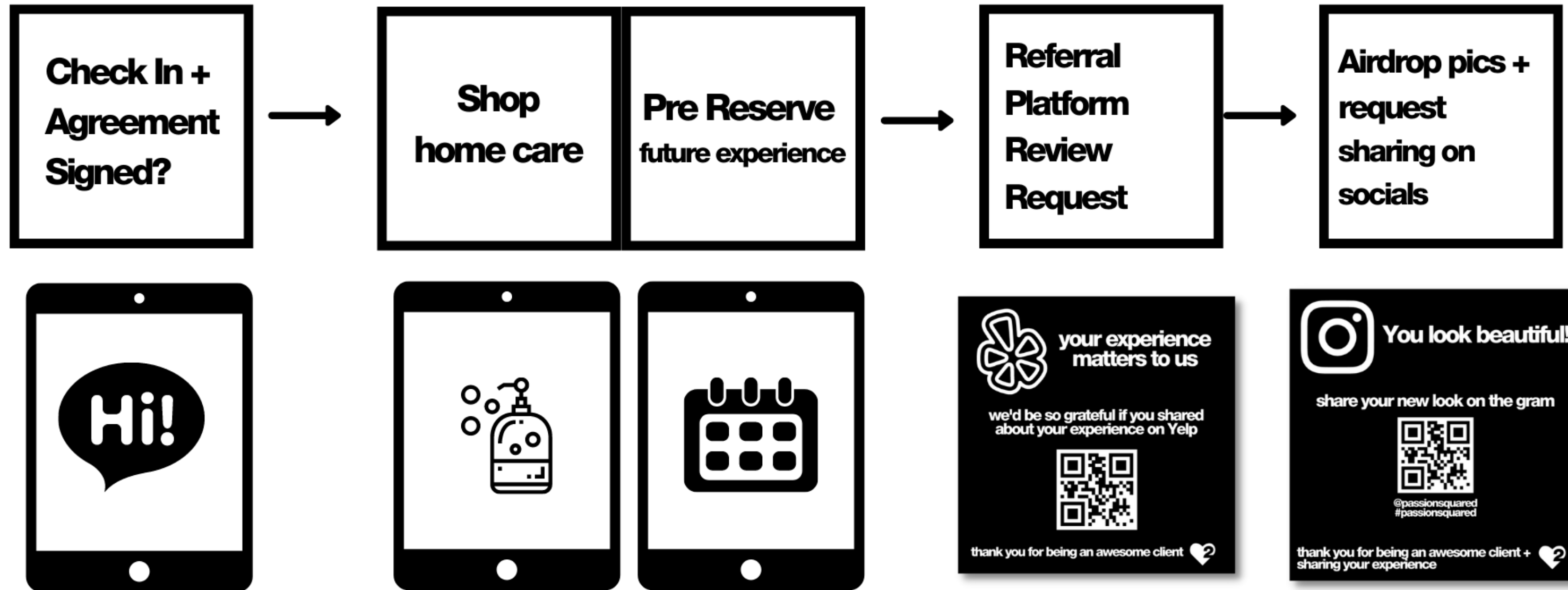


My Awesome Client Journey: **Pre-Experience**





My Awesome Client Journey: **Experience**



Where Do Agreements Fit?

For Education Events

- A stand-alone document**

For Influencer Partnerships

- A stand-alone document**

The **Awesome** Team Handbook Template

PassionSquared.♥

PASSION SQUARED TEAM HANDBOOK

empowering people, passions and purpose.



THE PASSION SQUARED BRAND

They say follow your heart to live your passion + purpose. But where are “they” when you are overwhelmed, over-budget + over it? Life can be chaotic + beautiful, just like creative small businesses and the passionate humans like you that lead them. At Passion Squared, we go straight to the heart of the matter to help you find clarity. We help eliminate the confusion and chaos around how to create, build and grow your creative small business.

Purpose- empower the people we love by helping them make good decisions for their brand while eliminating confusion + overwhelm.

Promise- you will feel seen, heard, understood, and loved. We will always be honest, kind, practice healthy boundaries, and create a culture of trust.

People- we serve creative small business owners who are passionate about their insides as much as their outsides.

**"CLEAR IS KIND,
UNCLEAR IS
UNKIND"
BRENE BROWN**

PASSION SQUARED TEAM HANDBOOK

empowering people, passions and purpose.



PASSION SQUARED BRAND VALUES

Trust- We are committed to cultivating a culture of trust. When we trust each other, we can honor and celebrate the awesome stuff and navigate the tough stuff in a healthy, loving way.

Communication- Almost everything can be solved with healthy communication. At Passion Squared, we believe that strong communication begins with trust and is practiced through healthy boundaries.

Relationships- Without the relationships, we have with each other and our clients, there is no business. We care deeply about you and our clients, and we work very hard to build trust and practice healthy communication as they are the foundations of strong relationships.

**"TRUST IS BUILT ON
PROMISES KEPT."**

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THE HISTORY OF PASSION SQUARED

I could not go another day seeing creative small business owners suffer. I could not go another day witnessing short-term motivation, which almost always ended up in more confusion, chaos, and self-sabotaging. Let's be honest. Creative entrepreneurs typically do not have a strong business background; actually, most times you have NO business background. This, coupled with the real struggle of self-worth, self-care, and self esteem makes for a not so awesome journey. I've been there, I understand, and I have fought and gratefully won many of these battles you face. The answer was simple. With decades of business and life experience, I decided to create a safe space to empower the people I love, that's YOU! You have a gift and it's time for you to use it to create your own kind of awesome. This is my calling. This is my purpose. Passion Squared is here because I finally said YES to walk in my purpose and live an authentically awesome life and now I can help empower you to do the same. Love- Nina

"THE PURPOSE OF LIFE IS NOT TO BE HAPPY. IT IS TO BE USEFUL, TO BE HONORABLE, TO BE COMPASSIONATE, TO HAVE IT MAKE SOME DIFFERENCE THAT YOU HAVE LIVED AND LIVED WELL."— RALPH WALDO EMERSON

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THE PASSION SQUARED EXPERIENCE

Our experience looks and feels like LOVE.

