

Service Model Scorecard.

An effective service model can be a driver for growth and scale. Complete the scorecard to understand if you have what you need to succeed. Any question that is not a confident “Yes” is an opportunity to develop your approach.

		YES	NO	IF “NO”...
BUILD IT	Do you have defined client segments to inform the services and experience you offer?			Segmentation accelerator
	 Once complete, did client segmentation help uncover commonalities or patterns that provide clarity on who you serve and what you do for them?			Start with ‘who’ is ideal or back into the ‘who’ by identifying the ‘what you do’ and who can benefit from it
	Do you use visuals to explain your services, service model and/or client experience?			Client Visual Templates
	Are services and client experience build around what matters most to your clients?			Service Model Builder Check out our Things to Consider
	Do you provide evidence on the value you deliver?			Check out SEI’s Taxes Saved Report
EXECUTE IT	Are you charging appropriately for the services you provide?			Pricing Guide
	Are your services and fees listed clearly on your website?			Website sample 1 and sample 2
	Do you communicate with clients based on their preferred method and frequency?			Client Communications in Volatile Times
	Perceived value = services received - less the cost. Do the clients you wish to retain perceive maximum value for your services?			Find out using an Absolute Engagement client survey
	Do you consistently deliver services as promised?			10 tips to implement workflows Map out your Client Journey
	Are you getting (at least) 10 new client referrals for every 100 current clients?			Referral toolkit
	Are you adequately staffed to deliver on your service model?			Refine your talent strategy