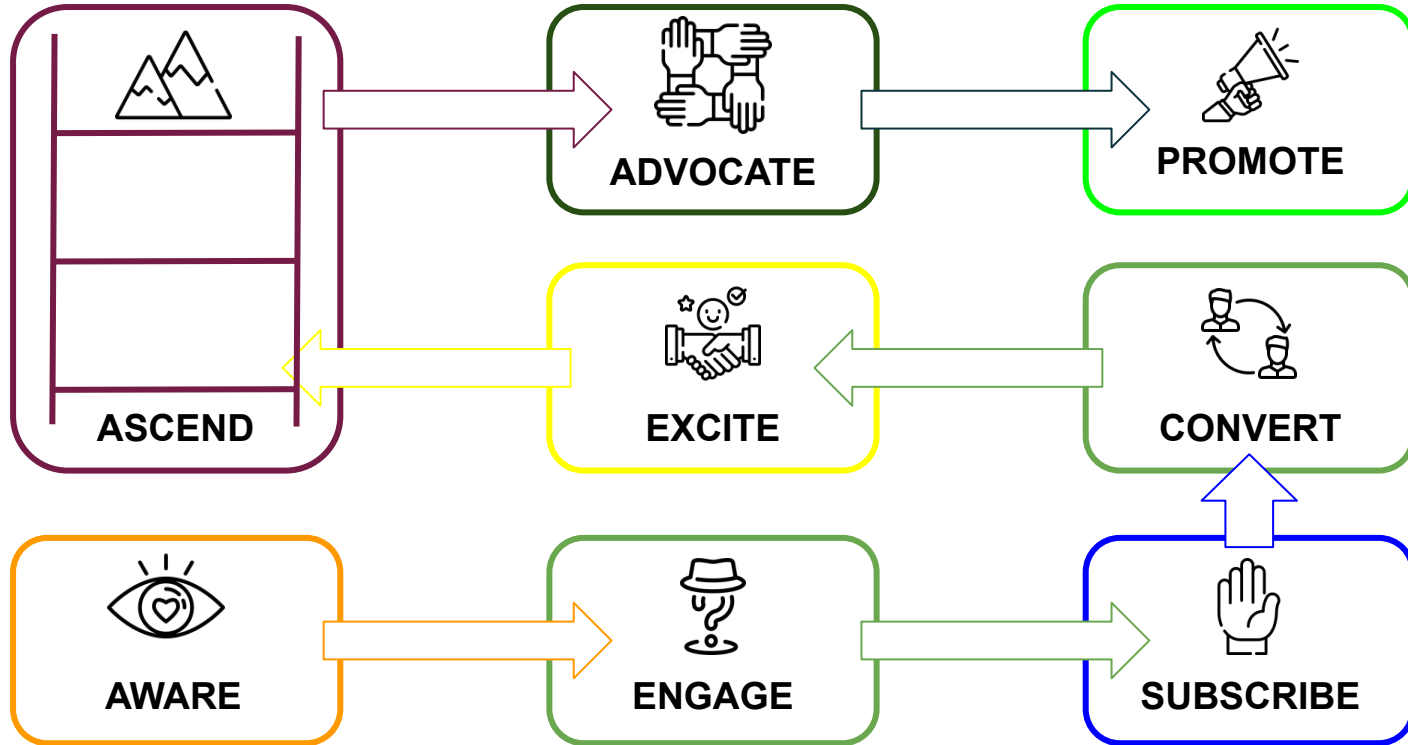


THE CLIENT JOURNEY

The process of turning strangers into raving fans



The Client Value Journey Definition

Businesses exist for one purpose only:

- To supply something of massive value to clients.

What is the only thing a business gets paid for?