We are committed to creating an environment that feels good, safe, and comforting.

This can be seen and felt by the way we communicate, the eye contact we use, our dialogue, our presence for our clients and each other.

We hug with consent. We listen, really listen, and listen with curiosity. We walk people to where they need to be. We answer questions promptly. We respond to messages, calls, emails, texts promptly.

We make it super easy to engage with us, online and off.

We are generous with our energy and want you and our clients to feel how loved you are.

**"I'VE LEARNED THAT PEOPLE WILL FORGET WHAT YOU SAID, PEOPLE WILL FORGET WHAT YOU DID, BUT PEOPLE WILL NEVER FORGET HOW YOU MADE THEM FEEL."
MAYA ANGELOU**

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THE PASSION SQUARED AGREEMENTS

We are committed to working on our insides
as much as our outsides.

We practice healthy boundaries in all
communications and situations.

We give each other permission to be human,
and support each other in both the awesome
times and tough times.

We believe that kindness and compassion are
the foundation of connection.

We show up for each other no matter how we
are feeling. We practice forgiveness and seek
first to understand.

We know that trust is built on promises kept so
we keep our promises and when we don't, we
take responsibility and make adjustments.

We respect each other's experiences +
identities and understand that while they are
different from ours, that does not mean they
are not valid.

**"WHEN WE FAIL TO
SET BOUNDARIES
AND HOLD PEOPLE
ACCOUNTABLE, WE
FEEL USED AND
MISTREATED. THIS
IS WHY WE
SOMETIMES
ATTACK WHO THEY
ARE, WHICH IS FAR
MORE HURTFUL
THAN ADDRESSING
A BEHAVIOR OR A
CHOICE."— BRENE
BROWN**

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THE PASSION SQUARED AGREEMENTS

What our agreements look like in action.

Showing up on time.

Taking care of our own energy, and when we
need help, we ask for it.

Not gossiping or being unkind.

Being honest and open with communication.

Handling issues when they appear.

Being open to coaching, redirection,
adjustments including our required reading.

Gender affirming spaces, language, services +
pricing.

Taking personal responsibility and not taking
anything personally.

Holding each other accountable, with
kindness.

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TEAM HANDBOOK



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THE PASSION SQUARED
AGREEMENTS

Non-Negotiables

We both create and capture experiences in order to build and deepen relationships to help us all grow. One way we do that is by creating and sharing content online.

We do not tolerate gossip.

We do not tolerate racism, homophobia, transphobia, misgendering, misogyny, or gaslighting.

We do not tolerate being high at work.

We do not tolerate disrespectful behavior towards clients or each other.

We do not tolerate theft of any kind.

We do not tolerate broken boundaries, both internal and external.

"WHEN WE FAIL TO SET BOUNDARIES AND HOLD PEOPLE ACCOUNTABLE, WE FEEL USED AND MISTREATED. THIS IS WHY WE SOMETIMES ATTACK WHO THEY ARE, WHICH IS FAR MORE HURTFUL THAN ADDRESSING A BEHAVIOR OR A CHOICE." BRENÉ BROWN

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THE PASSION SQUARED
AGREEMENTS

Required Reading

-The Four Agreements

-My AwesomeAF Boundary Book

-Start With Why

-The Gifts of Imperfection

Additional Resources

-The Dress Code Project

- Human Rights Campaign

- TEDTalk Coming To Terms With Racism's Inertia by Rachel Cargle

"WHEN WE FAIL TO SET BOUNDARIES AND HOLD PEOPLE ACCOUNTABLE, WE FEEL USED AND MISTREATED. THIS IS WHY WE SOMETIMES ATTACK WHO THEY ARE, WHICH IS FAR MORE HURTFUL THAN ADDRESSING A BEHAVIOR OR A CHOICE." BRENÉ BROWN

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THE PASSION SQUARED
AGREEMENTS

Our Promise To You

We will practice what we preach.

We will be open to your feedback without retaliation.

We will practice healthy boundaries and nonviolent communication with you.

We will create a safe space for you to grow.

We will handle issues promptly.

We will always be honest and kind.

We will hold you, and ourselves, accountable to our agreements.

“THREE THINGS YOU SHOULD NEVER BREAK: PROMISES, TRUST, AND SOMEONE’S HEART.” ANONYMOUS

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PASSION SQUARED TRAINING + COACHING

How We Train

New Team Member Training
Advanced Technical Training
Healthy Boundary Training
Racial Equity Training
Gender Affirming Training
Social Media Training
Operations Training
Offsite Training

How We Coach

Monthly Team Gatherings
Weekly One On One Check In's
Quarterly Assessments

**"THE MORE THAT
YOU READ, THE
MORE THINGS YOU
WILL KNOW. THE
MORE THAT YOU
LEARN, THE MORE
PLACES YOU'LL GO."
DR. SEUSS**

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PASSION SQUARED CAREER PATH

We are here to serve, grow, support, and love
you. Here are the ways you can grow at
Passion Squared.

- 1.
- 2.
- 3.
- 4.
- 5.

**"ANYONE WHO HAS
NEVER MADE A
MISTAKE HAS
NEVER TRIED
ANYTHING NEW."
ALBERT EINSTEIN**

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empowering people, passions and purpose.



PASSION SQUARED OPERATIONS

In order to keep our promises and create an awesome experience, we've created proven systems to ensure that happens.

