

All The Things I Do



The Ultimate Checklist to Providing a 5-Star Client Experience Online

The Ultimate Checklist to Providing a 5-Star Client Experience Online



I've always been a bit of an overachiever. I get bored way too easily and get a buzz from checking shit off my to-do list seriously it's almost as good as wine. This wasn't as big of a deal when I had the energy of a 22-year-old. But as I entered the latter part of my 20s balancing a full-time marketing job, freelancing and trying to start my own business, date, make time for family and friends, eat...basically all the things I knew something had to give. I couldn't go on staying up till the crack of dawn and then waking up a few hours later to do it all over again. I set up systems, got my butt in gear and improved my situation with accountability and organization. Afterwards, I was able to spend less of my hours working, grow my audience and break the income ceiling I had hit with my blog. I'm not some magical genie. I'm just a girl (boss) standing in front of a boy computer asking you to trust me. I have been there, those long nights.

I am the proud owner of a very expensive piece of paper that says something about Communication with a concentration in public relations. I keep it in a frame above my fireplace. I've worked in retail, food service, insurance, had to wrangle multiple real estates agents as marketing director and event coordinator and now on top of working with clients as a productivity coach and project manager, I am on a team that masterfully manages 30+ clients a day as a digital marketer.

The Ultimate Checklist to Providing a 5-Star Client Experience Online

- ❑ Program platform to house your program.
- ❑ Client specialist to handle client concerns.
- ❑ FAQ page/Information bank to house all the links and information clients may misplace.
- ❑ An email system to organize workflows and send mass communications.
- ❑ Scheduling and CRM system (Customer Relationship Manager) to house all of your client information and make sure everyone is on the same page.
- ❑ An internal calendar so you can make sure your personal life and your business life don't double book you.
- ❑ A clear process path so your clients can know what to expect and when to expect it.
- ❑ Progress tracker that allows your customers and you to keep track of their big wins.
- ❑ A community that allows clients to communicate and work together for more success.
- ❑ Payment portal so you can keep investing in your business.
- ❑ Contract that lays everything out so there are no surprises.

Take your client experience to the next step. Answer the questions before they ask. Keep them happy and coming back for more.

[Click here to start delivering
a 5-Star Client Experience.](#)