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### SCRIPT - On Site / Verbal Conversation for pre - quoted jobs. (After Scoping)

YOU'VE JUST FINISHED WALKING THROUGH THE JOB.  
HERE'S THE FLOW, USING YOUR TONE:

#### VERSION 2 – NO DEPOSIT, PAYMENT ON COMPLETION

**“Really looking forward to working with you on this.**

**From here, our team will send you through a summary of what we've discussed along with the pricing, just to confirm everything's exactly as you want it.**

**Once the work's complete and we've done a final walk-through, it's payment on completion.**

**If anything needs tweaking between now and then, just sing out.”**

**Simple. Clean. Done.**

### BACKUP EMAILS - Scenario 1 (Pre-Quoted Work)

#### EMAIL 1 – SCOPE CONFIRMATION (SENT AFTER SITE VISIT)

**Subject: Confirmation of Scope – [Project Name]**

**Hi [Client Name],**

**Great to meet with you today — really looking forward to getting this underway.**

**As discussed, here's a summary of the scope so we're all aligned:**

- **[Bullet point summary of work]**
- **[Key inclusions]**
- **[Any exclusions if relevant]**

**Total investment: \$[amount] + GST. ( Full Quote & Terms of Trade attached )**

**Have a read through and let us know if there's anything you'd like adjusted or clarified.**

**Once confirmed, we'll lock in scheduling and move to the next step.**

**Cheers,**

**[Name]**

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### BACKUP EMAILS -

#### Scenario 1

(Pre-Quoted Work)

#### EMAIL 2 – DEPOSIT INVOICE (IF APPLICABLE)

**Subject: Deposit Invoice - [Project Name]**

Hi [Client Name],

We're all set to move forward.

Attached is the deposit invoice to secure your booking and lock in scheduling.

Once this is processed, we'll confirm start dates and keep you updated as we move through the timeline.

Let us know if you need anything in the meantime.

Thanks,

[Name]

### BACKUP EMAILS -

#### Scenario 1

(Pre-Quoted Work)

#### EMAIL 3 – COMPLETION + PAYMENT ON COMPLETION (IF YOU HAVE NOT TAKEN PAYMET ON THE SPOT - ALWAYS PREFERRED )

**Subject: Work Complete - [Project Name]**

Hi [Client Name],

The work's now complete and ready for final walk-through.

We're so pleased to have been able to get this all sorted for you.

Attached is the final invoice. As discussed, payment is due on completion.

Please let us know if you have any questions.

Appreciate the opportunity to work with you.

[Name]

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## Scripts, Templates & Bonuses

# Additional Scripts and E-Mail Prompts & Bonus Resources

“One size does NOT fit all.”  
You can't treat every job  
THE SAME

Milestone / progress payments is where this gets  
commercially powerful.

Because this is where:

- Margin sits at risk
- Cashflow pressure creeps in
- Businesses accidentally finance projects
- And relationships get strained at the back end

### SCENARIO: Progress / Milestone Payments

This applies to:

- Construction
- Landscaping
- Engineering
- Fit-outs
- Manufacturing installs
- Multi-week or multi-month jobs

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The key principle here:

You don't "ask" for milestone payments.  
You build them into the rhythm of the job. **VERBAL SCRIPT –  
During Scope / Planning**

This is said while walking through staging.

### Version 1 – Structured and Confident

“Because this is a staged project, we break payments into milestones so the cashflow tracks with progress.

So the way this works for our customers is:

- Deposit to secure scheduling and materials
- Progress payment once [stage 1] is complete
- Next milestone at [stage 2]
- Final payment on completion

That way there are no surprises for either of us and everything stays aligned as we move through.”

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### Version 2 – Slightly Softer but Still Commercial

“Given the size of this project, we structure it in stages.

We’ll take a deposit upfront, then invoice at agreed milestones as we move through the build.

It keeps everything flowing properly.

Final payment is on completion once everything’s signed off.”

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### EMAIL 1 – Scope + Milestone Breakdown

Subject: Project Staging & Payment Structure – [Project Name]

Hi [Client Name],

Great to walk through this with you.

As discussed, this project will be delivered in stages. Here's how the structure will work:

Stage 1 – [Description]

Stage 2 – [Description]

Stage 3 – [Description]

Payment Schedule:

- Deposit: \$[amount]
- Milestone 1: \$[amount] upon completion of [stage]
- Milestone 2: \$[amount] upon completion of [stage]
- Final balance on completion

This structure ensures progress and payment stay aligned throughout the project. Please see full scope of work and terms of trade attached.

Let us know if you'd like clarity on any part of this before we move to scheduling.