Opening System

Closing System

Greeting System

Beverage + Snack System

Booking System

Payroll System

Inventory System

Cleaning + Laundry System

Insurance + Benefits System

Content Creation System

Brand Identity Package

**"SYSTEMS FAIL WAY
MORE THAN PEOPLE
DO. CHANGE THE
SYSTEM, CHANGE
THE RESULT."**

How To Design Your Agreements

Awesome Client Agreements

Are aligned with your brand purpose, promise, and people.

Are clear, simple, and concise.

Are infused with healthy boundaries (not walls)

Uses language that is aligned with your brand.

Have strong systems to facilitate them.

Take into consideration that clients are human and things will never be perfect.



Awesome **Client Agreements Framework**

What the experience and promise are.

The process for reserving an experience in detail.

What the communication process looks like in detail.

What the confirmation process looks like in detail.

What the cancellation process looks like in detail.

What the no-show process looks like in detail.

What you both agree to in this process and promise.

Simple opt-in/signing of the agreement.

Awesome Client Agreements Framework **(example)**

What the experience and promise are.

The Passion Squared experience is focused on ensuring you feel seen, heard, and loved. Our commitment to you is to consistently deliver on that promise.

What the communication process looks like in detail.

To ensure you have a joyful, seamless experience, we use both text messaging and email for our client communications during business hours which are 10 am- 6 pm Tuesday through Saturday.

The process for reserving an experience in detail.

We use an online reservation platform to ensure you can reserve your experience when it's most convenient for you, 24/7, 365. Simply visit passionsquaredbooking.com to see your current reservation, make changes, and reserve future experiences.

What the confirmation process looks like in detail.

Upon reserving your experience, you will receive both a text and email confirmation with the details of your reservation will receive two reservation reminders; two days before your reservation and 1 hour before.

Awesome Client Agreements Framework

(example)

What the cancellation process looks like in detail.

If you need to cancel your reservation, you are given that option with the 2 day reminder text and email. If you need to cancel after you have confirmed your reservation, you can do that on our reservation platform at passionsquaredbooking.com. There will be a \$50 charge to your credit card on file if you cancel inside the 48 hour confirmation window.

We do understand emergencies happen, if that is the case, please email us at awesome@passionsquared.net and we will find a solution. If we need to cancel your reservation inside the 48 hour confirmation window, a \$50 credit will be added to your account for future experiences or product purchases.

What the no-show process looks like in detail.

If you forget about your reservation after confirming and do not show up, there will be a \$100 charge. We do understand emergencies happen, if that is the case, please email us at awesome@passionsquared.net and we will find a solution for you.

What you both agree to in this process and promise.

We are honored you have chosen us to take care of your beauty and wellness needs. We promise to take care of you and ask that you promise to help us do that by adhering to our agreement.

Simple opt-in/signing of the agreement.

Click here to sign and agree. Check this box to sign and agree. Etc.

Be Mindful of The **Design Part**



When you're designing your Agreements consider:

- What outcome you are seeking from the Agreement**
- The contents of the Agreement**
- The context (placement) of the Agreement**
- The graphic design of the Agreement**

How many business policies, contracts, or agreements to do actually read all the way through? LOL.

Design is the intermediary between information and **understanding.**

HANS HOFMANN



Thinking about design is hard, but not thinking about it can be **disastrous.**

RALPH CAPLAN



Everything is designed.
Few things are designed well.

BRIAN REED



Before

CERTIFICATION POLICIES, CONTRACT & WAIVER

We ask that all students read and agree to our policies for their benefit and the benefit of all participants.

Levels

1. Students enroll in each of the Levels; Discovery, Professional I & II, Advanced Practicum I & Advanced Practicum II separately. Only students who have paid in full may participate.
2. We reserve the right to cancel any program. If a program is canceled the program fee may be transferred to a new program, or refunded in full.

Professionalism & Responsibilities

1. We ask that students bring a positive attitude and good energy to the studio, especially while training clients.
2. Being on time reflects the level of respect we have for our peers, clients and for this program. We ask that students arrive at least 10 minutes prior to all workshops/client appointments, and are settled and prepared to begin working on time.
3. All equipment must be cleaned and put back in its place after use.
4. All food & drink must remain in the student lounge at all times.

After



WHOLE BODY METHOD
PILATES EDUCATION

Certification Program & Agreements

Welcome to Whole Body Method Classical Pilates Certification Program.
We're grateful you chose us for your Pilates journey.

In order to provide you with the best Certification experience, we ask that all students read and agree to our agreements for your benefit and the benefit of all students.

Levels of Certification

You are invited to participate in each of the Certification Levels:

- Level 1 – Discovery
- Level 2 – Professional I
- Level 3 – Professional II
- Level 4 – Advanced Practicum I
- Level 5 – Advanced Practicum II

Full payment is required prior to the start of each level to participate.

Note: Things happen. We reserve the right to cancel any program and will provide as much notice as possible when possible. If a program is canceled your program fee may be transferred to a new program or refunded in full.

Professionalism & Responsibilities

To create a healthy, relaxed, and wellness-focused environment, we ask that you respect the following agreements:

1. As a student, we ask that you bring a positive attitude and good energy to the studio, both while training clients and with each other.
2. Being on time reflects the level of respect you have for our peers, clients, and this program.
We ask that you arrive at least 10 minutes prior to all workshops/client appointments, and are settled and prepared to begin working on time.
Students who are continually tardy may be denied entry into the subsequent levels.
3. All equipment must be cleaned and put back in its place after use.
4. All food & drink must remain in the student lounge at all times.
5. No student or client cell phones are allowed on the training floor. Place phones on vibrate or silent in the student lounge.
6. No videotaping is allowed except in the case that you are filming for social media, and in that case, ensure you have permission from all parties involved.
7. No chewing gum while in the studio.
8. No bags on the training floor. Books related to certification are the only items allowed.
9. We ask that students wear clothing appropriate for a professional Pilates Instructor such as leggings, yoga pants, and a fitness-friendly top. Toe socks are required when working out on our equipment.
10. No unsupervised children or pets in the studio.
11. No scented perfumes while in the studio.
12. Behavior is to be consistent with the Whole Body Method Philosophy of courteousness and respect for instructors, clients, and fellow students. Please read our philosophy in our Certification Program Guide.

