

DELIVER WORLD-CLASS SERVICE

Client Experience Timeline

ABOVE THE LINE

Above the *Client Experience Timeline*, focus on where the client is in the process.

STAGE 1

After choosing you, clients are often in the “honeymoon” stage of the experience, feeling uncertain, yet optimistic. They are wondering if they made the right choice.

STAGE 2

Begins after the “honeymoon” is over and lasts until a product is identified. While “searching,” clients experience many ups and downs, and may lose sight of their original goals.

STAGE 3

Begins when the search has ended and lasts until the final decision is made. Clients are in a “deciding” mode as they weigh their final options carefully. They are making a big commitment and need reassurance and guidance.

STAGE 4

Begins after the decision has been made and lasts until transaction details are concluded. Clients need support and expert assistance.

STAGE 5

Begins when details are final and lasts through the close of the transaction. Clients are moving forward with their plans and hoping for a smooth transition.

Initial Consultation

Honeymoon Stage

Searching Stage

Deciding Stage

Details Stage

Finalizing Stage

Celebration

BELOW THE LINE

Below the *Client Experience Timeline*, focus on using touchpoint systems to exceed client expectations.

Touchpoint 1

Touchpoint 2

Touchpoint 3

Touchpoint 4

Touchpoint 5

Go Green!