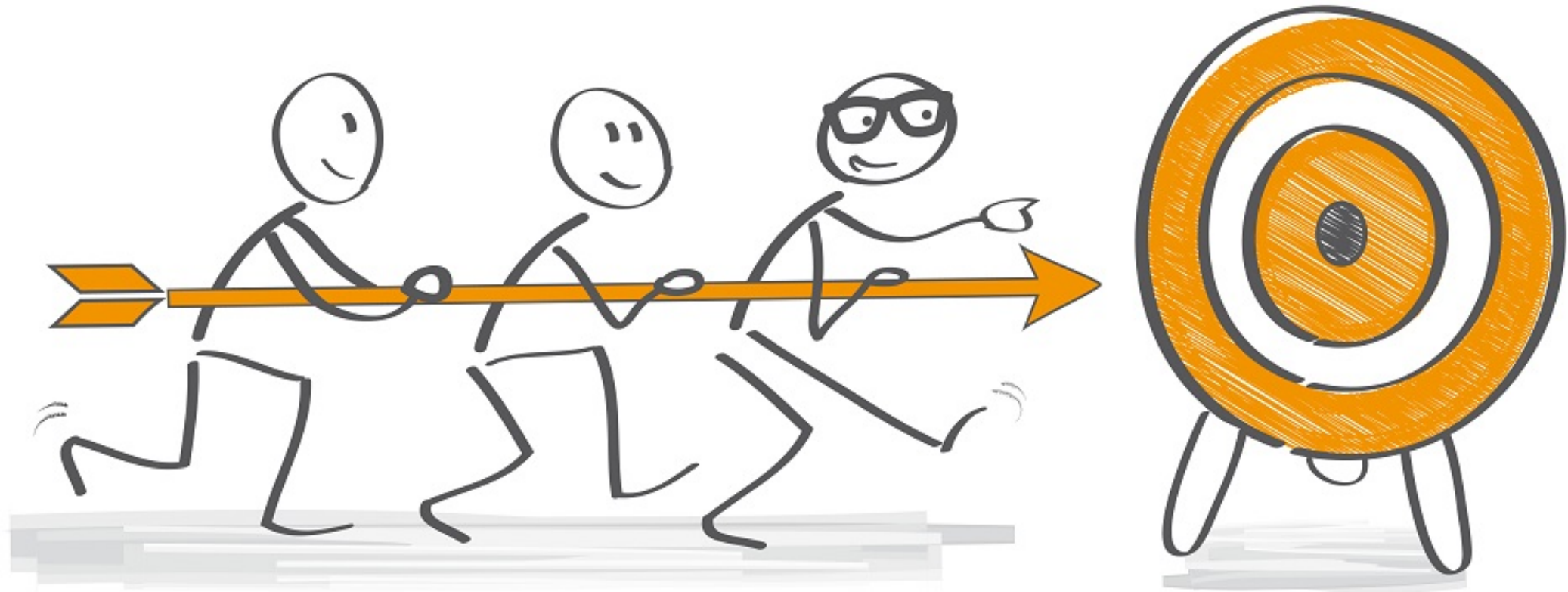


A large red L-shaped graphic frames the text. It consists of a vertical bar on the left and a horizontal bar at the top, meeting at the top-left corner. Another vertical bar is on the right and a horizontal bar is at the bottom, meeting at the bottom-right corner.

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

FAQ

[GOT AN IDEA?](#) [VIEW IDEAS](#) [IDEAS IN ACTION](#)

Hi there, [Sign In](#) to make a comment.

Ideas so far

Search Ideas



PRODUCT IDEAS

- 47,499 [Coffee & Espresso Drinks](#)
- 7,105 [Frappuccino® Beverages](#)
- 14,358 [Tea & Other Drinks](#)
- 24,588 [Food](#)
- 11,752 [Merchandise & Music](#)
- 24,754 [Starbucks Card](#)
- 6,617 [New Technology](#)
- 15,242 [Other Product Ideas](#)



EXPERIENCE IDEAS

- 13,410 [Ordering, Payment, & Pick-Up](#)
- 26,163 [Atmosphere & Locations](#)
- 15,974 [Other Experience Ideas](#)

INVOLVEMENT IDEAS

- 7,252 [Building Community](#)
- 12,075 [Social Responsibility](#)
- 7,054 [Other Involvement Ideas](#)
- 2,657 [Outside USA](#)



TRAVEL BRILLIANTLY

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.