Awesome Team/Tenant **Agreements** **Framework**

Awesome Team/Tenants **Agreements...**

- **Are aligned with your brand purpose, promise, and people.**
- **Are clear, simple, and concise.**
- **Are infused with healthy boundaries (not walls).**
- **Uses language that is aligned with your brand.**
- **Have strong systems to facilitate them.**
- **Take into consideration that team members and tenants are human and things will never be perfect.**

Awesome Team/Tenant **Agreements Framework**

- **What the brand, experience, and promises are.**
 - **Detailed benefits**
 - **A detailed process of doing things.***
 - **What the non-negotiables are.**
 - **What you both agree to in this process and promise.**
 - **Legal stuff**
 - **Simple opt-in/signing of the agreement.**
-
- **Cleaning, inventory, client amenities, payroll, lease payments, etc.**

Educator Agreement

- **What the event is**
- **Days and times**
- **The objectives of the event**
- **The deliverables of the event**
- **The investment (including deposits and balance due dates)**
- **Cancellation agreement in detail**
- **Health and safety protocols if applicable**
- **Signature and date of both parties**

Educator Agreement Example



Proposal for Jennie Wolff + Melissa Bennett
Faces of Sola + Sola Sessions Fall 2021

Date
July 22, 2021

Event Date
September 27th, 2021

Objectives

- Inspire, educate, connect and empower the Faces of Sola attendees
- Inspire, educate, connect and empower the Sola Sessions attendees
- Help with the awareness and promotion of Faces of Sola and Sola Sessions

Deliverables

- Design, prepare and deliver a 3-hour workshop for Faces of Sola focused on brand authenticity + storytelling in the social + digital world
- Design, prepare and deliver a 30 minute pre-recorded class for Sola Sessions attendees focused around aligning your vision, values + authenticity with your brand, business, boundaries and daily decisions



Investment

Workshop
+ Class

Your investment includes

- A minimum of 3 pre-event, 3 on-site and 1 post-event social media posts (on page + stories with swipe ups)
- A minimum of 3 mentions in Facebook LIVE, Instagram LIVE and newsletter
- A minimum of 2 mentions in our A School Facebook Group + newsletter
- Instagram + Facebook link in bio placement for pre-event promotion
- Custom Workbook design for Faces of Sola attendees

Plus travel, food and event related expenses

A 25% fee deposit is requested to secure the date

Deposit: \$1500

An invoice will be sent for the deposit upon agreement.

An invoice will be sent after the event for the balance and any expenses incurred.



Agreement + Terms

Sola Salon Studios agrees to engage Nina L. Kovner of Passion Squared for a Sola Sessions Class + Faces of Sola Workshop.

Sola Salon Studios agrees to pay the full deposit to hold the date and the remainder of the fee will be paid within 30 days after the event including all expenses connected with the event.

Passion Squared agrees to conduct a class, Workshop + the social media promotion agreed upon.

If for any reason the events are cancelled, Sola Salon Studios agrees to forfeit the deposit. If for any reason Passion Squared cancels, the deposit will be returned in full.

Sola Salon Studios agrees they will do everything in their power to ensure the venue is safe and protocols are in place to reduce the spread of COVID. Nina L. Kovner will do everything in her power to ensure she is protecting the group including proof of vaccination, a pre event COVID test and masking indoors.

X Nina L. Kovner
Nina L. Kovner, Passion Squared

Date: 7/22/2021

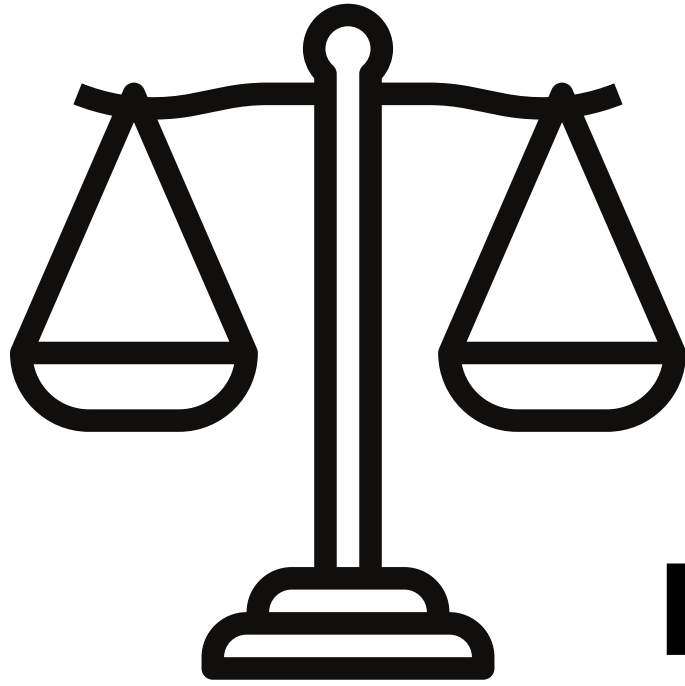
X _____
Jennie Wolff, Sola Salon Studios

Date: _____

Influencer Agreement

- **The objectives of the partnership**
- **The deliverables of the partnership**
- **The investment of the partnership**
- **The length of the partnership**
- **Cancellation agreement in detail**
- **How the partnership will be measured**
- **Signature and date of both parties**

This can be included in your Media Kit or separate, depending on the brand



The **Legal** Stuff

Each city, state, county, and country has different labor laws.

