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UPCOMING EVENTS



05.22-24 LEADERS EVEREST EVENT

06.03 PRODUCTIVITY VIRTUAL SUMMIT

UPCOMING COACHING CALLS



05.20 PERSONAL PEAK CALL W/ COACH LIZ

05.28 LEADERS OFFICE HOURS &
ACCOUNTABILITY COHORT



USE ZOOM Q&A FOR TODAY'S QUESTIONS



LEADERS

PEAK PRACTICE

COACHING CALL



This Month's Topic

A path of white cubes with arrows, one red cube with a plus sign. The cubes are arranged in a curved line on a blue background. One cube is red and has a white plus sign on it, while the others are white and have a dark blue arrow pointing right. The path starts from the bottom left and curves towards the top right.

REVISIONING YOUR
CX JOURNEY



CUSTOMER JOURNEY



Awareness



Interest



Consideration



Evaluation



Purchase



Service



Loyalty



Re-Purchasing

CUSTOMER EXPERIENCE



Advice



Support



Mind



Quality



Competence



HELP



Satisfaction



Service

What is CX?

Client Experience (CX): The overall perception a client has of your brand after interacting with your business across the touchpoints of your client journey. It's the sum total of how a customer *feels* through their journey with your firm, including the level of reliability, trust, and service, and overall satisfaction derived from the relationship with your firm.



CUSTOMER JOURNEY



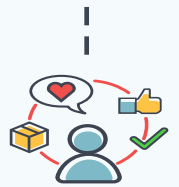
Awareness



Interest



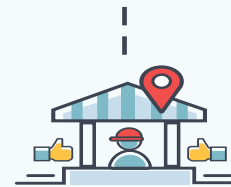
Consideration



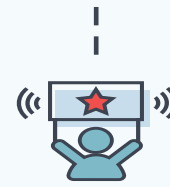
Evaluation



Purchase



Service



Loyalty



Re-Purchasing

1 Know your customers

The first step to delivering a great CX is to understand who your customers are, what they need, and what they expect from you. You can use various methods to collect and analyze customer data, such as surveys, feedback forms, reviews, social media, and analytics tools. You can also segment your customers into different groups based on their characteristics, behaviors, and preferences. This will help you tailor your products, services, and communication to each customer segment and create more personalized and relevant experiences.

2 Engage your customers

The second step to delivering a great CX is to engage your customers throughout their journey with your business, from awareness to advocacy. You can use various channels and platforms to communicate with your customers, such as email, phone, chat, social media, and website. You can also use various strategies and techniques to attract, inform, educate, entertain, and inspire your customers, such as content marketing, storytelling, gamification, and loyalty programs. The goal is to create a consistent and seamless CX across all touchpoints and build trust and rapport with your customers.

3 Empower your employees

The third step to delivering a great CX is to empower your employees to provide excellent customer service. Your employees are the face and voice of your business, and they have a direct impact on how your customers perceive and feel about you. You can empower your employees by providing them with the right training, tools, resources, and incentives to perform their roles effectively and efficiently. You can also encourage them to use their creativity, initiative, and empathy to solve customer problems and exceed customer expectations.

4 Measure your performance

The fourth step to delivering a great CX is to measure your performance and identify areas of improvement. You can use various metrics and indicators to evaluate how well you are meeting your customer needs and expectations, such as customer satisfaction, net promoter score, customer effort score, customer retention, customer lifetime value, and customer feedback. You can also use various methods to collect and analyze customer data, such as surveys, feedback forms, reviews, social media, and analytics tools. You can use the insights from these data to improve your products, services, processes, and policies and enhance your CX.

5 Innovate your offerings

The fifth step to delivering a great CX is to innovate your offerings and stay ahead of the curve. You can use various sources and methods to generate new ideas and solutions for your customers, such as customer feedback, market research, competitor analysis, brainstorming, prototyping, and testing. You can also use various approaches and models to implement and manage innovation, such as design thinking, agile, lean, and scrum. The aim is to create value for your customers and differentiate yourself from your competitors.