READ MORE





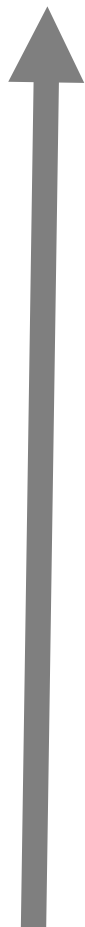
BOOK
NOW







Engagement



Satisfaction



Leadership

Offer

Service



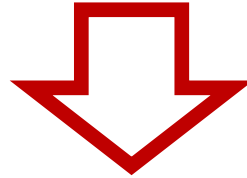
Here's How....

1. Understand and Involve
2. Design

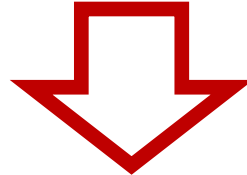
A person is holding a tablet computer. The screen of the tablet is the central focus, displaying a large, light-colored question mark icon. The person's hands are visible on the left and right sides of the tablet. The background is dark and out of focus. The text is overlaid on the screen area.

**#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



Challenges

Offer



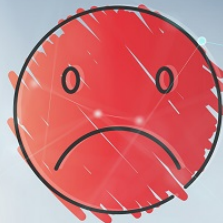
Needs

Service



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.....

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

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

...But Recognize They Change

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

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

Managing stress during a crisis



Julie Littlechild
To Julie Littlechild

James,

Part of the reason we are all experiencing stress is because we don't feel we are doing enough. But, sometimes

I thought this article, from the New York Times, made a great case that we should stop putting so much pressure

[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/2020/04/01/well/mind/stop-trying-to-be-productive.html>

Stop Trying to Be Productive

The internet wants you to believe you aren't doing enough with all that "extra time" you have now. But staying inside and attending to basic needs is plenty.



Raz Latif



By Taylor Lorenz

April 1, 2020



When Dave Kyu, 34, an arts administrator in Philadelphia, realized that he would be working from home for the foreseeable future, he

Reply All

→ Forward



Thu 4/30/2020 2:08 PM

ore than enough.

A red pushpin is pinned to a map, with its sharp point resting on a yellow highlighted path. The map shows various streets and landmarks, though they are slightly out of focus. The background is a dark, semi-transparent grey.

#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?