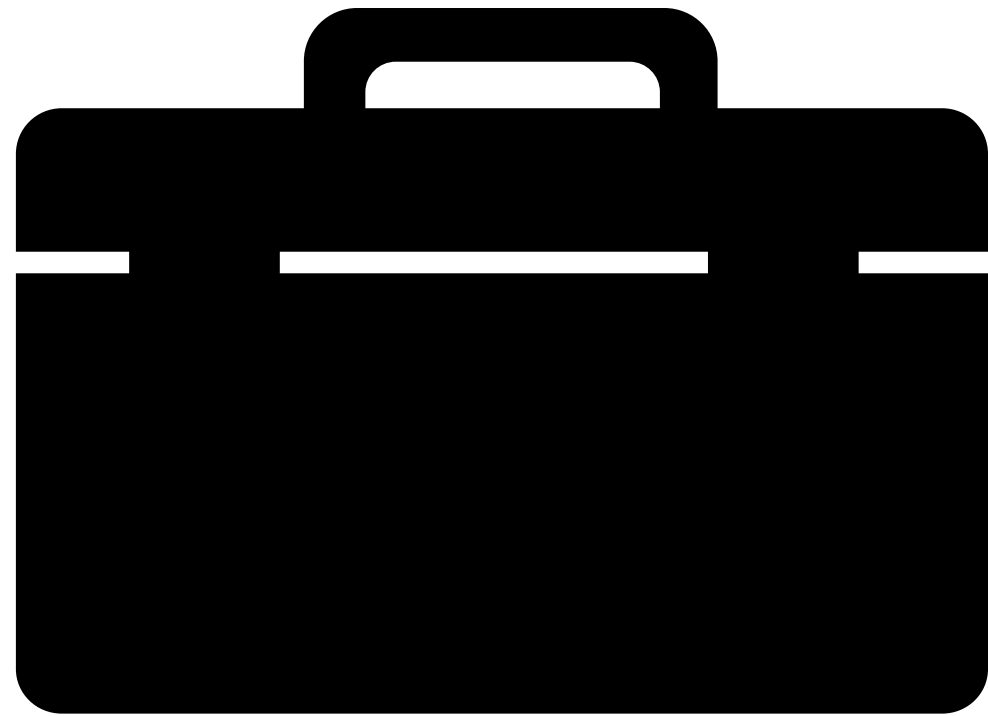
This is why we recommend engaging a local employment attorney when creating tenant or team agreements to ensure both you and your team/tenants are protected by law.

How To Adhere To Your Agreements

Consistency builds trust

Trust builds relationships.

Relationships build businesses and brands.



What you have in your **toolbox:**

- **Healthy Boundaries**
- **Courage**
- **Commitment to clear communication**
- **Frameworks**

My AwesomeAF Healthy Boundary Handbook

wisdom, context, conversation
frameworks + tools for people-pleasers +
joy seekers

created with **love** by
Nina L. Kovner, Passion Squared



Healthy Boundary Conversation Framework

Try using this framework when you are facing a difficult or uncomfortable conversation, you know, the ones you try to ignore or avoid.

What is the situation?

How am I feeling right now?

How do I want to feel?

What outcome am I seeking?

My unhealthy boundary response

My healthy boundary response

My next steps

What were the results of using healthy boundaries in this situation?

Biz Boundaries IRL

Situation

Team member consistently breaks business agreements (rules)

No Boundary Response

Do nothing. Avoid. Make excuses for them.

Healthy Boundary Response

Be clear the team member understands the agreements.

Ask them how they are doing, what is happening with them, and what type of support do they need to adhere to the agreements.

If they ask for support, be clear with what you can provide, and keep your promise.

Ask them how they will ensure they can adhere to the agreements and be clear about what the consequences are if they do not.

The Conversation

Before you begin the chat, be sure you have consent and are in a safe, neutral space.

You: Nina, I noticed you came in 15 minutes late three times last week. I wanted to check in and see what is happening and how you are feeling.

When you come in late, I make up that you are struggling with something and I feel disrespected.

Nina: I know, it's just, there is so much happening at home and I didn't want to tell you because I don't want to be fired. I'm sorry.

You: Nina, your wellness and happiness are a priority to me along with you adhering to our agreements. What can I do to support you in showing up on time?

Nina: I guess just knowing that I can talk to you and doing my best to not bring my drama into work. Also, could I have next Wednesday off to take care of these things?

You: You can always talk to me. I'm happy to hear you are aware of the impact of your lateness and lack of communication. Yes, you can have next Wednesday off. I understand life happens. I also need to be clear that you understand if you come in late one more time we must part ways which would make me super sad. Do you understand?

Nina: Yes, I do. I really love it here and I am committing to showing up on time and if for any reason I cannot, I will communicate with you honestly and clearly.

You: Thank you Nina. We value you as a team member and want you to be able to stay.

Biz Boundaries IRL

Situation

A client is abusive and/or does not respect your boundaries.

No Boundary Response

Do nothing. Avoid. Make excuses for them.

Healthy Boundary Response

Contact client via writing letting them know you have decided you are not a good fit for them and thank them for their business.

Depending on the situation, if you feel they would be a good client for someone else, in your written communication you can provide them a referral. Again, this is very situation-dependent.

Do not reply to their response, no matter what it is. It will likely be ugly, as boundary-less people do not like boundaries, duh.

The Conversation

Before you write your note to the client, take time to process your feels and thoughts. You are in the driver's seat. Do not rush this.

You: Hi Nina. I wanted to reach out to let you know that after careful consideration I realized we are not a good fit for each other. Thank you for being my client. I wish you all the best.