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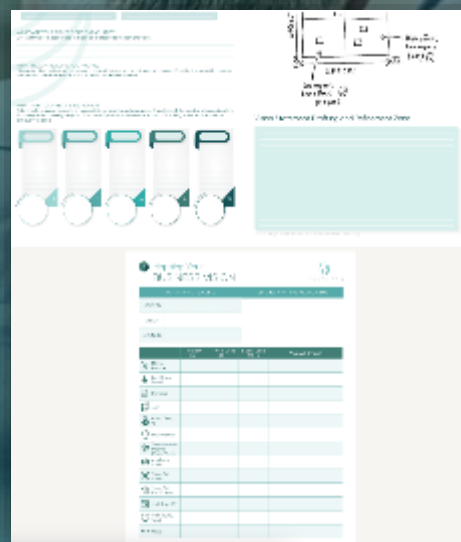
CLIENT PROFITABILITY TOOL



ENVISIONING YOUR FUTURE



MAPPING YOUR BUSINESS VISION



Line	Header	Revenue	Cost	Net	Net %	Profit	Profit %
1	Admin	25000	0	25000	100%	25000	100%
2	Office	5000	0	5000	100%	5000	100%
3	Tax Share	5000	0	5000	100%	5000	100%
4	Net Profit	35000	0	35000	100%	35000	100%

Address Name	Address	Address	Address	Address
100 Main	100	100	100	100
101 Main	101	101	101	101
102 Main	102	102	102	102

Line	Revenue	Cost	Net	Net %	Profit	Profit %
1	50000	20000	30000	60%	30000	60%
2	10000	5000	5000	50%	5000	50%
3	50000	25000	25000	50%	25000	50%
4	10000	5000	5000	50%	5000	50%
5	225000	112500	112500	50%	112500	50%

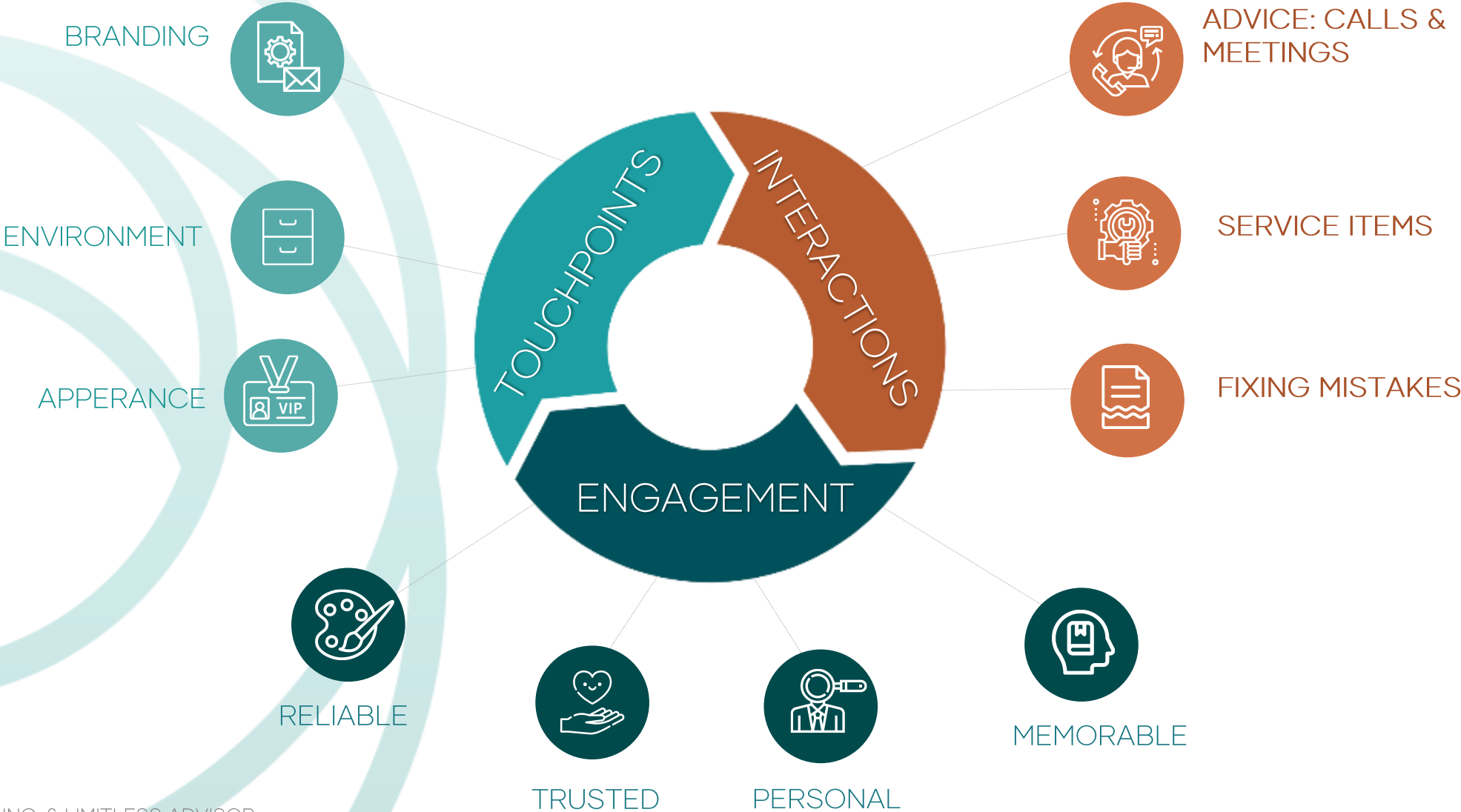
Line	Revenue	Cost	Net	Net %	Profit	Profit %
1	10000	5000	5000	50%	5000	50%
2	20000	10000	10000	50%	10000	50%
3	30000	15000	15000	50%	15000	50%
4	40000	20000	20000	50%	20000	50%
5	50000	25000	25000	50%	25000	50%

