

CLIENT Service Model

Use the grid below to define client tiers, criteria to qualify for each tier and the services provided. Only use as many spaces as you need (less is better). One client profile is a business best practice, but as firms grow and expand, multiple client profiles and service levels may be appropriate. If you've filled in every section of this worksheet, it is likely time to take a deeper look at your clients, capacity, service and profitability.

TIER	TIER CRITERIA: SERVICES:		
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CLIENT SERVICE MATRIX

Service
Frequency

BY CLIENT TYPE

	Tier 1	Tier 2	Tier 3	Tier 4	Tier 5
Services Provided					
Products Used					
Platform Used					

Number of Review Meetings Per Year					
Number of Experience Touchpoints Per Year					
Number of Event Touchpoints Per Year					
Number of Educational Touchpoints Per Year					
Other Touchpoints					



CLIENT SERVICE MATRIX

Client Type	January	February	March	April	May	June
Tier 1						
Tier 2						
Tier 3						
Tier 4						
Tier 5						



CLIENT SERVICE MATRIX

Client Type	July	August	September	October	November	December
Tier 1						
Tier 2						
Tier 3						
Tier 4						
Tier 5						