Client: This is disappointing and shocking. What happened?

You (if it's an abusive client): NO RESPONSE!

Client: You suck I am writing a 1 star Yelp review right now.

You: NO RESPONSE.

You (if it's a first time broken boundary): We have had 5 discussions about showing up to your appointment on time. What I make up about that is you have no respect for me, my time or my business. I am sure there is someone out there that can work with your schedule.

Client: OMG I am so sorry, I had no idea you were so upset. I promise to show up on time. I promise. Please take me back.

You: Your response here will be directly connected to how much longer you will accept this type of behavior. One time, two times, maybe, five times showing up late is a pattern that is not likely to change.

Biz Boundaries IRL

Situation

A client texts you at midnight and will not use your online booking system.

No Boundary Response

Do nothing. Make excuses for them. Ignore it. Respond to the texts angrily.

Healthy Boundary Response

Ensure your client understands your booking system clearly. Check and see if you have provided clear instructions on your new client intake forms, on your website, Yelp page, social pages, etc.

Many times this is simply a matter of not understanding.

Remember, just because someone texts you, there is no need to respond immediately. You get to choose when you respond. Period.

The Conversation

Before you have this conversation, be sure your client is 100% clear on the process to book with you.

You: Hi Nina, I saw your text from last night about making an appointment. Here is the link to book. Looking forward to seeing you!

Client: Can't I just book with you via this text. Just put my name on your books.

You: The booking system is the only way to book with me as I want to ensure you get your preferred day and time, along with getting your text confirmation and reminders. If you need help using our system, I am happy to send over a little video.

Client: Fine.

You: Thank you! Have an awesome day.

If the client does not agree to use your booking system, you then have to make a decision if you are OK, really OK, with them texting you at midnight. If you are not, then the next step is to let the client know you do not have availability for them and you are happy to refer them to a business that is a better fit.

Biz Boundaries IRL

Situation

A team member is trying to gossip/talk shit about another team member to you.

No Boundary Response

Do nothing. Listen to them. Spread the gossip.

Healthy Boundary Response

Gossip is highly destructive, hurtful, unkind, and a major boundary violation.

Simply let the gossipers know you are not interested in having this conversation and if they have an issue with someone, you suggest they speak directly to the person.

The Conversation

This is BIG. Only you can stop the spread of hurtful and hateful gossip.

Team Member: OMG Nina, I gotta tell you about the shit Courage did yesterday. You are not gonna believe it.

You: Hey, I know we have talked shit and gossiped together in the past, but I no longer want to be part of those conversations. I appreciate you respecting my boundary on this.

Team Member: What happened? That's so lame. Just listen.

You: No thank you. (walk away!)

You: Hey, I am not interested in hearing what Courage did. Have you spoken to them about it?

Team Member: OMG no, I don't want them to know I know.

You: It would be super kind of you to talk to them. If it was me, I would want to know.

Team Member: Fine. I will try to go gossip/talk shit elsewhere.

Biz Boundaries IRL

Situation

A client calls and says you must fit them in for a service.

No Boundary Response

Squeeze them in. Feel resentful. Negatively impact other clients.

Healthy Boundary Response

Being mindful that we all have different priorities is KEY here.

You can offer clients your available days and times. They can choose to take them or not.

You can tighten your pre-booking process so this situation happens less often.

You can choose to squeeze people in, knowing it is your choice and taking responsibility for the impact of that choice.

The Conversation

We all have different priorities and definitions of urgent. Just because it is urgent for them, does not make it urgent for you.

Client: OMG I just went onto your online booking app and it says you have no openings til December 5. Can you get me in before that?

You: Hi Nina, I am fully booked until December 5th. If that day and the times shown work for you, please book it before someone else does.

Client: But I have a party to go to and I need my hair done.

You: Oh Nina, I wish I had an opening. If you would like I can put you on our cancellation list. If anything opens up we will call you.

Client: That's disappointing. I am a loyal client.

You: Nina, I value you as a client so much, this in no way changes that. I simply do not have availability. I do have the name of another stylist who may be able to accommodate you. Would you like their info?

Client: No, I am taking my business somewhere else.

You: I completely understand. I'm sorry my availability doesn't work for you. Have a beautiful holiday. You are always welcome back if you choose. Thank you for being an awesome client.

Biz Boundaries IRL

Situation

A client no show's with no explanation or follow up.

No Boundary Response

Rant on social media. Do nothing. Change your business agreements because one person no showed. Be resentful and take it out on others.

Healthy Boundary Response

Stuff happens. Clients no show. Clients cancel. It happens. It is part of business. Please remember that.

Communicating with the client kindly and clearly about your business agreements is key. Never assume they read the fine print on your website or watched your Highlight on Instagram.

Only you can determine how to do business with you. Only you can hold that boundary and agreement with your clients. Remember though, having a clear system (confirmations, reminders) can help eliminate this problem.

The Conversation

Before you respond, be sure your client is OK and that you have had time to get centered and grounded.

You: Hi Nina, I wanted to check in to see if you are OK as I was expecting you at 2 pm for your service.

Client: OMG, I am so sorry. I never got a reminder and somehow completely screwed this up on my calendar. Ugh, I feel awful.

You: I'm so happy you are OK, I was worried. I emailed you but it must have landed in spam. Here is a link to rebook. See you soon!

OR

You: I am so happy you are OK, I was worried. A text reminder did go out last week, yesterday, and this morning. Did you get those reminders? Here is a link to our business agreements. I want to be sure you are clear on our no show policy.

Client: Ugh, I missed all those texts. I really am sorry.

You: I understand. Here is a link to our booking agreement. Thank you!

OR

Client: Yes, I got all the texts but I had an opportunity to go on vacation. Sorry.