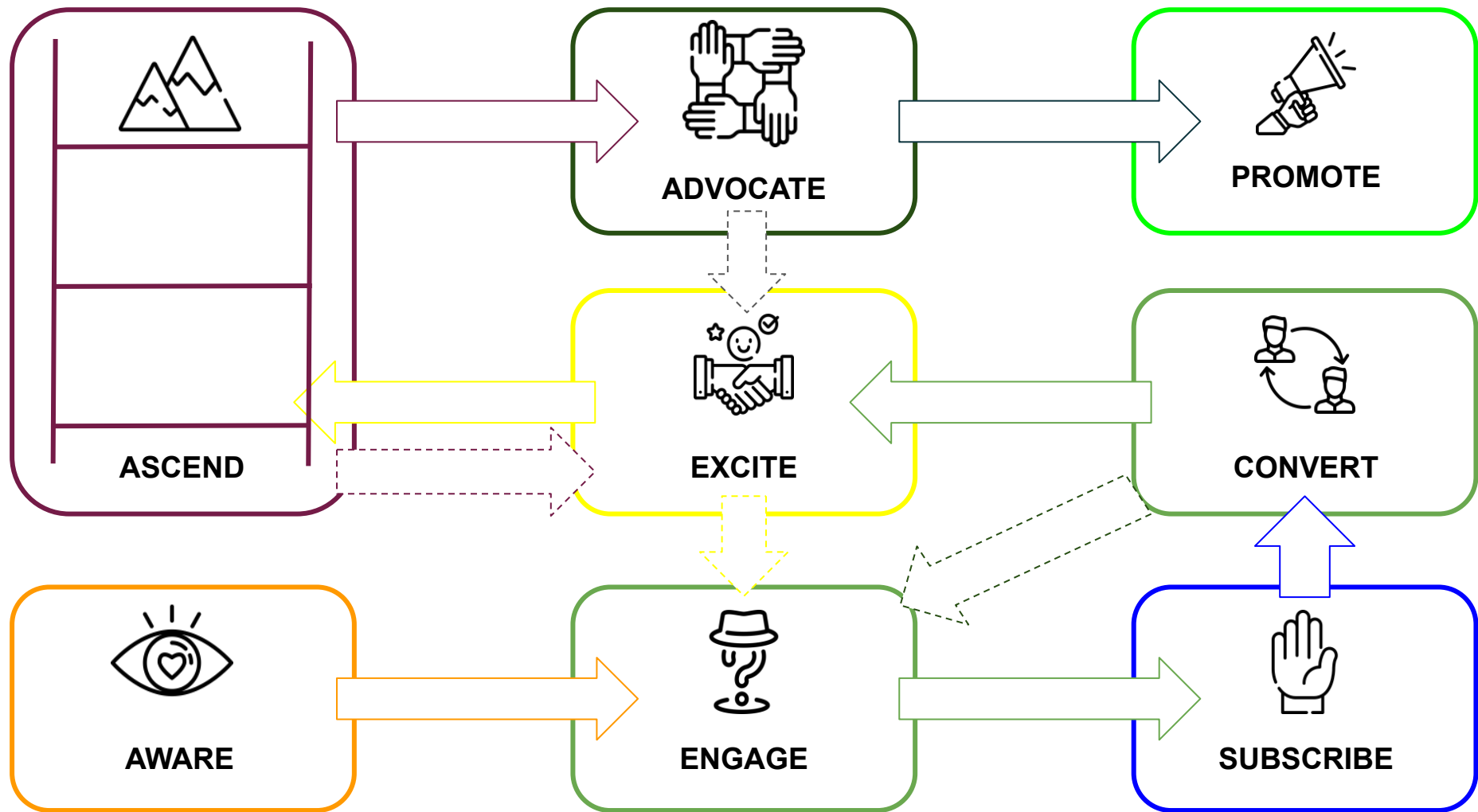
- Results
 - ◆ Results are the outcome of meeting a client's needs and desires.

What is a business?

- A System
 - ◆ A business is a system for consistently supplying significant value to clients.

What is the Client Value Journey?

- The Client Value Journey (CVJ) is a step-by-step process that describes how a Stranger becomes a Client for life.
- The CVJ is strategically organized into eight progressive stages. This stage-to-stage progression models the psychological process of how deep human relationships are formed, specifically, how people start out as strangers and eventually become partners for life.
- The CVJ describes a Prospect's progression through each of the eight stages with the end result being a raving fan Client for life.
- The journey begins with a stranger discovering the _____ brand. Then, the progressive establishment of trust, credibility, and expertise by learning from content and having meaningful conversations.
- The CVJ is strategically organized so prospective and current Clients don't get lost, confused, and distracted along the way.
- The CVJ is a closed-loop system and never ends - it becomes a path for current clients to experience even more value throughout their life.



Stage number: Stage Name

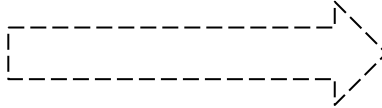
Ownership: Current Department

Stage Description: Describes the stage in simple terms.