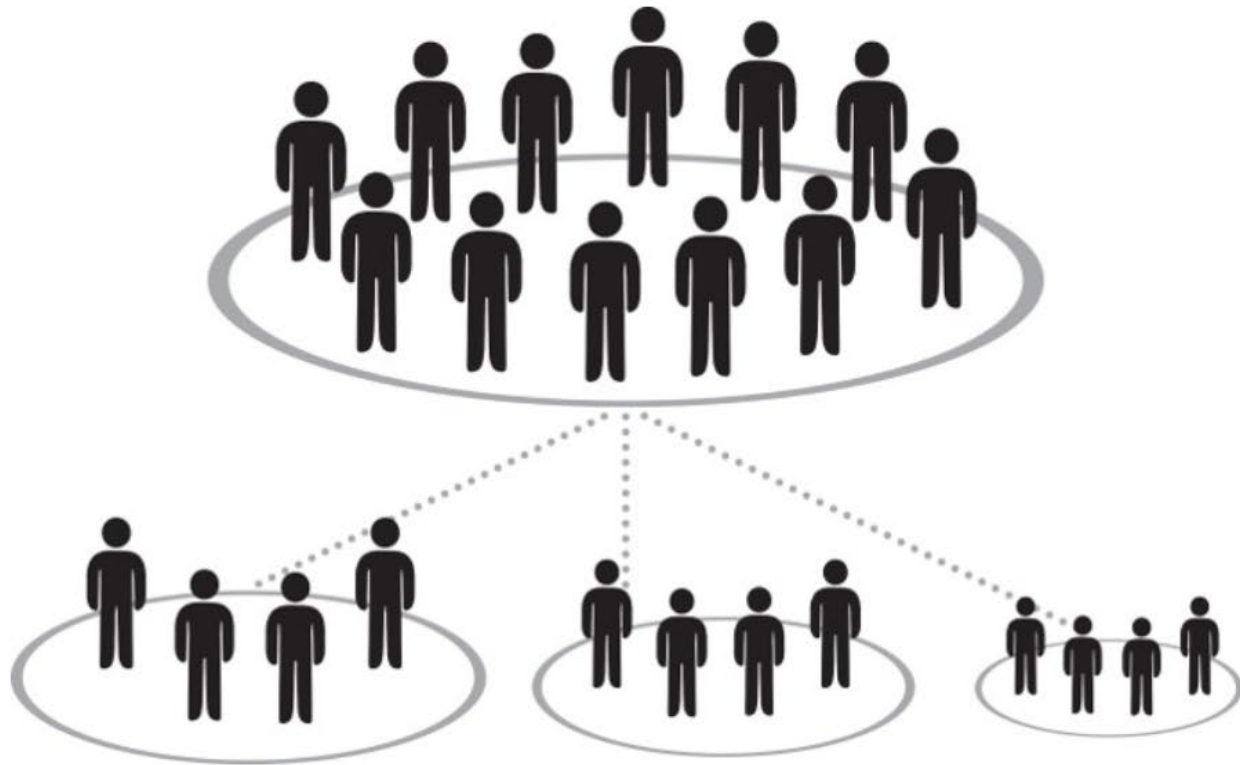
3

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?



