



BUILDING A CLIENT SERVICE PLAN

GETTING STARTED

Creating a system for developing your CAS practice can be overwhelming, and developing tailored service plans for your client’s business is another large undertaking. To simplify the process, following a structured process will help keep you organized. Start by asking these questions:

- 1. Client Information:** Who are your typical clients? What are their needs and expectations?
- 2. Service Details:** What services do you offer to clients? How will you deliver these services? What is your pricing model?
- 3. Communication:** How do you communicate with your clients? What channels do you use?
- 4. Goals & Metrics:** What are your goals for client satisfaction and retention? What metrics will you use to measure success?
- 5. Feedback & Improvement:** How do you gather feedback from clients? How will you improve your services based on feedback?

BUILDING THE PLAN: KEY ELEMENTS

An advisor should include several key components in a client service plan tailored for a business owner. Below are the essential elements:

Introduction & Overview

Objective
Service Agreement

Service Offerings

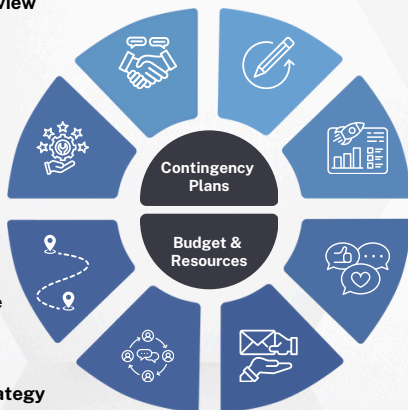
Products & Services
Customization Options

Client Journey Map

Touchpoints
Ideal Client Experience

Communication Strategy

Channels & Frequency
Content



Review & Updates

Regular Reviews
Update Processes

Performance Metrics

Key Performance Indicators (KPIs)
Monitoring & Reporting

Client Feedback & Improvement

Feedback Mechanisms
Improvement Plan

Service Delivery

Processes & Procedures
Technology & Tools

IMPLEMENTATION: BEST PRACTICES

- 1 Preparation & Planning**
 - Review the plan.
 - Assign roles and responsibilities.
 - Set up resources.
- 2 Communication & Training**
 - Communicate the plan to your team.
 - Conduct training sessions for staff.
 - Provide detailed documentation and guidelines for reference.
- 3 Delivery & Client Journey**
 - Deliver services as outlined in the plan and ensure customization options are available.
 - Guide interactions at each touchpoint.
 - Regularly provide valuable content to clients.
- 4 Monitoring & Reporting**
 - Monitor KPIs to measure relevant metrics.
 - Create and review regular reports to track progress and identify areas for improvement.
 - Make data-driven adjustments to the plan as needed.
- 5 Review & Update**
 - Schedule regular reviews of the client service plan to ensure it remains relevant and effective.
 - Make updates to the plan based on changing client needs, business goals, or market conditions.

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