LEADERS MAY PRE-WORK



LIMITLESS Q&A

ELEMENTS OF CLIENT EXPERIENCE



WHAT YOUR CLIENTS EXPERIENTIALLY NEED FROM YOU

FEATURES

What distinguishes your productized service? What are covetable features that make you stand out?



BRAND ASSURANCE

What does your brand communicate about your behavior? How are you perceived?



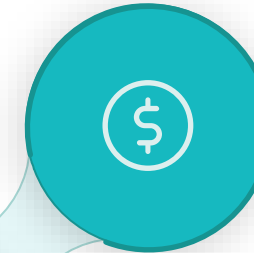
BENEFITS

What are the exact benefits that you and your team deliver to clients?



PRICING

How are you articulating your value to stay out of the fee debate?



RELATIONSHIP

How integrated is your CRM? Are you nurturing the partnerships with CPAs, trust attorneys and other COIs that are working with your future clients?



PRESENTATION

What are you giving, mailing, sending to tell your clients you know them? The physical stuff matters even more when virtual is primary.

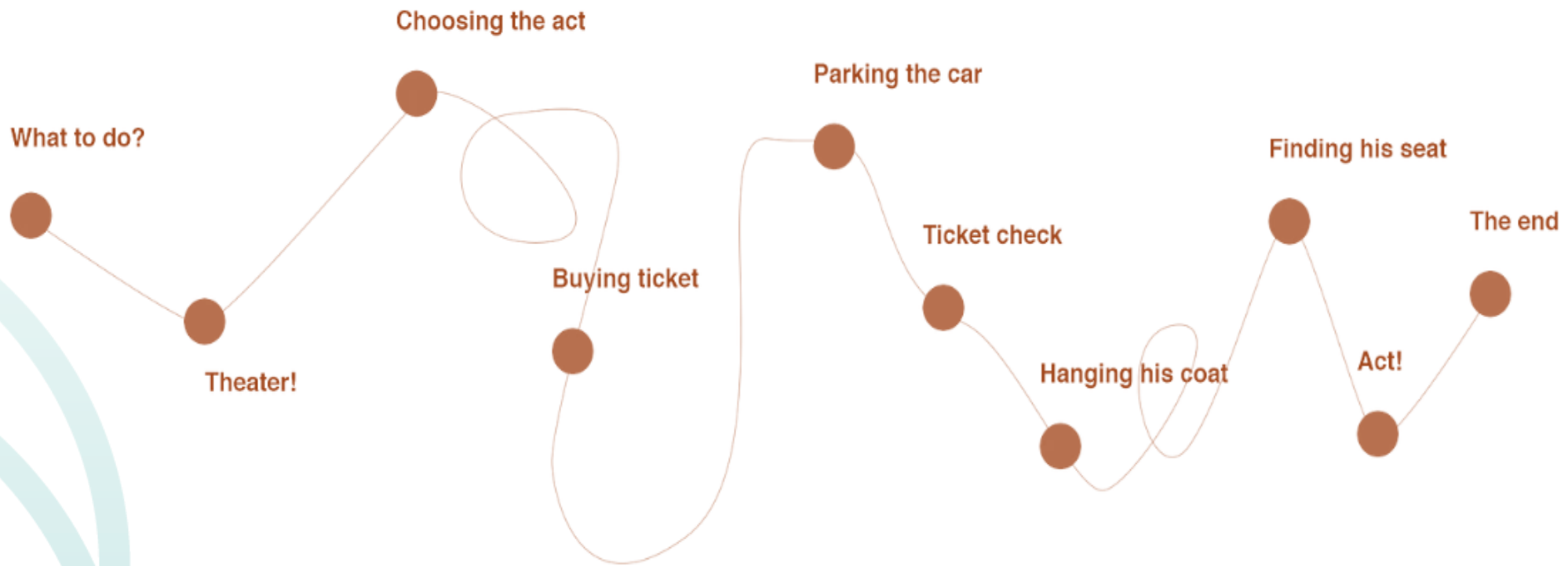


EXPERIENCE

Write down the entire client journey from introduction all the way to the next gen handoff. Create an entire client lifecycle and you'll serve your clients better.

CX EXAMPLE

A NIGHT AT THE THEATER



1 Romantic date in the theater

2



Jack

Scenario:

Jack plans his romantic date in the theater. He was looking for a sexy and sophisticated night out, to dress his best suit, to be the best version of himself. He's looking for performance that would satisfy his idea of fun and romantic evening. The theater location should be near some great restaurant, that serves great wine and food, and would work after the performance ends.

Goals:

- Sophisticated environment
- Performance should supplement "fun & romantic" evening
- Great bar/restaurant should work after the performance ends