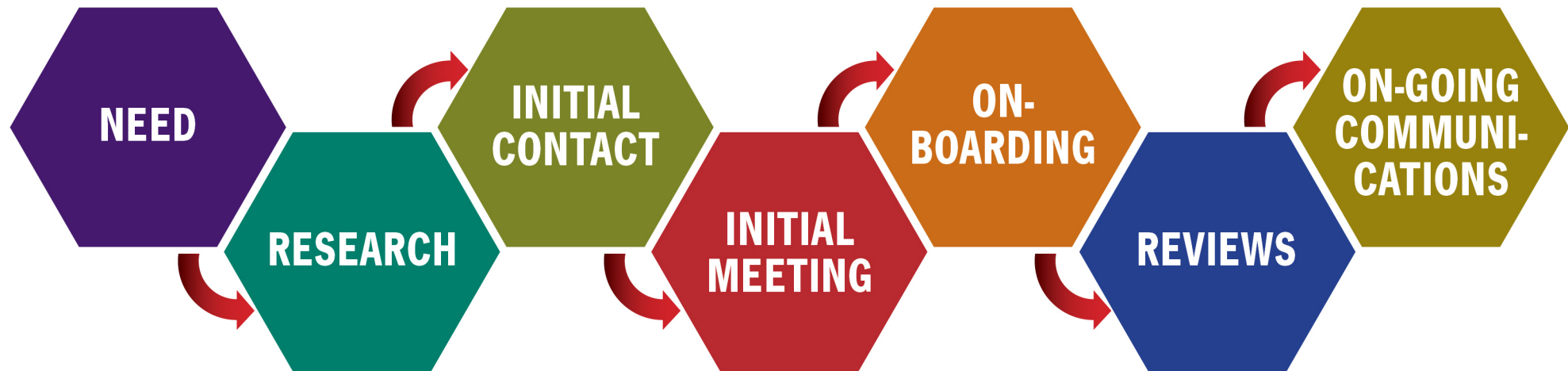
3

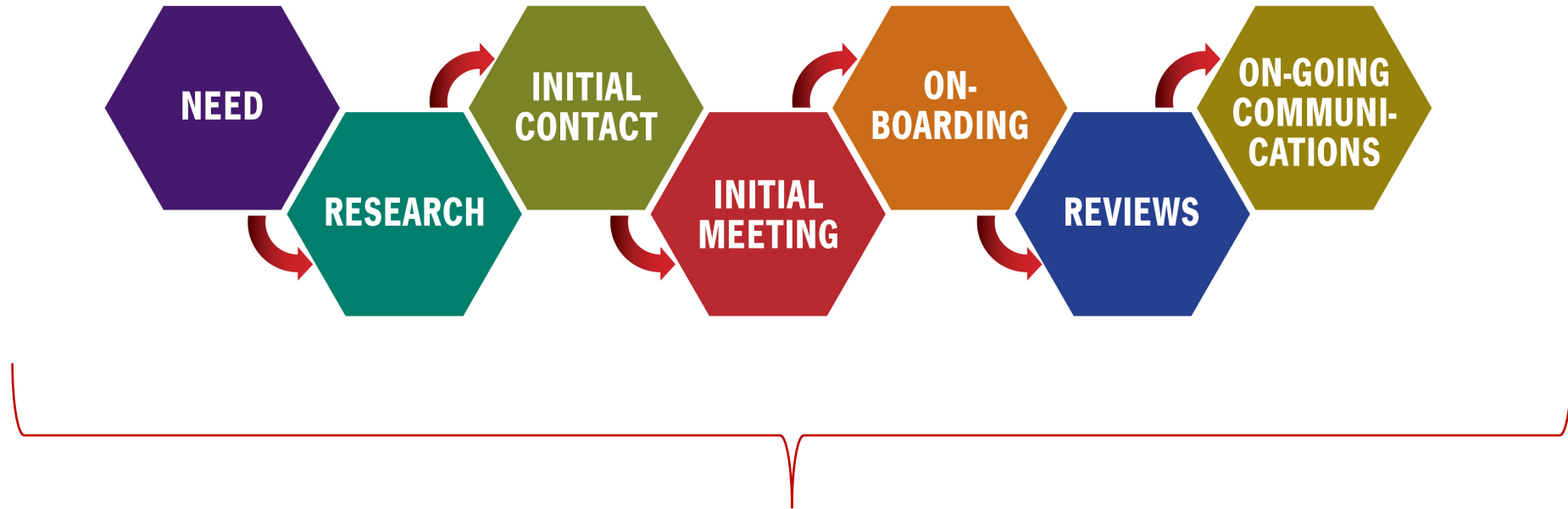
What is that client thinking, feeling or doing at each stage?



4

How can you actively support clients at each stage, based on that insight?

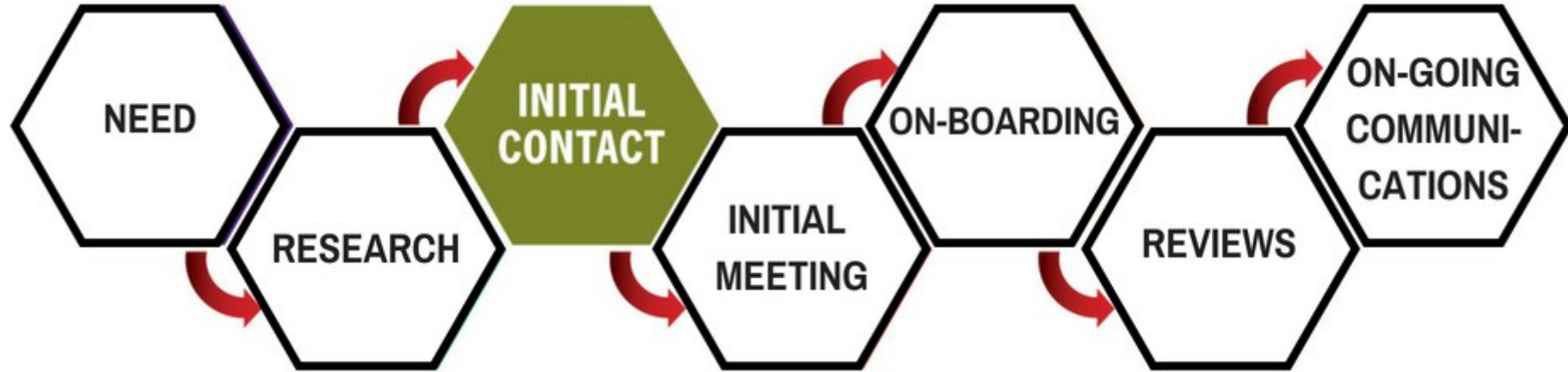




What are they thinking, feeling and doing?

