Training Document for Effective Client Management

Three Key Strategies for Managing High-Ticket Clients

1. The One-Pager Document

- **Purpose**: Centralized reference document to align marketing, sales, and client success teams.
- **Components**:
    - **Who You Serve**: Clearly define your ideal client profiles (e.g., industry, revenue thresholds, demographics).
    - **What You Do**: A precise explanation of the services you provide and the expected outcomes.
    - **Understanding**: An agreement on expectations, processes, and potential challenges.
- **Benefits**:
    - Streamlines onboarding by setting clear expectations.
    - Filters out clients who may not align with the business model.
    - Ensures consistency across all client-facing teams.

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2. The Program Roadmap

- **Purpose**: Provides clients with a step-by-step guide to achieve their goals.
- **Structure**:
    - Define milestones (1 day, 7 days, 30 days, etc.).
    - Include action items for both the client and the service provider.
    - Use tools like Lucidchart for visual representation.

- **Best Practices**:
    - Include timelines and specific deliverables for both parties.
    - Use color coding to distinguish between client responsibilities and service deliverables.
    - Share the roadmap during sales and onboarding to set clear expectations.
- **Advantages**:
    - Accelerates the client's return on investment (ROI).
    - Reduces ambiguity and prevents delays.
    - Boosts client satisfaction, increasing testimonials, referrals, and potential upsells.

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3. The Hybrid Offer

- **Definition**: A blend of "Do-It-Yourself," "Done-With-You," and "Done-For-You" services.
- **Implementation**:
    - Identify common sticking points (e.g., technical setup or process bottlenecks).
    - Allocate tasks based on efficiency: what clients can handle versus what the service provider should manage.
    - Provide optional tools, contractors, or automation to bridge gaps.
- **Key Insights**:
    - Helps balance workload and scale operations effectively.
    - Improves client progress by addressing bottlenecks.
    - Allows for more flexible scaling by adjusting service levels dynamically.

Action Plan for Implementation

1. Create the One-Pager

- Define and document:
    - Ideal client profile (industry, revenue, location, etc.).
    - Core service offerings and expectations.
    - Non-negotiable client behaviors (e.g., communication standards).
- Share the one-pager across all teams.

2. Develop a Program Roadmap

- Build a detailed client journey map.
- Include timelines, milestones, and responsibilities.
- Train team members to refer to the roadmap during onboarding and service delivery.

3. Introduce a Hybrid Offer

- Review current bottlenecks in your process.
- Decide which tasks to automate, outsource, or handle in-house.
- Incorporate AI tools or vetted contractors to provide scalable solutions.

Expected Outcomes

- Increased efficiency in managing high-ticket clients.
- Enhanced clarity and reduced miscommunication between teams.
- Higher client satisfaction, leading to better retention and referrals.
- Scalable operations capable of handling more clients without quality compromise.

<mark>Actionable Checklist for Effective Client Management</mark>

Phase 1: Setup and Alignment

1. **Create a One-Pager Document**
   - Define the **ideal client profile** (industry, revenue, location, etc.).
   - Document your **core services** and expected outcomes.
   - Clearly outline **client expectations** and potential challenges.
   - Share the finalized one-pager with:
     - Marketing Team
     - Sales Team
     - Client Success Team
   - Integrate the one-pager into onboarding and sales scripts.

Phase 2: Onboarding New Clients

2. **Develop and Share a Program Roadmap**
   - Map out the client's journey with **key milestones**:
     - Day 1
     - Day 7
     - Day 30
     - Day 60
     - Day 90
   - Use visual tools (e.g., Lucidchart) to create a clear roadmap.
   - Assign **responsibilities**:
     - Client tasks
     - Service provider tasks

- ○ Incorporate color coding:
  - ■ Tasks handled by the client.
  - ■ Tasks handled by your team.
- ○ Provide a **welcome packet** with:
  - ■ Roadmap
  - ■ Login credentials and tools (if applicable).
  - ■ Contact details for team support.

Phase 3: Delivery and Scaling

3. **Implement a Hybrid Offer**
   - ○ Identify common **bottlenecks** in the service process.
   - ○ Create a "You Do, We Do" breakdown:
     - ■ Clearly assign tasks your team will handle (e.g., editing, technical setup).
     - ■ Assign tasks clients must handle (e.g., filming, initial data input).
   - ○ Provide additional resources, such as:
     - ■ Contractor recommendations.
     - ■ AI tools for automation.

Phase 4: Continuous Improvement

4. **Monitor and Refine Processes**
   - ○ Review client progress at set intervals:
     - ■ Day 7
     - ■ Day 30
     - ■ Day 60
   - ○ Collect and analyze feedback from:
     - ■ Clients
     - ■ Internal teams
   - ○ Update the one-pager and roadmap as necessary.
   - ○ Identify opportunities for upsells or backend offers.

Phase 5: Client Retention and Expansion

5. **Leverage Client Results**
   - ○ Gather testimonials and case studies:
     - ■ Highlight fast ROI success stories.
   - ○ Offer advanced or premium services to high-performing clients:
     - ■ Present additional services or products tailored to their needs.
   - ○ Foster referrals by:

- ■ Introducing referral incentives.
- ■ Engaging satisfied clients in promotional activities.

Daily Task Reminders for Team Members

- ● Review the one-pager before engaging with any client.
- ● Reference the program roadmap during client calls or check-ins.
- ● Ensure all client communications align with documented expectations.
- ● Promptly address client bottlenecks to avoid delays.