

The Evolution of Your Client Experience: The Checklist

The future of the client experience will be co-created with your clients to ensure that you are providing the most meaningful support. As you think about the evolution of that client experience, consider how you will:

- 1. Change the client conversation.** The immediate needs, concerns and emotions of your clients are fluid and have been impacted by the last year. How can you tap into what they need, right now, to ensure that your reviews reflect what is most important (even if your client isn't sure what that is)?
- 2. Enhance your client communications.** The challenges and priorities of your clients may be shifting and that should influence the communications you share. How can you personalize your communications plan to ensure that you are providing the support they need and want?
- 3. Evolve the client experience.** The preferences and expectations of your clients may be changing. Those changes will impact how often you meet, how you meet (e.g., zoom), how you connect (e.g., social media) or the tools that you provide to clients.

We know that evolving the client experience starts with a clear understanding of what your clients are feeling, what they need and what they expect. Below is a checklist to help you identify any potential gaps for you and your team.

Do You Know?	Do You Need to Take Action?
1. Change the Conversation	
What are the biggest challenges our clients are facing right now?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients <input type="radio"/> This isn't important to us.
Do our clients, who are couples, share the same challenges?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients <input type="radio"/> This isn't important to us.
What level of self-confidence are our clients feeling (sense of security, control, confidence and clarity)?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients <input type="radio"/> This isn't important to us.
How has the pandemic impacted how our clients think about their financial futures?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients <input type="radio"/> This isn't important to us.
How has the pandemic changed our clients' priorities?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients <input type="radio"/> This isn't important to us.



Do You Know?	Do You Need to Take Action?
2. Enhance Your Client Communications	
What topics are our clients interested in learning about?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients <input type="radio"/> This isn't important to us.
What topics are the children of our clients interested in learning about?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients <input type="radio"/> This isn't important to us.
How do our clients want to consume content (e.g., webinar, video)?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients <input type="radio"/> This isn't important to us.
3. Evolve Your Client Experience	
How often do clients want to meet in the next 12 months?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients <input type="radio"/> This isn't important to us.
Do clients want to get back to in-person meetings or do they prefer online reviews?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients <input type="radio"/> This isn't important to us.
What is working (and what is not) when it comes to our virtual reviews?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients <input type="radio"/> This isn't important to us.
Do our clients want to involve others in their reviews (e.g., family, executor)?	<input type="radio"/> This is important but we've got it covered. <input type="radio"/> This is important and we need more input from clients <input type="radio"/> This isn't important to us.

If you've identified areas where you need input from clients, what are your next steps?

How Can We Help?

[LEARN MORE](#)

If you're interested in finding out we can help you gather direct input to evolve your client experience (and grow your business), you can **learn more here.**

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If you'd like to set a time to meet, please **click here** to find a time that works for you.

