

Client Journey Mapping Workshop

Client journey mapping is a process that identifies the **steps, thoughts,** and **emotions** that potential clients experience, across various channels, in engaging your company's services.

Told from the client's point of view, the mapping process can encompass the entire life cycle, from the moment a prospective client identifies they have a need, to the point they engage your services, through the long-term relationship they establish with your firm. Alternatively, the map can comprise just one segment of the journey, such as the steps a client takes from making initial contact with your firm to deciding to engage your services.

By mapping the client journey, you will better understand the process a potential client embarks on before choosing your services. You will identify the motivations, expectations, thoughts, and emotions of a client at each step, pinpointing opportunities for meaningful touchpoints from your firm along their journey.

In mapping the client journey, you can expect to:

- Chart the emotions, thought process, and actions of a client throughout the journey, allowing you to empathize with their situation and provide resources and messages that will resonate with them
- Plan a comprehensive, multi-channel strategy that offers touchpoints along the journey, allowing you to stay connected throughout the decision-making process
- Identify a prospect's decision-making moments that present opportunities for your firm to convert them to a client
- Develop stage-appropriate campaigns and communication materials that address solutions for their pain points

How It Works

Kaleido Creative Studio's Client Journey Mapping Workshop comprises three stages:

PRE-WORKSHOP PREPARATION (APPROXIMATELY 4 WEEKS)

The pre-workshop preparation is focused on defining the client we will focus on in the workshop:

- Develop an ideal client profile for one client type
- Conduct market research on the top financial challenges facing your ideal client
- Develop a persona (a fictional representation of the ideal client)
- Complete an empathy map

WORKSHOP (UP TO 4 HOURS)

We conduct either an in-person workshop at your office or a virtual workshop via video conferencing in which we lead a discussion that maps the client journey:

- Define the phases of the journey
- Identify the steps the client is taking at each phase of the journey
- Identify what the client is thinking and feeling at each phase
- Identify the potential touchpoints with your firm
- Quantify the emotional journey

POST-WORKSHOP FOLLOW-UP (APPROXIMATELY 2 WEEKS)

We summarize the results of the workshop and provide deliverables that allow you to take action in implementing the map:

- Create a visual client journey map based on the results of the workshop
- Develop a list of action items to implement based on the outcome of the workshop

Deliverables

- 1 persona
- 1 client journey map
- 1 priority marketing action item list that can serve as the baseline for a marketing plan

Price

Virtual workshop: \$3,500

In-person workshop:
\$5,000 plus travel costs
for two people

Get Started!

To schedule your workshop, email info@kaleidocreative.com for potential dates.