You: Nina, I truly appreciate you as a client. Respecting our booking agreement is very important so I can ensure all my clients get the best experience possible. I need to be assured you will respect our agreement. Enjoy your vacation.

Biz Boundaries IRL

Situation

A client cancels last minute.

No Boundary Response

Rant on social media. Do nothing. Change your business agreements because one person no showed. Be resentful and take it out on others. Provide a long explanation about not being able to pay your bills.

Healthy Boundary Response

Stuff happens. Clients no show. Clients cancel. It happens. It is part of business. Please remember that.

Communicating with the client kindly and clearly about your business agreements is key. Never assume they read the fine print on your website or watched your Highlight on Instagram.

Only you can determine how to do business with you. Only you can hold that boundary and agreement with your clients. Having a clear system (confirmations, reminders) can help eliminate this problem.

The Conversation

Before you respond, take a big long deep breath and get grounded.

You: Hi Nina, I saw you just canceled your appointment.

Client: Yep, sorry, I got busy.

You: I understand how busy you are and want to be sure you understand our booking agreement. Here is a link if you would like to read it. Since this is your first late cancellation, I will waive the fee. Please be sure you go online to get rebooked. Have an awesome day!

OR

You: Nina, I get it that things come up. Since this is your 3rd late cancellation, you will see a fee charge on your statement. Please use this link to rebook. Thank you! Have an awesome day.

Client: WTF, why are you charging me a fee? I got busy.

You: When you became a client you agreed and signed our booking agreement. Here is the link for you to review.

Client: Fine. Disappointed.

OR

You: Hi Nina, I saw you just late canceled your appointment. As you agreed when you became a client, the 4th time you late cancel we can no longer book you which really burns me out. I wish you all the best.

Client: WTF? You suck.

You: No response!

Biz Boundaries IRL

Situation

A brand asks you to make content for them for free.

No Boundary Response

Say yes even though you are angry.
Talk shit about the brand.

Healthy Boundary Response

Depending on your goals and objectives, you may or may not want to give a brand free content.

If you do want to provide free content, then be clear with the brand what you are willing to create for them, the timelines, and your expectations of the relationship.

If you do not want to create free content for them, you have every right to gracefully decline the offer.

Remember, not every "opportunity" is an opportunity.

Also remember, for some, exposure is valuable. For others, it's insulting.

The Conversation

Before you respond, get clear on what outcome you are seeking. Be clear, kind, and firm.

Brand: Hi Nina, we love your Instagram and would like to see if you are interested in making content for us?

You: OMG thank you, that means so much to me. Clearly, I love your brand and what it stands for. Can you give me some more details such as the type of content, the frequency, your expectations, and budget?

Brand: Well, we do not have a budget but we have a ton of followers and you will get so much exposure.

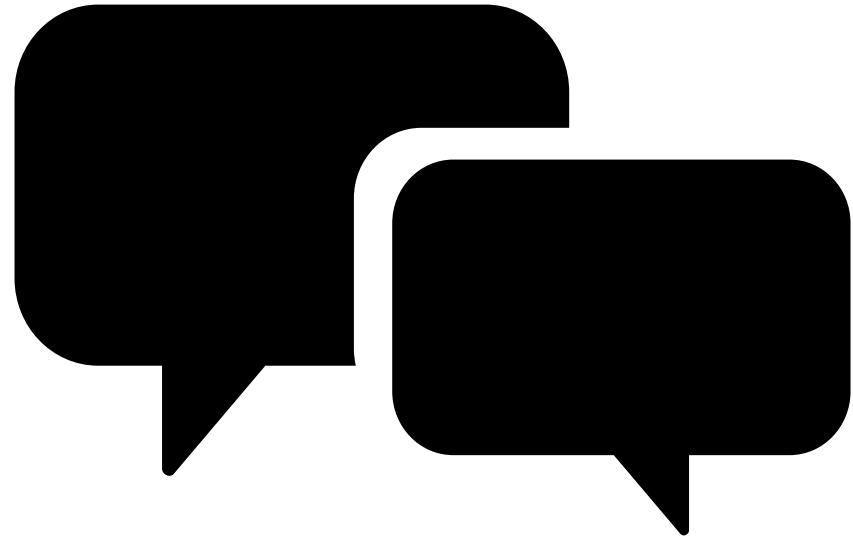
You: I am so grateful for the offer and understand that some artists want and need exposure. That is not the case for me. If anything changes, please let me know. Thank you again for thinking of me.

OR

You: I understand. While I cannot commit to a specific amount of content, I am happy to send you some stuff from time to time. Thank you for the opportunity.

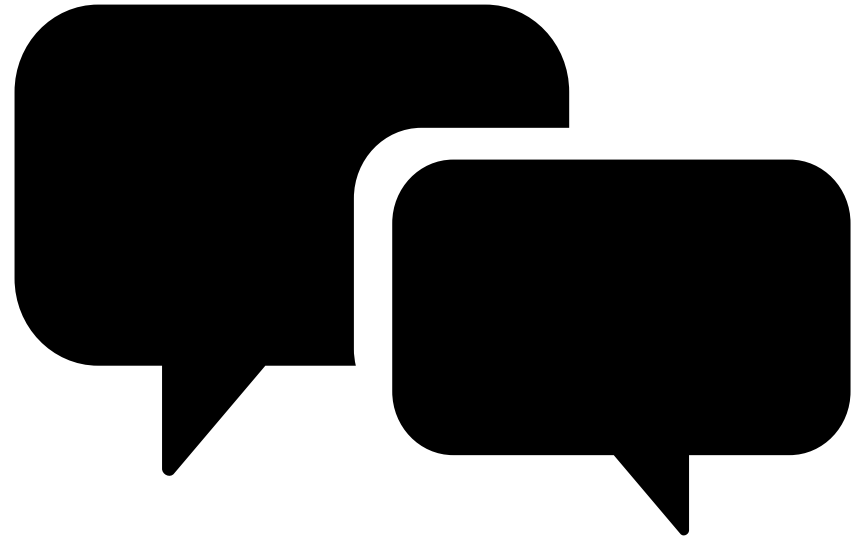
OR

You: I understand. I work best with clear guidelines and expectations. When you have more information, I am happy to chat. Thank you!