3

STEPS

RESEARCH

PURCHASE

ARRIVE

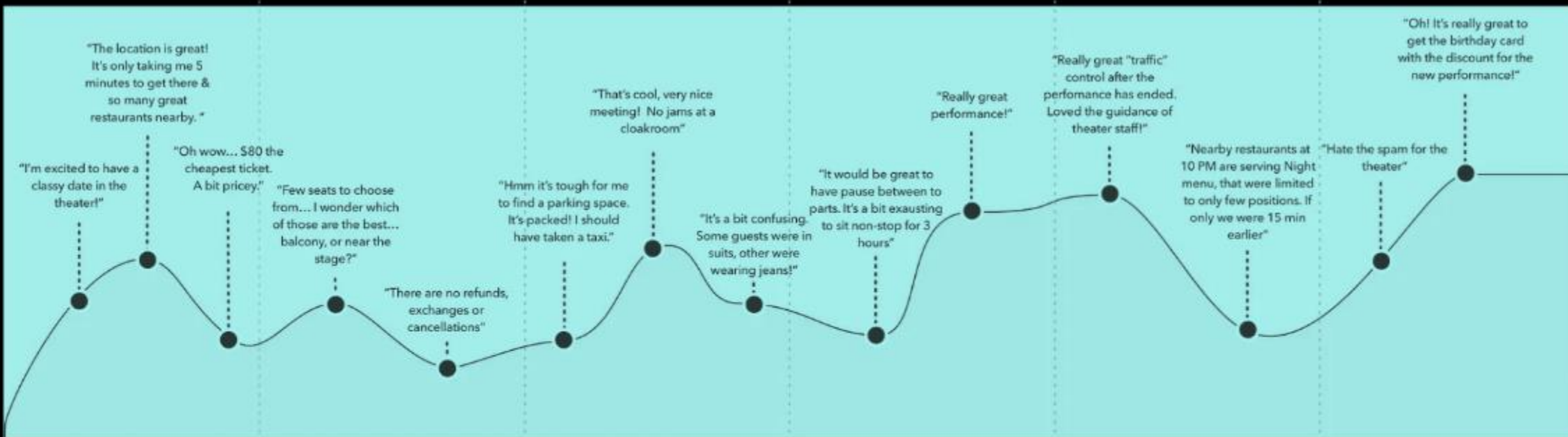
SHOWTIME

EXIT

EXTEND

4

EMOTIONS & THOUGHTS



INS

- Search for NY theaters repertoire for specific day
