

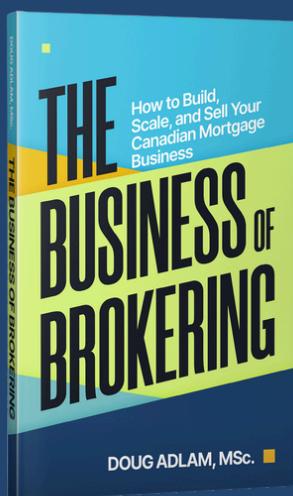
Chapter 10 – Worksheet



Client Experience is a Business

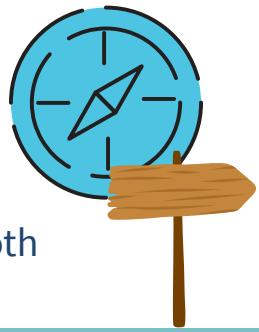
A S S E T

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.



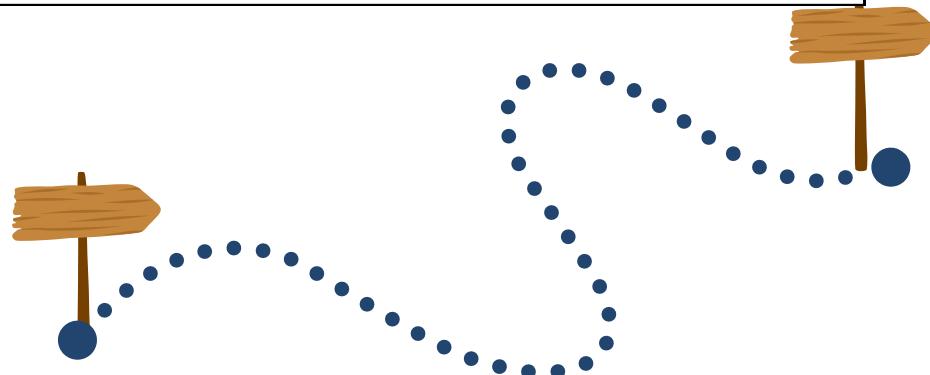
Stage	Touchpoint	Client Emotion	Friction / Confusion?	Improvement Idea
Discovery / First Contact				
Application & Docs				
Approval & Conditions				
Closing / Funding				
Post-Close / Follow-up				

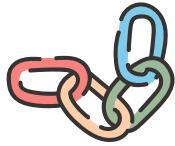
2) Consistency Check

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?

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