



— CONSULTING / CLIENT MEETINGS

The Client Meeting Playbook

Score any client meeting on the six behaviors that decide whether it advanced the engagement or quietly gave work away, using the words people actually said.

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USE IN 30 SECONDS

Use this in 30 seconds. Open your last client meeting. Read the six criteria on page 3. Give each a 1 to 5 and write the quote that earned it. The two lowest are your next meeting's job, and any row 3 that hides an out-of-scope ask is money you are about to give away. That is the whole method.

To have talk2bud do it for you on every call from now on, see page 8.

Why a client meeting costs money before anyone opens the invoice

A consultant finishes a call, writes “good meeting, they’re happy, we’re aligned,” and three weeks later does eight hours of work nobody agreed to pay for. The meeting felt collaborative. Feeling collaborative is what a meeting does when you say yes to everything.

The leak is rarely the contract you signed. It is the sentence in the middle of a friendly call: “while you’re at it, could you also look at the blog?” Either you named that as a change and put a number on it, or you nodded and it landed on next month’s timesheet as unpaid work. That is observable. Either the extra ask got flagged out loud or it did not. Either a cost was said or it was swallowed. Either a decision got restated and confirmed or it became four different decisions by Thursday.

This playbook scores the six behaviors that separate a meeting that moved the engagement from a meeting that gave part of it away. It is written so a human can run it in ten minutes, and so talk2bud can run it on every call automatically.

WHAT MAKES THIS DIFFERENT FROM A CHECKLIST

A checklist asks “did you discuss scope?” and a consultant who said the word scope ticks the box. This scores what a 2 sounds like against what a 5 sounds like, with the phrasing, so two people reviewing the same call land on the same number. That is the only property that makes a rubric worth running twice.

Instructions

Analyze this as a consulting or agency client meeting. “You” is the consultant or agency; “Client” is the client. Score the call against the six criteria in the playbook below, giving each a 1 to 5 and quoting the line from the transcript that earned that score. Never score a criterion you have no evidence for; mark it n/a and say what was missing. Judge only what was said out loud, never intent, never tone you cannot hear in the words.

Flag every scope moment separately: mark each point where the Client asked for something new or changed something already agreed, and for each one, say whether You named it as out-of-scope, put a cost or a trade-off on it, and got a decision on the call. Where a score is 3 or below, write the exact line You should have said instead, in Your own register.

What this lens is for

A working meeting on a live engagement: a status call, a check-in, a review, a kickoff. A good client meeting ends with last week's commitments closed or owned, every new request either scoped or parked with a price, the decisions restated, and a dated next step with names on it. It does not end with a warm "we're all aligned" and a pile of quiet new work.

How to read the call

- Read once end to end before scoring anything. First-pass scoring rewards the warm moments.
- Mark every point where the Client adds work or widens something: "also," "while you're at it," "one more thing," "can you just," "it'd be great if."
- For each of those, check three things in the next minute: did You name it as a change, did You put a cost or trade-off on it, did a decision get made out loud.
- Note every number anyone said: hours, money, dates, headcount.
- Check the last two minutes separately. Most client meetings lose the next step there, not in the middle.

The criteria

1 The meeting was framed and the frame was agreed

LISTEN FOR: In the first few minutes, You say what this call is for, ask what is missing, and confirm the time. The frame is where the boundary of today's work gets set.

SCORE	SOUNDS LIKE
1-2	No frame. Straight into "so, where are we?" and wherever the Client steers.
3	A frame stated but not agreed. "I thought we'd cover the draft and the timeline," then moves on without pausing for what the Client wants to add.
4-5	Purpose, gap, and time. "Three things today: the draft, the timeline, and one new request I want to size with you. Anything to add? And I have you till the hour, still?"

QUOTE: The first thing You said after the greeting.

2 Last meeting's commitments were reviewed before new business

LISTEN FOR: You open on the open items from last time, by owner and status, before anything new starts.

SCORE	SOUNDS LIKE
1-2	Straight into new business. Last week's promises are never mentioned.
3	A vague gesture at progress. "Things are moving along on our end." No item, no owner.
4-5	The open loop, named and closed. "Before anything new: the two items from last week. The draft is done; the API access is still open on your side. Right?"

QUOTE: The first item from a prior meeting that got reviewed, or note that none did.

3 A new or changed ask was named as out-of-scope, out loud

LISTEN FOR: When the Client adds work or widens the ask, You name it as a change against the agreement rather than absorbing it silently. This is the criterion scope creep lives or dies on.

SCORE	SOUNDS LIKE
1-2	The ask is absorbed with a reflex yes. “Sure, we can fold that in.” Nothing marks it as new.
3	A hesitation with no label. “Oh, um, yeah, I can probably take a look at that too.” It is neither refused nor scoped.
4-5	The ask is named as a change on the spot. “Quick flag: the blog migration is new, it wasn’t in the statement of work, so let’s treat it as a change, not a freebie.”

QUOTE: Every sentence where the Client added or widened work, and what You said next.

4 The cost of the out-of-scope ask was made visible and the decision handed back

LISTEN FOR: For each new ask, You say what it costs (hours, timeline, fee) and give the Client a real choice, so the trade-off is theirs to make.

SCORE	SOUNDS LIKE
1-2	A silent yes, or a flat “sure, no problem.” No cost is spoken; it appears on the invoice later, or never.
3	Reluctance without a number. “That’s a bit of extra work, but we’ll see what we can do.” No figure, no options.
4-5	A cost and a choice. “That’s about six hours. I can quote it separately, or swap it for the newsletter build we’d planned. Which works for you?”

