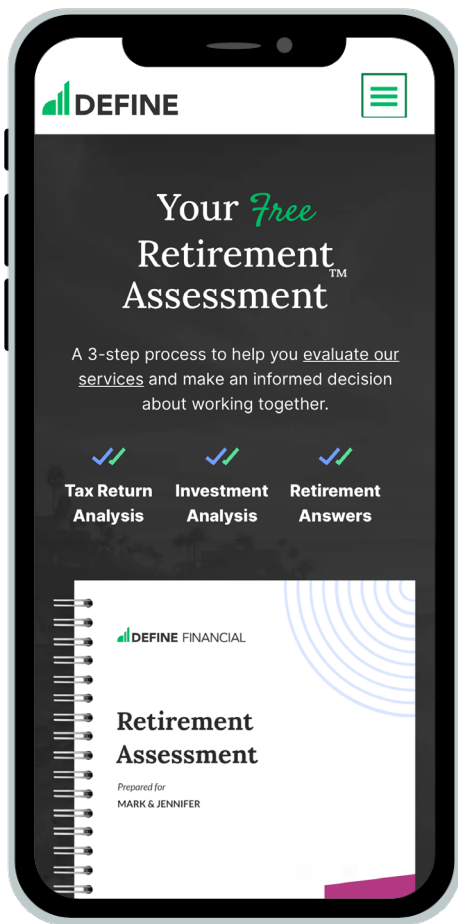


YOUR CX PROCESS

Let's look at a model Client Experience Process from Define Financial so you can craft your own. Here's a overview of what you'll write:

- Title
- Promise (what they will get)
- Ideal Client Profile (3 characteristics)
- 3-Step Process Header
 - Step 1 (with CTA/download)
 - Step 2
 - Step 3
- Closing Copy
- CTA/Next Step

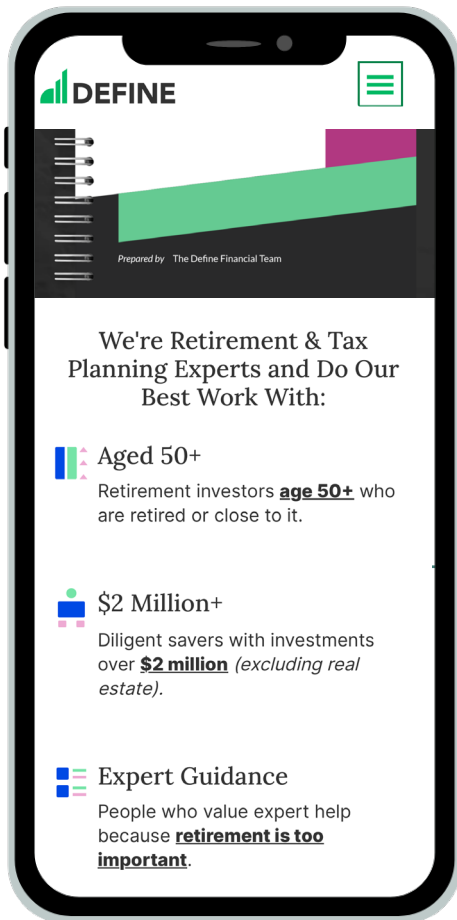


• Title

[Empty dotted box for writing the Title]

• Promise (what they will get)

[Empty dotted box for writing the Promise]

