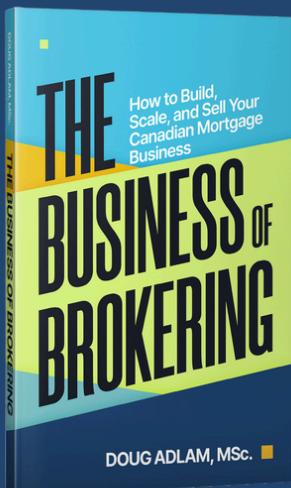


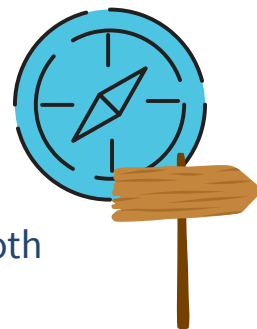
## Chapter 10 – Worksheet

# Client Experience is a Business

A S S E T

*Purpose: Map, refine, and systematize your client experience so it becomes a defensible business asset.*





# 1) Map the Client Journey

List all touchpoints from first contact → funding → follow-up. Capture both functional + emotional aspects.

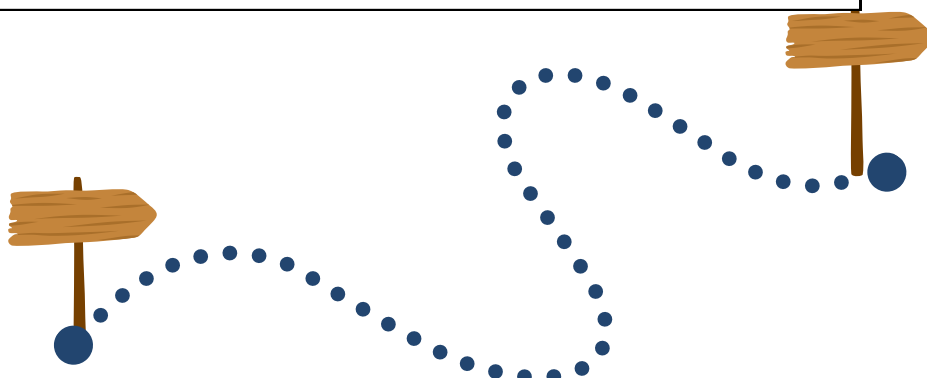
Stage	Touchpoint	Client Emotion	Friction / Confusion?	Improvement Idea
Discovery / First Contact				
Application & Docs				
Approval & Conditions				
Closing / Funding				
Post-Close / Follow-up				

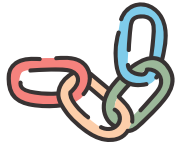
# 2) Consistency Check

Where do we make exceptions that risk breaking our process?

# 3) Client Feedback Loop

How do we collect, review, and act on client feedback consistently?





## 4) Link to Brand Promise

Write 2–3 sentences that connect our client experience to our brand identity.

***Prompt: How do we want clients to FEEL at each stage, and how does that reflect who we are as a brand?***