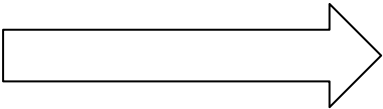
Step 1: In stage



Rescue/Attrition Strategy:



Step 2: Transition to next stage



Stage 1: Aware

Ownership: Marketing

Stage Description: The prospective Client (Prospect) becomes aware of _____.



[VALUE CHAIN](#)

Aware Steps

- 1)
- 2)
- 3)
- 4)
- 5)

Stage 2: Engage

Ownership: Marketing

Stage Description:

The **engaging** content is relevant to them and speaks to their needs and desires accurately and compellingly.

The Prospect begins trusting the brand as they absorb the content, and realizes that what they are learning will improve their financial life.

Prospective clients and current clients **engage** with content throughout the Value Journey.



Engage Steps

- 1)
- 2)
- 3)
- 4)
- 5)

Stage 3: Subscribe



Ownership: Marketing

Stage Description: At this point in the journey, the Prospect knows _____ and has engaged with valuable content. However, they have not identified themselves.

After the Prospect engages, they identify themselves by making an exchange.

In exchange for their contact information and permission to communicate with them in the future, they **subscribe** to even more relevant and valuable information.

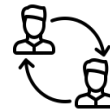
VALUE CHAIN

Subscribe Steps

- 1)
- 2)
- 3)
- 4)
- 5)

Stage 4: Convert

Ownership: Sales Development



Stage Description: The moment when the Prospect invests time or a small amount of money because there is an asymmetric value proposition - tremendous value with little skin in the game.

The Prospect makes a significant commitment to talk with somebody about their finances.

The **convert** stage is the pivot point that signals trust and credibility in the brand and how it's products and services can help them.

Convert Steps

- 1)
- 2)
- 3)
- 4)
- 5)

Stage 5: Excite



Ownership: Sales

Stage Description: The Prospect becomes **excited** by connecting an even better financial life to the implementation of our products and services.

They experience an organized, thoughtful, and relevant process that consists of meaningful conversation, practical tools, and expert guidance.

The presentation of solutions and recommendations are simple, clear, and personalized.

The Prospect understands how and why a relationship with _____ will benefit them and are **excited** to move forward.

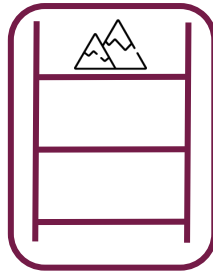
The **Excite** stage of the Value Journey is not a singular event. Current Clients will consistently come back to the **excite** stage as a result of new content that meets their needs and align with their values.

VALUE CHAIN

Excite Steps

- 1)
- 2)
- 3)
- 4)
- 5)

Stage 6: Ascend



Ownership: Sales

Stage Description: The Prospect implements the recommended products and services and becomes a Client.

In the **Ascend** stage of the journey, trust, credibility, expert guidance, and relevant recommendations all converge to compel the Prospect to move forward.

The **Ascend** stage is a ladder by design. The ladder represents both the initial value of the _____ products and services as well as new forms of value that align with their evolving needs, objectives, goals, and desires - getting them closer to their dreams.

Current clients return and implement additional products and services.

[VALUE CHAIN](#)

Ascend Steps

- 1)
- 2)
- 3)
- 4)
- 5)

Stage 7: Advocate



Ownership: Sales & Marketing

Stage Description: This stage of the value journey is when the typical Client becomes a **Raving Fan**.

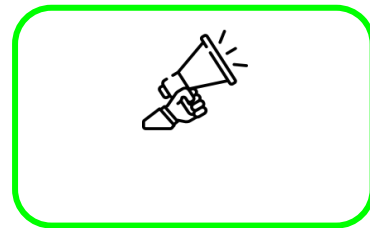
The **Advocate** is a passive promoter and responds favorably to a request for a testimonial or referral.

When requests are made, the client **advocates** by providing testimonials about their experience and/or referring their family, friends, and professional network.

Advocate Steps

- 1)
- 2)
- 3)
- 4)
- 5)

Stage 8: Promote



Ownership: Sales & Marketing

Description: Clients who **promote** are different from advocates.

When an audience of Prospects become aware of _____ from a **Promoter**, there is built in trust and credibility.

These valuable clients actively seek to share their experience with the brand, details of the wealth strategies, products, or services. They actively share it with their family, friends, and professional relationships.

In specific situations, they may **promote** because there is an incentive.

VALUE CHAIN

Promote Steps

- 1)
- 2)
- 3)
- 4)
- 5)