Regards,  
[Name]

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### EMAIL 2 – Milestone Trigger

Subject: Milestone 1 Complete – Invoice Attached

Hi [Client Name],

Stage 1 is now complete as outlined.

Attached is the milestone invoice in line with the agreed structure.

We'll continue progressing into Stage 2 once this milestone is processed.

Let us know if you'd like to walk through anything.

Thanks,  
[Name]

Short.  
Clear.  
Professional.

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### EMAIL 3 – Final Completion

Subject: Project Complete – Final Invoice

Hi [Client Name],

We're now complete.

Attached is the final invoice in line with the agreed milestone structure.

We're so pleased of how this has come together and appreciate the opportunity to deliver it with you..

Regards,  
[Name]

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### EMAIL 4 – Light Follow-Up (If Milestone Not Paid)

Subject: Quick Check – Milestone Invoice

Hi [Client Name],

Just checking in regarding the milestone invoice sent through on [date].

As agreed, we pause progression at each stage until the relevant milestone is processed.

Once payment's through, we'll continue into the next phase.

Let us know if anything needs clarifying.

Thanks,  
[Name]

### Why This Is Powerful

The difference between:

“Please pay us”

and

“We progress once the milestone is processed”

Payment becomes part of momentum.

That's the same mindset shift your service client made — just at a larger commercial scale.

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# RECURRING SERVICES VERSION

*(Monthly cleaning, maintenance, lawn care, servicing, retainers, etc.)*

## Verbal Script – When Setting Up Ongoing Work

“Because this is ongoing work, we invoice monthly in advance.

It keeps everything simple and predictable for everyone.

You’ll receive your invoice at the start of each month, and once it’s processed we continue as scheduled.

If anything changes in scope, we’ll adjust before the next cycle.”

Notice:

- Predictable
- Process-based

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### Setup Email

Subject: Ongoing Service Structure

Hi [Client Name],

Great to get this underway.

As discussed, this service runs on a monthly cycle. Invoices are issued at the beginning of each month and payment secures the scheduled work for that period.

If scope or frequency changes at any point, we'll review and adjust accordingly before the next cycle.

Looking forward to working together.

[Name]

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### If Payment Not Received

Subject: Quick Check – Monthly Service Invoice

Hi [Client Name],

Just checking in regarding this month's invoice.

As outlined, work continues once the monthly cycle is processed.

Let us know once it's through and we'll keep everything moving.

Thanks,  
[Name]

Clear structure. No chasing tone.

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# PROGRESS / MILESTONE VERSION

*(Larger staged projects — construction, landscaping, fit-out, engineering)*

### Verbal Script

“Because this project runs in stages, payments track with progress.

We take a deposit to secure scheduling and materials.

Then invoice at agreed milestones as each stage is completed.

Final balance is due on completion once we’ve walked through everything together.

That way, progress and payment stay aligned.”

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### Milestone Trigger Email

Subject: Stage 2 Complete – Invoice Attached

Hi [Client Name],

Stage 2 is now complete in line with our agreed scope.

Attached is the milestone invoice.

We'll continue progressing once this stage is processed.

Let us know if you'd like to review anything.

[Name]

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### Light Pause on Work ( stop work ) Email

Subject: Milestone Invoice

Hi [Client Name],

Just confirming receipt of the milestone invoice sent on [date].

As agreed, we pause progression at each stage until payment is processed.

Once through, we'll move into the next phase.

Thanks,  
[Name]

This is where commercial confidence shows.

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# EMERGENCY / CALL-OUT VERSION

*(Urgent jobs, reactive work, breakdowns, flood damage, urgent repairs)*

Emotion could be higher here. So clarity must be immediate.

### ON-THE-SPOT SCRIPT – Before Starting Work

This is said immediately once you've assessed urgency.

“We can get started straight away.

Because this is emergency call-out work, there is a call-out fee and a minimum hourly charge. That covers getting here and the initial time on site.

Also - If there is a pre-diagnostic required that is also part of our charges. That's the time it takes for us to properly assess what's going on and work out the best plan of attack.

Once we know what we're looking at, I'll talk you through it. At that point, you can decide whether you'd like us to pre-quote the repair or just get on with it and we'll send the bill.

For call-out and after-hours work, payment may be due on completion.”

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### SHORTER VERSION (If Time Is Tight)

Sometimes you're in a high-pressure situation.

Here's the condensed version:

“Just so you know upfront — this is emergency call-out work, so there's a call-out fee, minimum hourly charge, and diagnostic time is chargeable.

Once we know what we're dealing with, I'll explain the options — we can either pre-quote the repair or just get on with it.

