HOW CLIENT ENGAGEMENT IS BEING *DISRUPTED*

Julie Littlechild
CEO & Founder, Absolute Engagement
jlittlechild@absoluteengagement.com
If most clients are satisfied, satisfaction doesn’t set you apart.
If we spend all our time trying to *improve*, we may miss the opportunity to *innovate*.
**My Starbucks Idea**

Got an Idea?  View Ideas  Ideas in Action

Hi there, 

**Ideas so far**

Search Ideas

**PRODUCT IDEAS**

<table>
<thead>
<tr>
<th>Idea Category</th>
<th>Votes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coffee &amp; Espresso Drinks</td>
<td>47,499</td>
</tr>
<tr>
<td>Frappuccino® Beverages</td>
<td>7,205</td>
</tr>
<tr>
<td>Tea &amp; Other Drinks</td>
<td>14,358</td>
</tr>
<tr>
<td>Food</td>
<td>26,588</td>
</tr>
<tr>
<td>Merchandise &amp; Music</td>
<td>11,752</td>
</tr>
<tr>
<td>Starbucks Card</td>
<td>24,754</td>
</tr>
<tr>
<td>New Technology</td>
<td>6,617</td>
</tr>
<tr>
<td>Other Product Ideas</td>
<td>15,242</td>
</tr>
</tbody>
</table>

**SHARE, VOTE, DISCUSS, SEE.**

Share your ideas, tell us what you think of other people's ideas and join the discussion.

**EXPERIENCE IDEAS**

<table>
<thead>
<tr>
<th>Idea Category</th>
<th>Votes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ordering, Payment, &amp; Pick-Up</td>
<td>13,410</td>
</tr>
<tr>
<td>Atmosphere &amp; Locations</td>
<td>26,163</td>
</tr>
<tr>
<td>Other Experience Ideas</td>
<td>15,974</td>
</tr>
</tbody>
</table>

**INvolVEMENT IDEAS**

<table>
<thead>
<tr>
<th>Idea Category</th>
<th>Votes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building Community</td>
<td>7,252</td>
</tr>
<tr>
<td>Social Responsibility</td>
<td>12,075</td>
</tr>
<tr>
<td>Other InvolVement Ideas</td>
<td>7,054</td>
</tr>
<tr>
<td>Outside USA</td>
<td>2,657</td>
</tr>
</tbody>
</table>
Welcome to Marriott Hotels, where new people, places and ideas will spark new ways of thinking and broaden your perspective. Scroll down for stories that will inspire new insights for your journey.
COME OVER HERE

HOW?
Here’s How....

1. Understand and Involve
2. Design
#1 UNDERSTAND AND INVOLVE: INVITE INPUT
Don’t ask how you should design your client experience.

Ask what they need, where they are challenged and how they define extraordinary.

It’s your job to close the gap.
Leadership

Offer

Service

Challenges

Needs

Expectations
Feedback vs. Input
Instead of asking what can we offer to clients in order to drive engagement, we need to change the question to ask what we can create with clients in order to drive engagement.
Ways to Invite Input

- Interviews
- Client/Donor think tank
- Advisory board
- Survey
Questions

• How are you feeling (right now)?
• Where are you challenged?
• What are you interested in learning about?
• What do you need?
• What do you expect?
### Example: Understand Needs.....

<table>
<thead>
<tr>
<th>Topic</th>
<th>Percent responding ‘yes’</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintaining sufficient assets to meet lifetime income needs</td>
<td>39%</td>
</tr>
<tr>
<td>Coping with a significant market downturn</td>
<td>36%</td>
</tr>
<tr>
<td>Education on investments or the markets</td>
<td>32%</td>
</tr>
<tr>
<td>Dealing with the rising costs of health/long-term care</td>
<td>29%</td>
</tr>
<tr>
<td>Ensuring my partner/spouse is taken care of should I pass away first</td>
<td>28%</td>
</tr>
</tbody>
</table>

Q: Which topics would you be interested in learning more about from your advisor? Please select all that apply.

Source: 2020 Investor Research, Investments & Wealth Institute and Absolute Engagement
...But Recognize They Change

<table>
<thead>
<tr>
<th>Topic</th>
<th>Percentage saying “yes” March 10-11</th>
<th>Percentage saying “yes” March 16-24</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health and wellness</td>
<td>19%</td>
<td>48%</td>
</tr>
<tr>
<td>Thinking about second careers</td>
<td>12%</td>
<td>23%</td>
</tr>
<tr>
<td>Caring for aging parents</td>
<td>12%</td>
<td>21%</td>
</tr>
<tr>
<td>Helping children make better financial decisions</td>
<td>24%</td>
<td>32%</td>
</tr>
<tr>
<td>Education on investments and markets</td>
<td>30%</td>
<td>38%</td>
</tr>
<tr>
<td>Leaving a financial legacy for a charity</td>
<td>20%</td>
<td>26%</td>
</tr>
<tr>
<td>Finding volunteer opportunities</td>
<td>11%</td>
<td>17%</td>
</tr>
</tbody>
</table>

Q: Which topics would you be interested in learning more about from your advisor? Please select all that apply.