- Read play reviews
- Choose the play

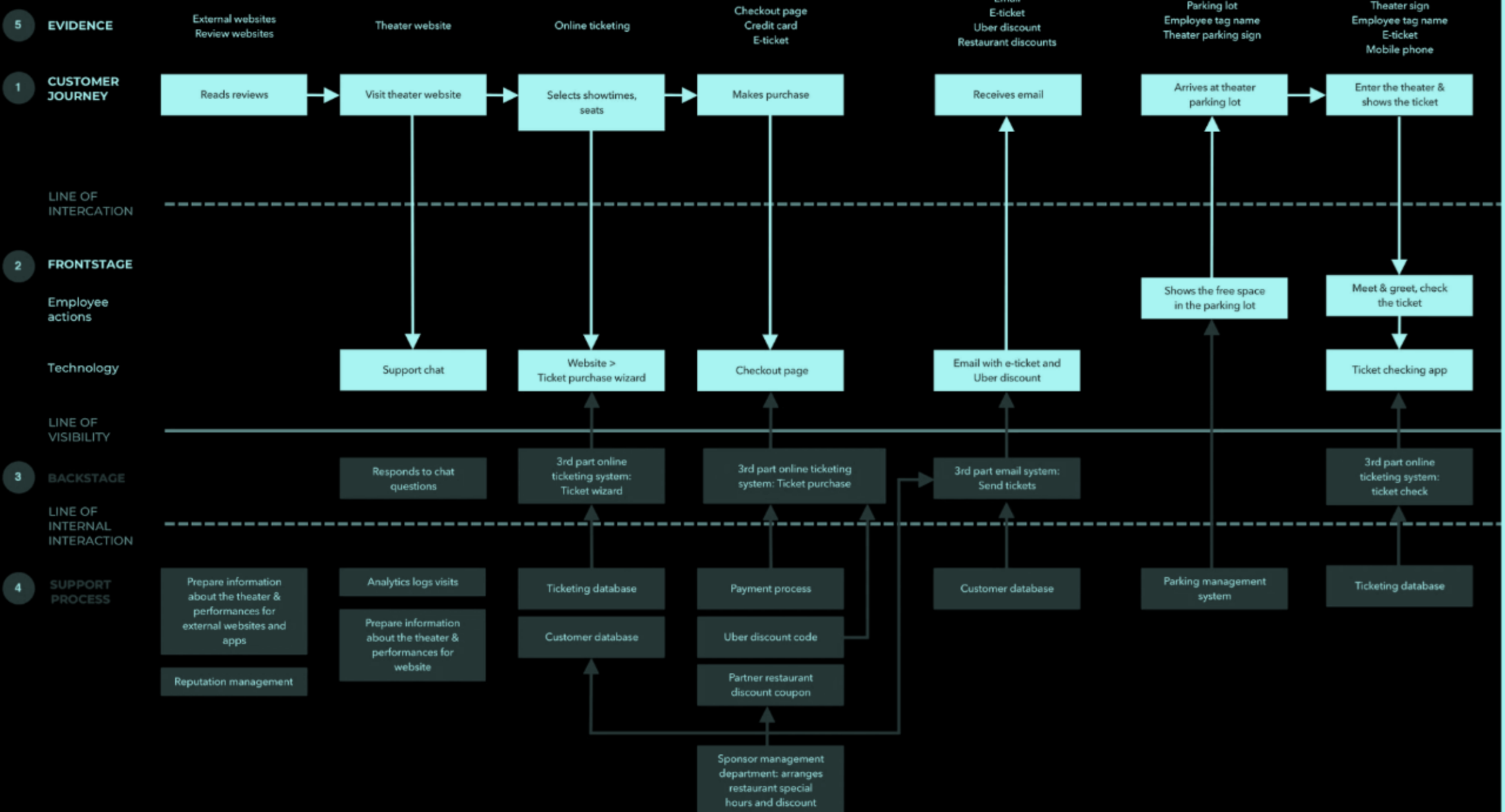
- Choose the play, time and seats.
- Research which seats are good...