Payment is due on completion today.”

Done.

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### TEXT MESSAGE BACK-UP (Sent Immediately After Verbal)

This is important. Written confirmation reduces friction later.

#### Text Message Example

Hi [Name],

Confirming today's emergency call-out:

- Call-out fee applies
- Minimum hourly charge applies
- Diagnostic time is chargeable
- Repair work can either be pre-quoted or completed on instruction
- Payment due on completion today

Let me know if you'd like anything clarified before we proceed.

That message is powerful.

It protects:

- Cash flow
- Expectations
- Relationship

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### AFTER DIAGNOSTIC – SCRIPT

Once you know what's going on:

“Okay, here's what we're looking at.

The issue is [brief explanation].

To repair it properly, we'll need to [outline work].

At this point, you've got two options —  
we can pause here and I'll pre-quote it for you,  
or we can get on with it and I'll invoice the additional  
time and materials once we're done.

What would you prefer?”

That last line gives control.

Control reduces resistance.

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### COMPLETION SCRIPT (On Site)

“All sorted.

I'll send the invoice through now — as mentioned, payment (with either your minimum charges if you can't invoice in full or if you can - the full invoice) due on completion for call-out work.

Once that's processed, we're all wrapped up.”

### COMPLETION EMAIL

Subject: Emergency Call-Out – Invoice

Hi [Name],

Today's emergency call-out work is now complete.

Invoice includes:

- Call-out fee
- Minimum hourly charge
- Diagnostic time
- Labour and materials

As discussed, payment is due on completion.

Appreciate the opportunity to resolve this quickly for you.

[Name]

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### IF PAYMENT NOT MADE ON SITE

Subject: Call-Out Invoice – Today

Hi [Name],

Just confirming the invoice for today's emergency work.

As outlined prior to commencement, payment is due on completion for call-out and after-hours work.

Please confirm once processed.

Thanks,  
[Name]

Short.  
Professional.  
Not emotional.

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### THE MINDSET SHIFT BEHIND THIS

Emergency work carries premium structure because:

- You drop everything.
- You absorb scheduling disruption.
- You respond immediately.
- You carry risk.
- You carry labour cost instantly.

There is nothing unreasonable about same-day payment.

The mistake businesses make is:  
They feel awkward saying it.

But clarity here actually increases trust.

Because in a crisis, people want certainty.

Structure = certainty.

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# “20th of the Month” RESET

## The Staged Transition Model

### Foundation

When we talk about moving away from 20th of the following month — or any long-tail payment structure — it’s important to note: This is not likely to be a simple ‘switch of a button’.

You don’t wake up tomorrow and say,  
“Everything is payment on completion.”

That’s not realistic.

What we’re doing instead is this:

We are becoming open-minded to where we actually have more control than we think.

You will know in your business:

- Where you can get prepayment
- Where you can shorten payment terms
- Where you can invoice faster
- Where payment on receipt makes sense
- Where milestone payments are reasonable
- Where call-out or urgent work should never sit in a 20th cycle

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This is about staged transition.

It's about taking one step at a time.

Not flipping the entire structure overnight.

### The Commercial Insight

The 20th of the month culture didn't appear because it's the best system.

It appeared because it is inherited infrastructure & it could be convenient for batching

But batching creates lag.

Lag creates carryover.

Carryover creates working capital pressure.

And working capital pressure means:

You are funding delivery.

So instead of saying:

"We're abolishing 20th terms."

We say:

"We've taken the opportunity to review how we structure payment timing across our business."

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That's leadership language.

The Gradual Transition Strategy

This is where the real insight sits.

You don't change everything.

You change layers.

Layer 1 – Small Work

- Pre-quoted small jobs → payment on completion
- Smaller invoices → 7 days
- Call-out → same day
- After-hours → same day

Layer 2 – Medium Work

- Break into milestones
- Shorten terms from 20th to 10 days
- Align invoice issue dates to reduce carryover

Layer 3 – Larger / High-Risk Work

- Deposit required
- Milestone progression
- Pause work until processed

You don't fight the entire system.

You create progressive pockets of control.

That's a much smarter commercial move.

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### VERBAL RESET – RELATIONSHIP BASED

“Over the last couple of years, like most businesses, we’ve had periods where things have been tighter and we’ve taken the opportunity to review how we structure payment timing across different types of projects.

Historically we’ve aligned with the 20th of the following month ( or whatever is relevant to your environment ), but we’re now introducing some adjustments depending on the type and size of work.

For smaller or pre-quoted work, we’re moving to payment on completion or shorter terms.

Larger staged projects will continue to run with milestone payments.

