

Client Journey

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Contact Points

Initial Contact	Initial Interaction	Check You Out	Next Step Follow Up	First Meeting	Meeting Follow Up
Google, existing client referral, professional introducer referral, lead generation company, other?	Email, telephone, social media, face to face	Google, website, social media	Email, post, telephone, social media	Your office, their office or home, Skype	Is it meaningful and valuable? Or is it just compliant? Could you create something that is both?
What impression is created? How could you positively influence the impression that is created?	What words do you use? What impression do you create?		Welcome book Welcome pack Make it good and make it safe Clear communication	Do you control the environment? Music, Flowers Positive media articles Meet at the car (with umbrella if wet) Named parking space Receptionist greet by name (you're expected) Name on screen in office (Welcome Mr and Mrs XYZ) Interesting questions What do they leave with? What's the feeling you've created?	

Discovery/ Fact Finding	Strategy Preparation	Strategy Presentation	Strategy Meeting Follow Up	Implementation Meeting And Onboarding Process	Annual Communication Strategy
Collecting the hard information (and further soft info) By post, face to face, or telephone assisted? Can they drop it off and you (or your team) will do it for them? Who does the fact find? (You? Paraplanner? Administrator?)	How long does this take? Why? How (and how often) do you communicate with clients during this process?	What are you communicating? How? Is there a standard storytelling process? (The hero's journey) Do you use cashflow modelling? (If not, why not?) Who drives the technology? What do they leave with? How do you make them feel?	Post, email, telephone? Is it meaningful and valuable? Or is it just compliant? Could you create something that is both?	Completing paperwork (face to face or via email/post?) Communication strategy (who's responsible? frequency?) Final completion phone call Welcome letter/email/gift	Blogs (weekly, fortnightly, monthly) Client events Phone calls to top clients Team news updates (make it personal) Annual review meetings focused on "is everything going to be alright?"