- Park the car
- Enter the theater
- Show the tickets to concierge

- Watch performance
- Went to bathroom
- Finding your seat in the dark

- Exit theater hall
- Take your coat from cloakroom
- Go to restaurant

- Receive newsletter with repertoire
- Receive a gift card with discount



ENGAGEMENT AUDIT CHECKLIST

FROM OUR FRIENDS AT ABSOLUTE ENGAGEMENT
SEE 2021 LESSON BY JULIE LITTLECHILD FOR MORE

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ABSOLUTE ENGAGEMENT

The Evolution of Your Client Experience: The Checklist

The future of the client experience will be co-created with your clients to ensure that you are providing the most meaningful support. As you think about the evolution of that client experience, consider how you will:

- 1. Change the client conversation.** The immediate needs, concerns and emotions of your clients are that are have been impacted by the last year. How can we step into what they need, right now, to ensure that your reviews reflect what is most important (even if your client isn't sure what that is)?
- 2. Enhance your client communications.** The challenges and priorities of your client may be shifting and that should influence the communication you share. How can you personalize your communication to clients to ensure that you are providing the support they need and want?
- 3. Evaluate the client experience.** The preferences and expectations of your clients may be changing. Their concerns will impact how often you meet, how you meet (e.g., zoom), how you connect (e.g., social media) or the tools that you provide to clients.

We know that making the client experience starts with a clear understanding of what your clients are feeling, what they need and what they expect. Below is a checklist to help you identify any potential gaps for you and your team.

Do You Know?	Do You Need to Take Action?
1. Change the Conversation	
What are the biggest challenges our clients are facing right now?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients. <input type="radio"/> This isn't important to us.
Do our clients, who are couples, share the same challenges?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients. <input type="radio"/> This isn't important to us.
What level of self-confidence are our clients feeling (sense of security, control, confidence and clarity)?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients. <input type="radio"/> This isn't important to us.
How has the pandemic impacted how our clients think about their financial futures?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients. <input type="radio"/> This isn't important to us.
How has the pandemic changed our clients' priorities?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients. <input type="radio"/> This isn't important to us.

ABSOLUTE ENGAGEMENT

Do You Know?	Do You Need to Take Action?
2. Enhance Your Client Communications	
What topics are our clients interested in learning about?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients. <input type="radio"/> This isn't important to us.
What topics are the children of our clients interested in learning about?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients. <input type="radio"/> This isn't important to us.
How do our clients want to consume content (e.g., webinar, video)?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients. <input type="radio"/> This isn't important to us.
3. Evolve Your Client Experience	
How often do clients want to meet in the next 12 months?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients. <input type="radio"/> This isn't important to us.
Do clients want to get back to in-person meetings or do they prefer online reviews?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients. <input type="radio"/> This isn't important to us.
What is working (and what is not) when it comes to our virtual reviews?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients. <input type="radio"/> This isn't important to us.
Do our clients want to involve others in their reviews (e.g., family, executor)?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients. <input type="radio"/> This isn't important to us.
If you've identified areas where you need input from clients, what are your next steps?	
How Can We Help?	



CLARIFYING YOUR
IDEAL CLIENT BASE



CLEARLY DEFINING &
DELIVERING DEEPER
VALUE



BUILDING A HYPER-
EFFICIENT DELIVER
SYSTEM

OUR FOCUS
THIS QUARTER