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

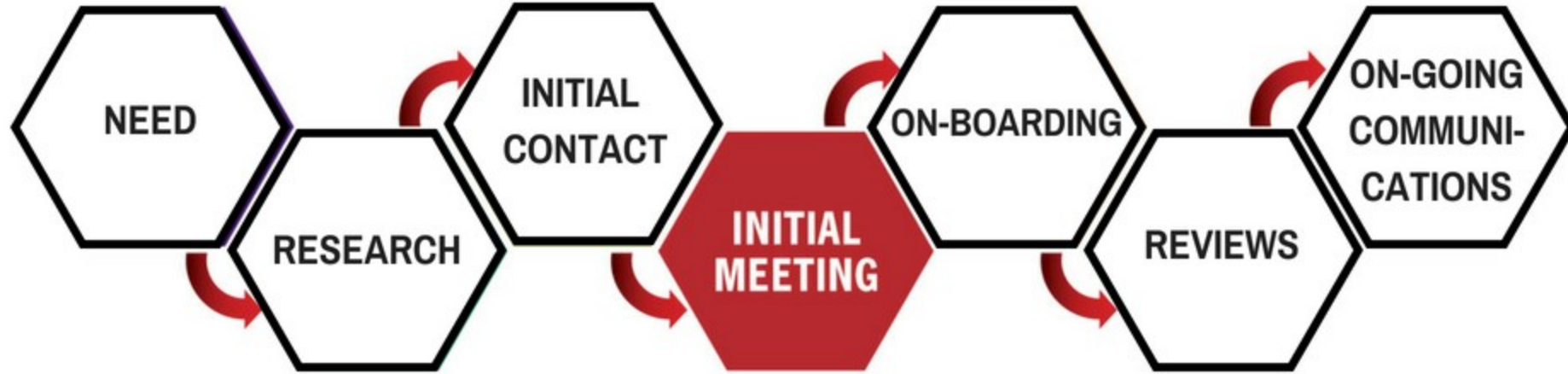
Custom follow-up with report

Custom follow-up with report

Custom follow-up with article #1

Custom follow-up with article #2

Custom follow-up with article #3



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..



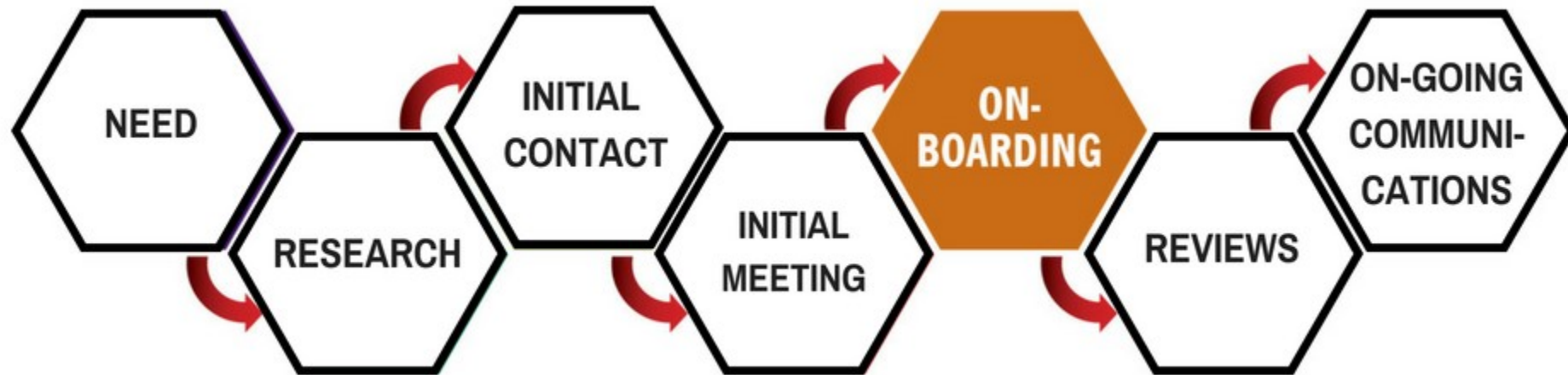
Top 3 personal finance challenges for business owners.

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.

