

UPCOMING EVENTS



06.03 PRODUCTIVITY VIRTUAL SUMMIT

UPCOMING COACHING CALLS



05.13 OFFICE HOURS
with Coach Stephanie & Coach Adam

05.20 PERSONAL PEAK COACHING CALL
with Coach Liz



USE ZOOM Q&A FOR TODAY'S QUESTIONS



LIFESTYLE

PEAK PRACTICE

COACHING CALL



MARCH 2024



CLARIFYING YOUR
IDEAL CLIENT BASE



CLEARLY DEFINING &
DELIVERING DEEPER
VALUE



BUILDING A HYPER-
EFFICIENT DELIVERY
SYSTEM

OUR FOCUS
THIS QUARTER

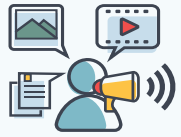
This Month's Topic

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



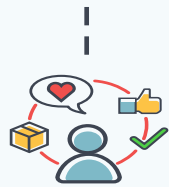
Awareness



Interest



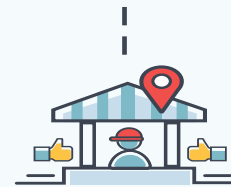
Consideration



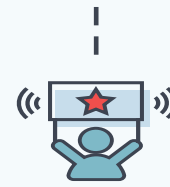
Evaluation



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.

6 Align your culture

The sixth step to delivering a great CX is to align your culture and vision with your CX goals and values. You can use various tools and techniques to define and communicate your CX vision, mission, and values, such as vision statements, value propositions, customer personas, customer journey maps, and brand guidelines. You can also use various methods and practices to foster and sustain a customer-centric culture, such as leadership, teamwork, recognition, feedback, and learning. The objective is to create a shared understanding and commitment to CX excellence among all your stakeholders.



CLARIFYING YOUR IDEAL CLIENT BASE



CLEARLY DEFINING & DELIVERING DEEPER VALUE



BUILDING A HYPER-EFFICIENT DELIVERY SYSTEM

Limitless Advisor SUMMIT ACTION PLAN

NAME: Milton Aire
YEAR: 2024
QUARTER: Q2 / Delivering Value

This Quarter's Priorities

Big Why & Desired Outcomes

Clarify the outcome you want to create, the benefits of achieving it and why it's important to you.

Big Priority: Identify a niche focus

Drive faster, more focused growth

ACTION	DUE DATE	OWNER	NOTES
ACTION 1: Complete Client Niche Inventory			Assess profitability & capacity
ACTION 2: Conduct COI and Client interviews			See Fee Transitions Guidebook
ACTION 3: Define your niche client			See Service Model Transitions Gui
ACTION 4: Draft your Ideal Client Profile			See Client Transitions Guidebook
ACTION 5: Launch your new niche in marketing			Take 7s to Tribe & Coaching Calls

Progress Priority: Right-Size my client base

Ensure balance between revenue, capacity and profitability

ACTION	DUE DATE	OWNER	NOTES
ACTION 1: Evaluate your Client Time Model			See Client Time Model worksheet
ACTION 2: Define new services by segment			See Client Service Model worksheet
ACTION 3: Do Client Profitability Analysis on new model			Ensure capacity, profitability align
ACTION 4: Prepare plan and materials for client launch			See Service Model Transitions Gui
ACTION 5: Systematize & automate services work flows			Use specialized tiers when ready

Progress Priority: Client Service Model

Re-define services to ensure deep value to client and firm

ACTION	DUE DATE	OWNER	NOTES
ACTION 1: Do Client Segmentation & Fee Analysis model			Assess impact of potential change
ACTION 2: Set new fees & minimums in line with goals			See Setting Fees worksheet
ACTION 3: Draft Client Communication plan & materials			See Fee lesson resources
ACTION 4: Implement fee raise with first batch of clients			Start with smallest, least impactful
ACTION 5: Implement fee raise with remaining batches			Take 7s to Tribe & Coaching Calls

Progress Priority: Fee Raise

Ensure client fees align with value delivered and profitability goals

Reference and use the On-Purpose Project Planner to help you effectively scope, implement and manage each priority for optimal results.

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LIMITLESS Q&A