It’s about keeping delivery and payment aligned rather than carrying long tail balances across months.”

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### EMAIL – STAGED TRANSITION

Subject: Payment Timing Update

Hi [Client Name],

Following a review of how we structure payment timing across our business, we're introducing some adjustments depending on the type and size of work.

Historically we've aligned with 20th of the following month.  
Moving forward:

- Smaller and pre-quoted work will move to payment on completion or shorter terms
- Call-out and after-hours work remains due on completion
- Larger projects will continue under milestone structures

This approach keeps delivery and payment aligned and reduces long tail carryover across months.

We value the relationship and wanted to give you clarity ahead of upcoming projects.

If you'd like to discuss how this applies to current work, happy to talk it through.

Regards,  
[Name]

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### IF THERE IS PUSHBACK

Here's the steady, confident response:

“We understand the 20th of the month cycles have historically been the norm.

For us - like many of our customers, aligning payment closer to delivery is important for how we look after resources across projects.

We're not necessarily changing everything overnight, but we are introducing shorter cycles where appropriate.

Let's look at where that makes sense within your current projects.”

This keeps the door open without stepping backwards.

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**The Deeper Commercial Insight** This isn't about forcing clients.

It's about noticing:

Where have you accepted long tail payment terms by default?

Where is there actually flexibility?

Where are you leaving your margin sitting at the back end?

Where could you invoice faster?

Where could you split work differently?

Where could you use deposits?

Where could you tighten seven days instead of 20th?

It's progressive control.

Not sudden shock.

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### The Psychological Shift

You're not saying:

"You're paying too slow."

You're saying:

"We're refining how we run our business."

That's leadership.

And leadership attracts respect.

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# GRADUATED TRANSITION ROADMAP

Moving Away from “20th of the Following Month” — One Layer at a Time

### Step 1: Awareness – Where Are You Carrying Payment Lag?

Start by mapping:

- Which jobs sit in 20th cycles?
- Which jobs are small enough not to?
- Where are you automatically defaulting to long tail?
- Where are outstanding invoices building up month to month?

It's about visibility.

You can't refine what you haven't seen clearly.

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### Step 2: Introduce “Pockets of Control”

You don't have to overhaul the whole system all at once .

You introduce controlled upgrades.

#### Tier 1 – Immediate Tightening (Low Resistance)

- Call-out & after-hours → payment on completion
- Pre-quoted small jobs → payment on completion
- Invoices under \$X → 7 days
- Invoice immediately on completion (not end of month batching)

These are your low-hanging fruit.

Little resistance.

Immediate cashflow impact.

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### Tier 2 – Structural Improvements (Medium Impact)

- Break mid-size projects into milestones
- Align invoice issue dates closer to delivery
- Shorten 20th terms to 7 or 14 days
- Reduce batching delays internally

Here's where you begin retraining expectations.

### Tier 3 – Strategic Shift (High Impact)

- Deposits on larger jobs
- Staged payment triggers
- Work pauses until milestone processed
- No new work with outstanding invoices

This is mature commercial positioning.

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### Step 3: Communicate It as Refinement, Not Reaction

Use language like:

“We’ve reviewed how we structure payment timing across different types of projects.”

Not Necessarily:

“Things have been tough.”

### Step 4: Apply Consistently

Inconsistency kills credibility.

If you tighten for one client and soften for another, you reinforce the old culture.

Consistency builds respect.

### Step 5: Review and Adjust

Every 3–6 months:

- Where has lag reduced?
- Where are outstanding invoices shrinking?
- Where is margin being protected earlier?
- Where can you tighten further?

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# DECISION TREE – Where Should You Start Tightening?

This becomes your practical tool.

Business owners answer these in order:

---

### Question 1

Is this job urgent, reactive, or after-hours?

→ Yes → Payment on completion

→ No → Go to Q2

---

### Question 2

Is this job pre-quoted and under \$X value?

→ Yes → Payment on completion or 7 days

→ No → Go to Q3

---

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### Question 3

Is this a staged project with materials and labour exposure?

→ Yes → Deposit + milestone payments

→ No → Go to Q4

---

### Question 4

Is this a long-standing B2B relationship currently on 20th terms?

→ Yes → Introduce shortened cycle on new or smaller work first

→ No → Default to shorter payment terms

---

### Question 5

Would delayed payment materially impact your cashflow if unpaid?

→ Yes → Deposit or milestone structure required

→ No → 7–10 day terms acceptable

## The Core Principle

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You're not trying to eliminate the 20th of the month overnight.

You're building commercial muscle.

You're building:

- Awareness
- Structured tightening
- Clear communication
- Confidence

One layer at a time.