

Client Journey Map.

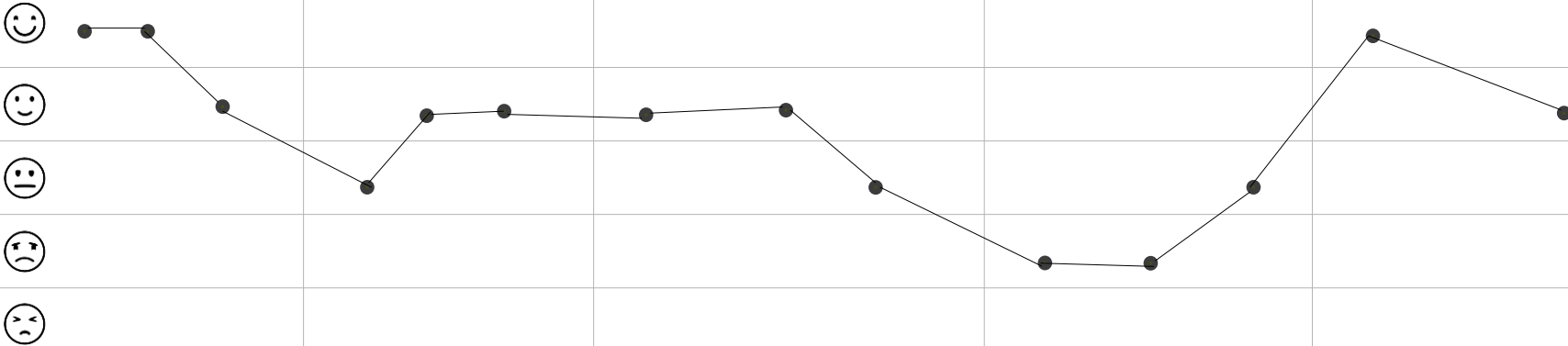
Use this template to visualize your client journey from their perspective. Each touchpoint/Interaction could include a meeting, event, email, or any other client communication. Use this page for each of your client segments or “tiers”.

	AQUISITION		SERVICES		LOYALTY
	Discovery/Proposal	Onboarding	Planning	Investment management	Ongoing
TOUCHPOINTS					
EXPERIENCE	😊				
	😊				
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	😞				
	😡				
OPPORTUNITIES					
NOTES					

Client Journey Map.

Here's an example.

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	AQISITION		SERVICES		LOYALTY
	Discovery/Proposal	Onboarding	Planning	Investment management	Ongoing
TOUCHPOINTS	15 minute intro call Get organized meeting Proposal meeting	Signing ceremony meeting New client letter Welcome phone call	2 client review meetings End of year tax planning meeting Annual recommendations with tax preparer	Tax transition analysis letter Capital gains distribution meeting RMD mailing	Annual Christmas wrapping event Birthday card
	Total: 3	Total:3	Total:3	Total:3	Total:2
EXPERIENCE					
	SWITCH ESIGNATURE PROVIDERS? PROVIDE ESIGNATURE TRAINING GUIDE?		PREPARE CLIENT AHEAD OF TIME FOR TAX PREP CONVERSATION? DISCUSS EARLIER IN THE YEAR?	SEEK BETTER VISUAL OF TRANSITION ANALYSIS “WIIFM” ENGAGE SEI TAX TEAM.	STOP SENDING BIRTHDAY CARD?
	NEED TO IMPROVE ONBOARDING EXPERIENCE. FEEDBACK HAS BEEN THAT IT TOOK TOO LONG AND WAS TOO COMPLICATED TO UNDERSTAND.		NEGATIVE FEEDBACK ON TAX PREPARER, RELATED TO DELIVERABLE.	POTENTIALLY AN ISSUE WITH CSA. WE MAY NEED TO PROVIDE MORE TRAINING.	WHAT WOULD CLIENTS VALUE MORE THAN A BIRTHDAY CARD?