Source: 2020 Investor Research, Investments & Wealth Institute and Absolute Engagement
Managing stress during a crisis

James,

Part of the reason we are all experiencing stress is because we don’t feel we are doing enough. But, sometimes, I think we are doing more than enough.

I thought this article, from the New York Times, made a great case that we should stop putting so much pressure on ourselves. Stop Trying to Be Productive

Take Care,
Advisor Name

P.S. If the link above doesn’t work, you can copy and paste this full link into your browser. https://www.nytimes.com/...
#2 DESIGN: MAP OUT THE DONOR JOURNEY
A client journey map provides a single view of the experience, **through the eyes of the client/donor**, using his or her motivations and challenges to trigger opportunities to engage and to innovate.
1. Who are you designing the client experience to support?

2. What stages does that client go through on his or her journey?

3. What is that client thinking, feeling or doing at each stage?

4. How can you actively support clients at each stage, based on that insight?
You cannot craft a meaningful, connected, engaging experience that meets the needs of everyone.
Creating a “Persona”

• Where do they live?
• What do they do for a living?
• What is their level of education
• How would you describe their attitudes and beliefs?
• How would you describe their lifestyle?
• What are the interests and hobbies?
• What do they want from your organization?
• Why do they give?
• What do they want from life?
• What are their biggest challenges/concerns?
Beyond the Donor

- Are they active participants in decision-making?
- Do they influence decision-making or client goals?
- Do they need to be kept up to date or otherwise involved?
1. Who are you designing the client experience to support?

2. What stages does that client go through on his or her journey?

3. What is that client thinking, feeling or doing at each stage?

4. How can you actively support clients at each stage, based on that insight?
What are they thinking, feeling and doing?
At Each Stage...

✓ What questions do they have?
✓ What concerns might they have?
✓ What information do they need?
✓ Who is involved in decision-making?
✓ What are the touch points with the organization?
✓ What are their pain points?
Welcome.
Please click here to download our latest report:
*The Top 10 Resources for Family Owned Businesses*

Thanks for your interest. Can I ask you one question? Which of the following is your biggest challenge today?

- Cash flow management
- Developing the next generation
- Building long-term value
- Custom follow-up with report
- Custom follow-up with report
- Custom follow-up with report
- Custom follow-up with article #1
- Custom follow-up with article #2
- Custom follow-up with article #3

www.AbsoluteEngagement.com
From: John Smith  
Date: August 25, 2018  
To: James and Nicole Carter  
Subject: Follow-up to our meeting

Thanks so much for taking the time to meet. I know you may have many questions and I’ve pulled together the answers to some of those here.

What you need to know about planning for retirement.

From: John Smith  
Date: August 25, 2018  
To: James and Nicole Carter  
Subject: Follow-up to our meeting

As a the owners of a family business, you have unique needs and challenges – and you aren’t alone. Click below to hear what we’ve learned from working with business owners just like yourself.

Top 3 personal finance challenges for business owners.

From: John Smith  
Date: August 25, 2018  
To: James and Nicole Carter  
Subject: Follow-up to our meeting

When we met, we talked about working to bring a shared vision to life. This might get you started on crafting that vision together.

3 questions to talk about (as a couple) about your financial future.

www.AbsoluteEngagement.com
Anticipate Needs

1. Welcome message from President
2. Follow-up from client service associate
3. Initial statement follow-up from advisor
4. New client survey
ABC Foundation

1. Best ways or resources to help your children understand the importance of giving back.

2. What one thing have you done differently to support your local community since March 2020?
WHO the experience designed to support

WHAT they thinking, feeling and doing

HOW you support them through client communications
HOW CLIENT ENGAGEMENT IS BEING DISRUPTED

BREAKOUT

Julie Littlechild
CEO & Founder, Absolute Engagement
jlittlechild@absoluteengagement.com
How do you believe the donor experience needs to change going forward?

What one thing have you done to enhance the donor experience?

What do you believe you most need to improve when it comes to the donor experience?
AN EXTRAORDINARY CLIENT EXPERIENCE

1. Define your niche or ideal client
2. Define your core processes
3. Segment your clients based on value
4. Define your offer, by segment
5. Assess your capacity and profitability
6. Map out the client journey
7. Create the client communications plan
8. Map out the client experience
9. Structure the business around ideal client
10. Manage client expectations
11. Gather client feedback
Donor Challenge Challenge Challenge Challenge Challenge Challenge Challenge Challenge