



## Client Journey Map

|  | Awareness | Consideration | Decision | Delivery | Growth |
|--|-----------|---------------|----------|----------|--------|
| Action of client?  |           |               |          |          |        |
| Who is involved?   |           |               |          |          |        |
| What technologies are being used?                                  |           |               |          |          |        |
| Mindset of client?   |           |               |          |          |        |
| What are the client pain points?                                   |           |               |          |          |        |
| What value is currently being provided?                            |           |               |          |          |        |
| How do we currently know they are ready to move to the next phase? |           |               |          |          |        |



# Target Client Worksheet

## Part 1: Who Are the Types of Clients You Want More of?

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|--|
|  |
|  |
|  |

## Part 2: How Would You Describe Them?

| <u>BEST CHARACTERISTICS</u> | <u>CHALLENGING CHARACTERISTICS</u> |
|-----------------------------|------------------------------------|
|                             |                                    |
|                             |                                    |
|                             |                                    |
|                             |                                    |
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|                             |                                    |
|                             |                                    |

## Part 3: What Do They Value?

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|  |



# Target Client Worksheet

## Part 4: How Much Revenue Do They Generate For the Firm?

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|  |
|  |

## Part 5: What Are Three Common Services This Client Would Have?

|    |
|----|
| 1. |
| 2. |
| 3. |

## Part 6: What Are Three Additional Services This Client Could Grow Into?

|    |
|----|
| 1. |
| 2. |
| 3. |



## Employee Experience Journey Map

|                         | Attract | Recruit | Onboard | Develop | Retain | Transition |
|-------------------------|---------|---------|---------|---------|--------|------------|
| Key Activities          |         |         |         |         |        |            |
| Trigger for Next Phase? |         |         |         |         |        |            |



## Employee Persona by Role

|            | <b>Who are they?</b>                                      | <b>Goals and Motivation</b>                              | <b>Frustrations</b>   | <b>Interactions</b>                             | <b>Success Path</b>  |
|------------|---|--|---|---|--|
|            | Demographics, Education, Time at the firm, Location, etc? | What do they want to accomplish?<br>What motivates them? | What obstacles are they facing? What problems are they trying to solve? | Who do they interact with? Who influences them? | How do they perform at their best and highest level? How do they find success in the firm? |
| Staff      |   |  |   |   |  |
| Senior     |   |  |   |   |  |
| Manager    |   |  |   |   |  |
| Partner    |   |  |   |   |  |
| Operations |   |  |   |   |  |
| IT         |   |  |   |   |  |



# Take It Back Tool

Name: \_\_\_\_\_ Date: \_\_\_\_\_

|    | <b>WHAT</b><br>Key Point to share in your firm. | <b>WHO</b><br>Who will your share with? | <b>WHY</b><br>Why do they need to know? | <b>WHEN</b><br>Date |
|----|---|---|---|---------------------|
| 1) |   |   |   |                     |
| 2) |   |   |   |                     |
| 3) |   |   |   |                     |

