



## THE STARTING LINE: CLIENT JOURNEY

You want to build the firm of your dreams – so why start with a focus on the client's journey?

**Here's the thing:** your firm is a business, and your business exists to solve a problem for people who will value the solution you provide, and pay you well to do it. The happier those people (your clients) are with their experience and the value you deliver, the more willing they are to be repeat clients, refer other great clients to you, and be protective of you (for instance, by **not** sending you terrible clients).

**If you don't have clients who are paying you well and thrilled with your service, you CANNOT have the firm of your dreams.** Simple as that.

So, we start with the client's journey, even before they know they're on a journey with you. We want to understand what the client's interaction with your firm looks and feels like before they are a potential client (they're just a member of the community) → to their experience as a potential client → then as a client receiving your services → and as a raving fan, the very best way for other "perfect fit" clients to find you.

Once we get the client journey right (or at least headed in the right direction), we can start to think about the other pillars of your dream firm – a thriving team, strong community and outsized results.

### ***But first, a reality check.***

Before we can take action to create a brilliant client journey, we need to get clear on what's actually happening today. No filter, no sugar-coating, just today's honest reality.

Use the worksheet on the following pages to document your current client journey, warts and all. In fact, pay special attention to the not-so-great spots, whether it's friction for the client or for you and your team, a missed opportunity to create delight, or misaligned expectations as to fees or timing. No one but you gets to see this worksheet – so you can be honest here.

### ***Next, a wish list.***

As you identify the potholes in your current client journey, you'll likely automatically start identifying solutions you can implement to fill in the gaps and smooth the rough edges. Capture those in the notes section at the bottom of the worksheet.

These fixes might be anything from simple tweaks to make better connections between different phases of the process, to replacing manual steps with new technology to create more professional client interactions, to adding new steps in the process where none existed before. Don't be afraid to dream big, even if you aren't ready to make the big changes just yet. The point here is to see where you have room for improvement, and think about what the best version of your client journey could look like.

### ***And then, you execute.***

Take the wish list you created, and put it into the final page of the worksheet: the Stack Rank. For each item on the list, rate its impact, effort to implement, and cost, then multiply to arrive at a ranking score. Stack rank the items from highest to lowest score, and you have your marching orders. As you work through the list, **don't forget to celebrate** the wins you're creating – for your clients and ultimately for your journey toward the firm of your dreams.  
**Cheers!**



## CLIENT JOURNEY WORKSHEET

### INSTRUCTIONS

**Summary:** Use the Client Journey Worksheet to identify what each party is experiencing, and opportunities to improve those experiences, on the client's journey from community member to potential client, client, and then raving fan.

**Client Journey Worksheet Stage Definitions** (from left to right starting in the 2<sup>nd</sup> column):

- **Awareness:** the potential client becomes aware of your firm (perhaps through an event, speaking engagement, blog post, social media, or recommendation from a friend)
- **Pipeline:** the start of the sales process, when the potential client discovers a need for your services and explores whether you are a good fit (may include an informal introductory conversation or a more formal meeting to discuss the potential client's needs)
- **Propose + Engage:** at this stage, you're proposing to perform services for the client, and the client decides whether to engage you (may include a simple engagement letter, or a defined scope of work and fee)
- **Client Onboarding + Care:** this stage includes the steps you take to set expectations for the client, set the client up in your systems, and take any other steps necessary so that the service delivery stage can begin; it also includes any "client care" aspects of the client journey, which might occur at various points in the timeline
- **Service Delivery + Invoicing:** in this phase, you are delivering the work for which the client has engaged you. Also capture details regarding invoicing, which might occur at one or more points in your client journey, depending on your model – make a note of the following: (i) at what point does the client know the fee for the work? (ii) at what point(s) does the client receive an invoice and pay the fee? (iii) how easy (or difficult) is it for the client to review, understand, and pay the invoice?
- **Post-Service Delivery:** this stage includes any aspect of the client's experience that occurs after you have delivered the service (may include asking for referrals, service experience surveys, NPS®)

#### Exercise:

- **Analyze the Existing Client Journey.** Complete the Client Journey Worksheet for each phase (starting with the second column from the left), following the prompts in the first column on the left. Remember that you are documenting your existing client journey, and not an ideal or future-state journey.
- **Identify Opportunities to Improve.** In the Notes section at the bottom, identify areas for improvement and capture other notes (such as examples of great client experiences you've delivered or from other companies and industries).
- **Stack Rank to Prioritize and Execute.** After completing the Client Journey Worksheet, move on to the Stack Ranking Worksheet, to prioritize your opportunities for improvement. Use the Stack Ranking Worksheet to rate each item with respect to impact, effort to implement, and cost, then multiply to arrive at a ranking score. Items with the highest scores are the first things to address to improve your Client Journey.

CLIENT JOURNEY WORKSHEET



Client Journey	Awareness →	Pipeline →	Propose + Engage →	Client Onboarding + Care →	Service Delivery + Invoicing →	Post-Service Delivery
Describe the client's experience.						
Describe the team's experience.						
System(s) used						
Roles involved (or point person)						
Where is the friction in the system or process?  Does the friction impact the client or the team?						
Pain level 1-5						
Notes + Opportunities to Improve:						