System and Process for Sharing Agreements with Your Team or Tenants

- Incorporate Relevant (or all) Agreements into the Interview Process**
- When you decide to hire or engage in a lease, meet face to face to walk through Agreements**



System and Process for Sharing Agreements with Your Team or Tenants

Ask Questions

Are you comfortable with _____?

Do you see value in _____?

Are you open to _____?

How will you feel if _____?

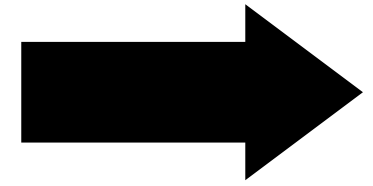
What does _____ mean to you?

“

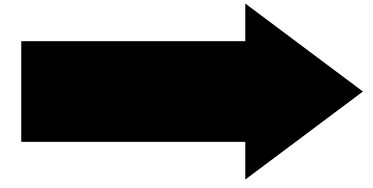
Systems fail way more often than people do.

Change the system, change the result.

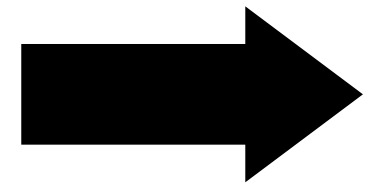
Next Steps



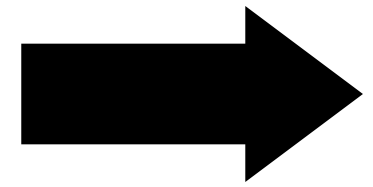
Review your current Agreements to identify areas you can better align them



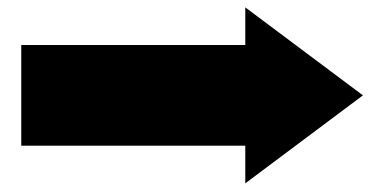
If you do not have Agreements, reserve time with yourself to create them



Check on the process of communication on how your Agreements are seen, understood, and actually agreed upon



Pay attention to red flags like client no-shows, late cancels, and team discourse to see if there are ways to make your Agreements even more clear



Come to our Facebook group with any issues you have so we can support you!

Other **Resources** In A School

Brand Storytelling: Your Content Is Your Marketing





what you will learn
Provide insights and clarity into the alignment of brand storytelling and online and offline content including client + team agreements and more to help simplify your process.

workshop materials
Workshop PDF, Awesome Client Agreements Framework, Brand Story Framework, Brand Content Framework, Decision Making Framework, Awesome Team Handbook Template

BRAND STORYTELLING: YOUR CONTENT IS YOUR MARKETING

Added 3 months ago

The Awesome Client Journey Online and Off Workshop





what you will learn
Provide insights, systems and tools to ensure your online and offline client care and communications are aligned with your brand purpose, promise and people.

workshop materials
Workshop PDF, Awesome Client Journey Maps

THE AWESOME CLIENT JOURNEY ONLINE AND OFF

Added 5 months ago

My AwesomeAF Healthy Boundary Handbook





what you will learn
the why, what + how of healthy boundaries for your business, brand, and life.

materials
Handbook, Conversation Cards, Wallpaper

MY AWESOMEAF HEALTHY BOUNDARY HANDBOOK

Added 8 months ago



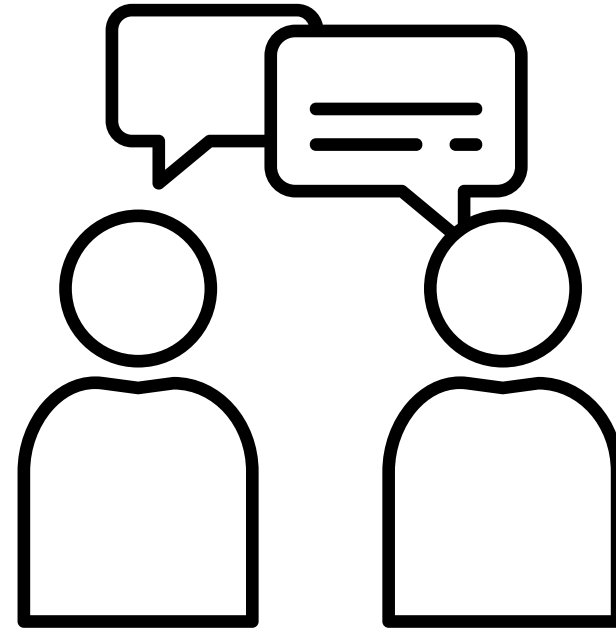
Aligning Your Team + Your Brand Story

Workshop

ALIGNING YOUR TEAM + BRAND STORY WORKSHOP

Added 2 years ago

The Awesome Team Handbook Template is in all of the above Workshops
Our Facebook group is a good place to bring these discussions also!



If you need more **individual support**, please consider reserving a One On One Session

passionsquared.net/coaching

Other **Resources** Outside of A School

Employment Attorney In Your State/Country
for the legal part of both employee and tenant Agreements

Legal Zoom

legalzoom.com/forms



Client, Team and Tenant Agreements Workshop

Topic

**Creating simple, clear, focused,
seamless agreements**

Teacher

Nina L. Kovner

Intention

**Provide frameworks and
processes to ensure your
agreements are aligned with your
brand, vision, and values along
with simplifying your
communications**