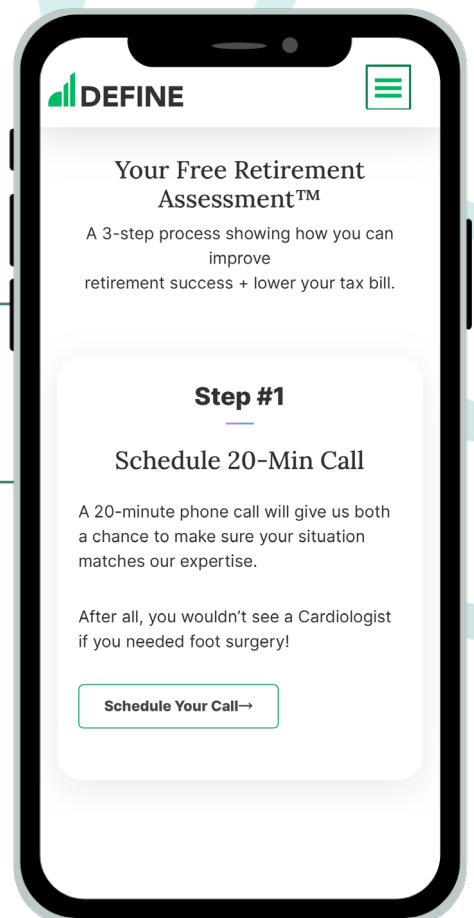


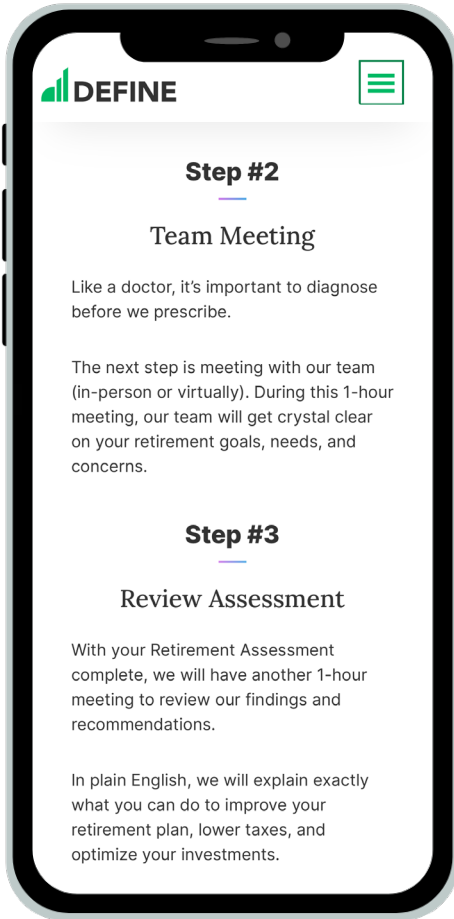
● **Ideal Client Profile (3 characteristics)**



● **3-Step Process Header**

● **Step 1 (with CTA/download)**

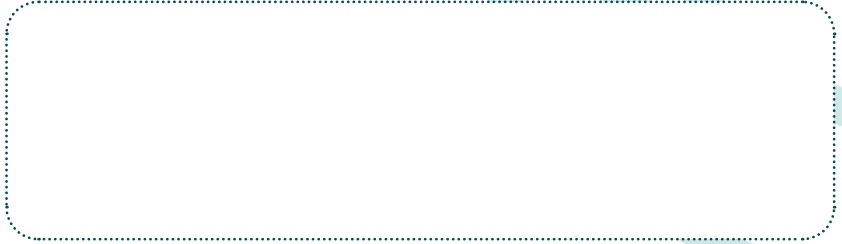




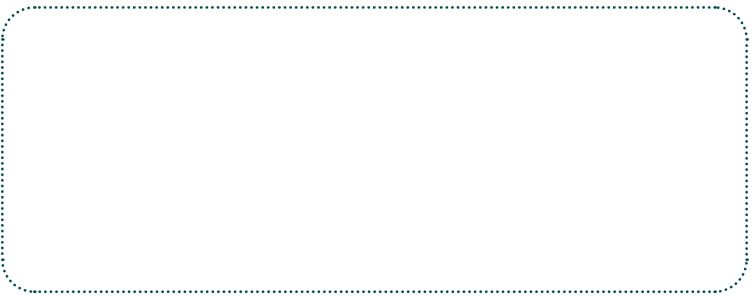
Step 2



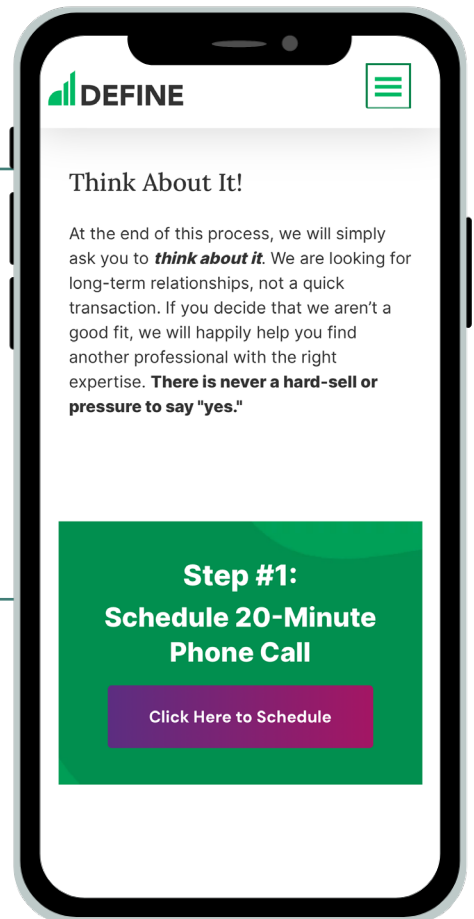
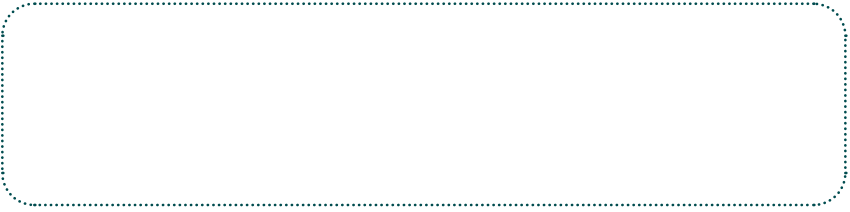
Step 3



Closing Copy



CTA/Next Step



Think About It!

At the end of this process, we will simply ask you to **think about it**. We are looking for long-term relationships, not a quick transaction. If you decide that we aren't a good fit, we will happily help you find another professional with the right expertise. **There is never a hard-sell or pressure to say "yes."**

**Step #1:
Schedule 20-Minute
Phone Call**

[Click Here to Schedule](#)