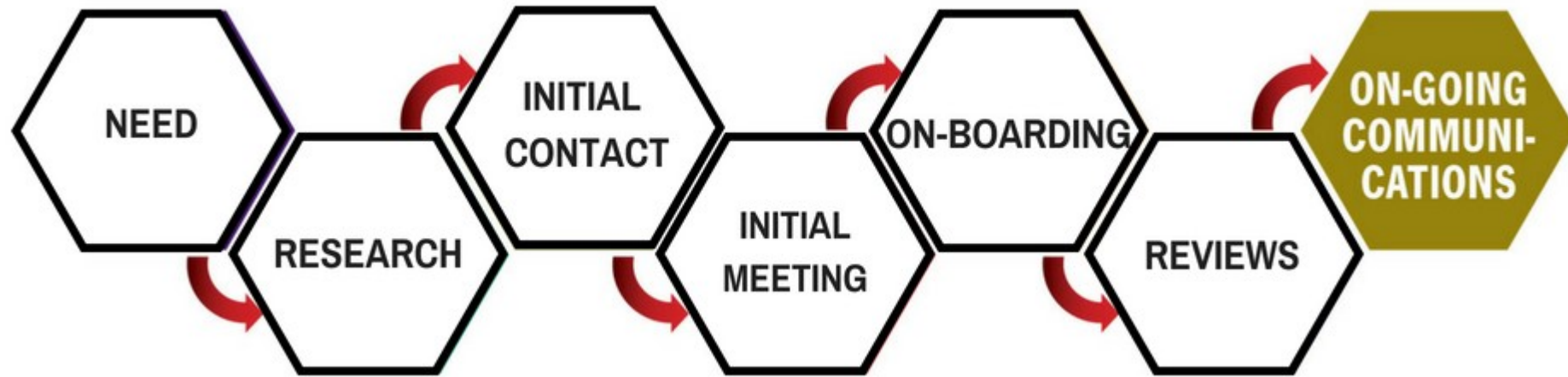


Anticipate Needs

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



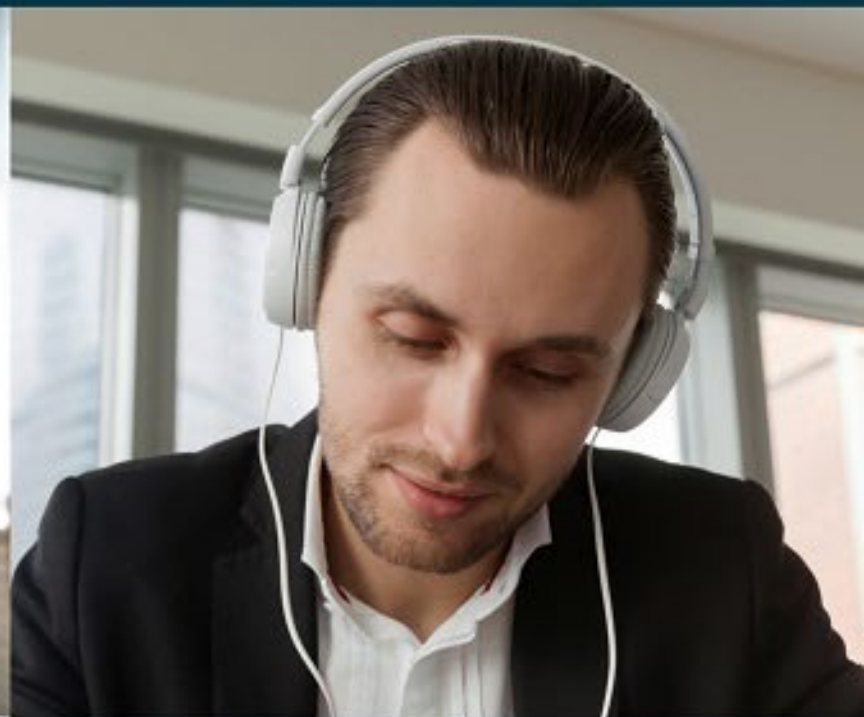
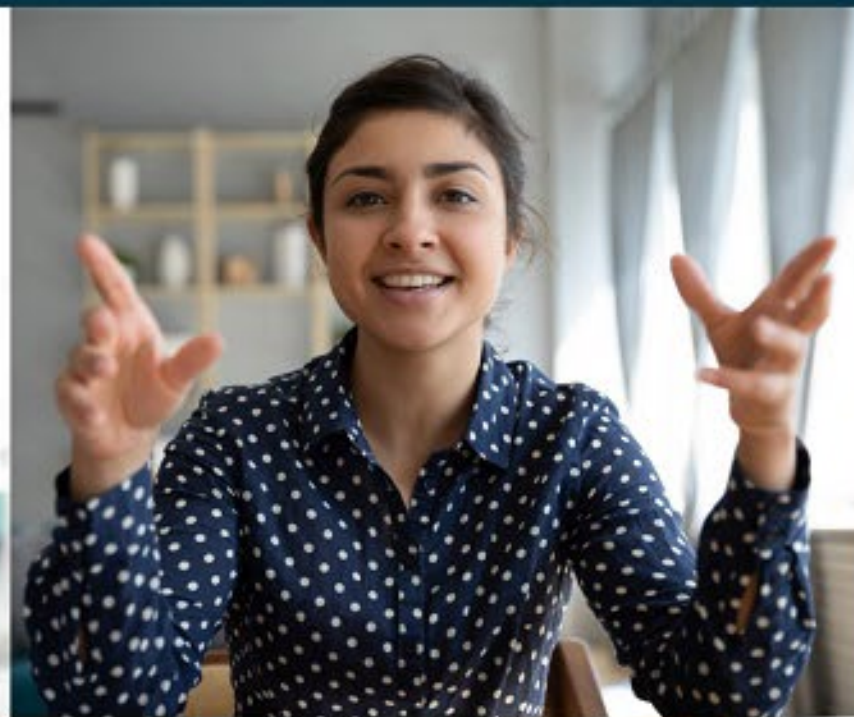
THE RITZ-CARLTON®

