ATLAS PARK
CONSULTING & FINANCE

Client Success Plan VIP Audit!

What Is It?

The **Client Success Plan VIP Audit** is an examination of your client experience and performance. Our program provides insights and strategies on how to enhance client engagement and satisfaction throughout the client journey. Benefits and emphasis on how to maintain client relationships and enhance service delivery during the first 12 months in operation. Teams will get clarity on how to design smooth onboarding programs, managing clients expectations and increasing revenue and referrals, leading to higher client satisfaction and client retention.

What You Need To Know

USP: Statistics show, it takes more money to find a new client, than to simply keep an existing client happy with quality service. How to onboard and retain clients is a direct reflection of your ability to keep cash flow “flowing” and referrals high. Our program will help you be equipped to prevent revenue interruptions, retain existing clients, and attract new ones, driving sustainable growth for your business.

What’s Covered In Our Client Success Plan VIP Audit?

Smooth Onboarding Strategies
- Clear steps to start working with clients and improve your client onboarding
- Tips to maximize the efficiency of your tech tools
- How to keep your onboarding systems running smoothly

Client Communication Mastery
- Setting up your service plans tailored to each client
- How to manage client expectations and set the stage
- Maintaining regular and meaningful communication with clients

Client Retention Excellence
- How to review and enhance your service offerings
- Strategies for continuous and open communication with clients
- Case studies and strategies to consistently deliver exceptional service to impress and retain clients

What Will I Receive?

Kick Off Call
We will set the stage with you and your team about what you can expect from us. We will ask for your transparency about where you're at and what frustrates you. We will lay out the following weeks of activities and priorities so you have full visibility of what's next.

1:1 Leadership Interviews
We will schedule and conduct a thorough interview with leadership to discuss sensitive matters and service metrics.

Documentation Requests and Review
Depending on your 1:1 interviews, there may be requests for documentation such as existing Standard Operating Procedures (SOPs) or other materials that will aid in the evaluation of your client service plan.

Present and Discuss Assessment Report
After you've reviewed the report, we will schedule a team meeting to review the findings, answer any questions and establish what the implementation steps could look like.

Implementation Review Call
After you've reviewed the report, we will schedule an implementation review call when you can screen share your CRM and we can discuss how you can implement the new processes into your system. Your VA or Assistant is welcome to attend the session.

Total Retail Bonus Value $1850

Technology Stack Map Analysis: We'll take a look at your tech stack, across your client onboarding and help you identify how to improve leverage of your software in relation to your Client Success Plan processes.
Value $1050

Structured SOPs Template: An inventory checklist of Standard Operating Procedures (SOPs) to amplify execution of your Client Service Success Plan.
Value $800

Satisfaction Guarantee

If you're not satisfied with the progress we've made in your Client Success Plan objectives after the first 30 days, We'll offer a full refund for that period.