

Elevating The Client Experience

Delivering Value, Building Relationships,
& Winning Long-Term Business



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**"Customer experience
is the new marketing."**

-Steve Cannon

Redefining Client Experience

Emphasize the shift from transactional to transformational interactions.

- Shifting Focus from Service to Outcomes
- Building Relationships vs. Revenue
- Client-Centric vs. Company-Centric
- Proactive vs. Reactive Approach



An Intentional Client Experience Process Leads to...

- Client Loyalty/Longevity
- Differentiation
- Higher Revenues
- Increased Profitability
- Positive Brand Awareness



What Not To Do Re: Client Experience...

- Over-Promising & Under-Delivering
- Lack of Personalization
- Inconsistent Communication
- Neglecting Ongoing Support
- Ignoring Feedback
- Inadequate Service Recovery



Elements of Exceptional Client Experience

- New Client Onboarding
- Exceeding Client Expectations
- Service Delivery Process/Promise Fulfillment
- Ongoing Client Support/Retention
- Bringing Additional Value
- Service Recovery

New Client Onboarding

Exceeding Client Expectations

Service Delivery Process / Promise Fulfillment

Ongoing Client Support / Retention

Bringing Additional Value

Service Recover

Starting Strong The Art of Client Onboarding

Client onboarding is the process of introducing new clients to your services and ensuring a “good start.”

Sets the tone for the client relationship and reduces churn.

Tips & Tools: Welcome Packet, Kickoff Meeting, Training and Resources, Follow-up



Exceeding Client Expectations

Manage expectations then delivering outcomes that exceed client expectations.

Tangible Value & Intangible Value. Create quantitative AND qualitative experiences.

This is THE place where you can maximize the Lifetime Value of a Client (CLV).

CLV =

Client Value

X

Average Client Lifespan

Deliver on Promises Service Excellence

Consistently providing your promised services to clients.

Reliability, Proactivity, Listening

Strategies: Clear Communication, Quality Assurance, Performance Metrics.



Staying Engaged Create Long-Term Client Success

Continuously offering and bringing new value to your clients.

Your clients are your best prospects...
and advocates.

Techniques: Regular Check-ins, Personalized Support, Feedback Loops.



Going Above and Beyond Adding Extra Value

Offering unexpected value beyond your core services to enhance the client relationship.

Instantly creates differentiation and fosters deeper client loyalty.

Examples: Proactive Advice, Exclusive Resources, Partnership Opportunities.



Turning Mistakes into Opportunities **Service Recovery**

Addressing service failures and restoring
client satisfaction

Retains clients, Demonstrates commitment,
Leads to client advocacy

Approaches: Acknowledgment, Empathy, Apology,
Quick Resolution, Compensation, Follow-Up




Takeaways for Client Experience Excellence

Shift from a Transactional approach to one focused on Transformation.

All desired business results can be helped by being intentional with your client experience.

Great client experience begins with empathy.





"Customer experience is the next competitive battleground. It's where business is going to be won or lost."

-Jerry Gregoire