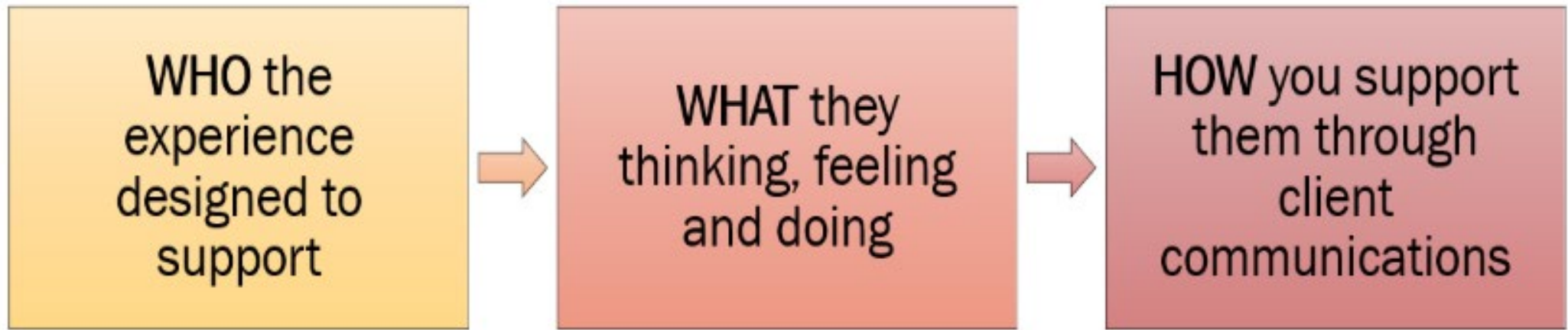


ABC Foundation

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?







jlittlechild@absoluteengagement.com

A large red L-shaped graphic frames the text. It consists of a thick red horizontal bar at the top left, a thick red vertical bar on the left side, and a thick red horizontal bar at the bottom right.

HOW CLIENT ENGAGEMENT IS BEING *DISRUPTED* *BREAKOUT*

Julie Littlechild

CEO & Founder, Absolute Engagement
jlittlechild@absoluteengagement.com



How Client Engagement is Being Disrupted

2020 Community Foundation Virtual Workshop
Breakout Session Workbook

Facilitator:
Julie Littlechild
Founder & CEO, 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?



