

# CHECKLIST

## Client Experience Checklist

Take a quick look at your client experience from start to finish. Check what is working, notice what could be easier, and choose a few small improvements to take.

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### 1. Getting Started

Think about what happens from the first inquiry until a new client is fully set up.

- ☐ I respond to inquiries within a reasonable amount of time.
- ☐ My proposal, agreement, and pricing are clear.
- ☐ New clients know exactly what they need to provide.
- ☐ I have a consistent onboarding process.

Something I could make easier: \_\_\_\_\_

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### 2. Working Together

Think about what it feels like to be an established client.

- ☐ Clients know the best way to contact me.
- ☐ Clients know when they can expect a response.
- ☐ My requests are easy to understand and act on.
- ☐ I communicate important deadlines or changes in advance.
- ☐ My processes are consistent from month to month.

Something I could make clearer: \_\_\_\_\_

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### 3. Staying Connected

Good client communication isn't only about asking for documents or sending reports.

- ☐ I communicate with clients even when I don't need something from them.
- ☐ I explain information in language my clients understand.
- ☐ I share useful reminders or information when appropriate.
- ☐ Clients understand the value of the work I'm doing for them.
- ☐ I periodically check in to see how things are going.

One way I could stay better connected: \_\_\_\_\_

## 4. The Little Things

Small details can make working with you feel easier and more professional.

- ☐ My emails and documents are easy to read.
- ☐ Links, forms, and instructions are easy to find.
- ☐ Clients aren't repeatedly asked for the same information.
- ☐ I follow up when I say I will.
- ☐ My processes feel organized from the client's point of view.

One small frustration I could remove: \_\_\_\_\_

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## Your Client Experience Action Plan

You don't need to change everything at once. Look back over your checkup and choose three small improvements that would make the biggest difference.

1. Make this easier: \_\_\_\_\_

My next step: \_\_\_\_\_

2. Make this clearer: \_\_\_\_\_

My next step: \_\_\_\_\_

3. Make this more consistent: \_\_\_\_\_

My next step: \_\_\_\_\_

Choose one to start with. Small improvements add up to an experience that feels easier for your clients and easier for you to manage.