



Red Flag vs. Unmatched Client Worksheet

Use this worksheet to reflect on past or current client interactions. It will help you distinguish between a mismatch in services and truly problematic behavior.

Section 1: Understanding the Difference

- ♦ An '**Unmatched Client**' is someone whose needs or budget don't align with your services, but who isn't disrespectful or harmful.
- ▲ A '**Red Flag Client**' exhibits behavior that disrespects your boundaries, drains your energy, or puts your safety or business at risk.

Section 2: Client Reflection Checklist

? This client... (check all that apply)

- ☐ Frequently cancels or reschedules last-minute without regard for your time
- ☐ Pressures you for discounts or lower pricing
- ☐ Ignores or questions your written policies
- ☐ Makes vague or constant complaints without clarity
- ☐ Displays controlling or invasive behavior (e.g., constant monitoring, micromanaging)
- ☐ Makes personal remarks or crosses professional boundaries
- ☐ Refuses to secure pets or creates an unsafe work environment
- ☐ Has expectations that exceed what was agreed upon in writing

Section 3: Interpretation

✓ If most boxes are unchecked, the issue may be a mismatch—not malice. You can use scripts, boundary-setting tools, and onboarding processes to correct it.

▶ If many boxes are checked, this client may be draining your business and your peace. Trust yourself—it may be time to exit professionally.