QUOTE: The first sentence that put a number or a trade-off on a new ask, or note that none did.

5 Decisions were stated back and confirmed

LISTEN FOR: Each decision restated in plain terms and agreed out loud, so it does not become four different memories by Thursday.

SCORE	SOUNDS LIKE
1-2	“Great, sounds good.” Nothing is read back; everyone leaves with a slightly different version.
3	One decision confirmed, the rest assumed. “So we’ll go with option B,” then straight on, with three other open threads left hanging.
4-5	The decisions read back as a set and confirmed. “So we’re agreed: ship the draft Friday, blog migration becomes a change order, newsletter slips a week. Yes?”

QUOTE: The read-back line, or note that decisions were left implied.

6 Owners, dates, and a next step were set on the call

LISTEN FOR: Every action assigned to a named person with a date, and the next meeting booked before the call ends.

SCORE	SOUNDS LIKE
1-2	A vague forward promise. "I'll send some times and we'll go from there."
3	Actions without owners, or a next step without a date. "We'll circle back on this soon."
4-5	Owners, dates, and the next step, all on the call. "You send the API keys by Tuesday, I send the change order today, we meet Thursday at ten to sign off. Booked."

QUOTE: The last thing agreed before the goodbye.

Scoring

Score each criterion 1 to 5. Mark n/a where the transcript gives you nothing, and say what was missing rather than guessing. Report the average across the criteria you could score, to one decimal place, and report the scope tally separately: how many new asks came up, and how many were named, priced, and decided on the call.

- **4.0 and up, and every new ask scoped.** The meeting advanced the engagement. Send the recap and the change orders.
- **3.0 to 3.9.** Progress with leaks. Name the two lowest criteria; those are the next meeting.
- **2.0 to 2.9.** A friendly call that decided little. Nothing scoped, nothing dated.
- **Below 2.0.** The meeting cost you. Rebuild the frame and the follow-up habit before the next one.

A high average with a 1 on criterion 3 or 4 is not a good meeting. It is a meeting where you gave work away pleasantly. Say so plainly.

Red flags

- **The pleasant yes.** Every new request is met with “sure, no problem,” and no number is ever said.
- **The buried ask.** A widening request slips by in a sidebar and never gets named as a change.
- **Happy alignment.** You describe the call as aligned while no decision was read back and no date was set.
- **The silent invoice.** Extra work is agreed to and only surfaces later, on a timesheet the Client never approved.
- **The vague next step.** The call ends on “I’ll send some times” instead of a booked meeting.

How to report

- Open with the average score, the strongest criterion, and the weakest one. One sentence each.
- Under scope: list every new or changed ask, whether it was named, priced, and decided, and the running total of unscoped work if any slipped through.
- Under what went well: each criterion scoring 4 or 5, with its number and the quote that earned it.
- Under what to improve: each criterion scoring 3 or below, with its number, the quote that cost it, and the exact line to use next time.
- Under decisions: only what was actually decided on the call, in the speakers’ own terms.
- Under action items: the owner, the commitment, and the date, plus any change order to send.

Coaching notes

- Work one criterion at a time. Someone asked to fix six things fixes none.

- The order that compounds fastest: 3, then 4, then 6. Naming a change is a reflex you can build, pricing it is a skill, and booking the next step is a habit.
- If criterion 3 or 4 scores low across four meetings with the same client, it is not a meeting problem, it is a contract problem. Renegotiate the statement of work, not the next agenda.

Roll it out in 30 days

- **Week 1 – pilot.** Score your own last five client meetings. Do not change how you run them yet; just get a baseline and see which criterion is your weakest.
- **Week 2 – calibrate.** Have one colleague score the same two meetings you did. Where you disagree by more than a point, the anchor text is doing its job: argue it to the quote, not to the adjective.
- **Week 3 – roll out.** Run every client meeting through the rubric for a week. Report the scope tally to yourself each Friday: asks raised, asks scoped.
- **Week 4 – review.** Look at the trend, not the averages. If criterion 3 or 4 is still low with one client, the fix is the contract, not the coaching.

Run this on every call

You do not want to score meetings by hand forever. talk2bud captures the client call from your Mac's system audio, with no bot joining the meeting, reads the transcript against this exact rubric as a Lens, and hands back the six scores with the quote that earned each, plus every scope moment flagged. No hidden bot is not the same as recording in secret, so you still tell the room you are capturing the call and keep the consent the app makes explicit. Import the Lens file that ships with this playbook, point it at your last call, and read the score. </content>



Run this as a Lens in talk2bud

Scoring one call by hand takes ten minutes. Scoring every call takes a program nobody sustains past week three. talk2bud records the call, transcribes it, and reads it back through this exact playbook, quoting the lines that earned each score.

- 1 Download **talk2bud-lens-client-meeting-scoring-rubric-v1.0.md** from the article this came with.
- 2 In talk2bud, open **Modes**, switch to **Call lenses**, press **New**.
- 3 Name it **Client Meeting Review**, then paste the file's **Instructions** section into the **Instructions** field.
- 4 Under **Playbook**, press **Import file...** and pick the same file. Save.
- 5 Before you analyze your next call, pick this lens. The read comes back scored against these criteria.

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Running this with a team? The same file imports into **Channel settings** → **meeting type** → **Playbook** with the **Import document** button. Every call of that type then gets the same read, so the scores compare across people instead of across moods.