UMBREX

Client Experience Checklist

Proposal Phase

- ☐ Provide value & work towards a solution in the first meetings
- ☐ Ensure your website, email, branding & LinkedIn profile are optimized
- ☐ Provide a booking link in your email & collateral
- ☐ Hold a Context Discussion
- ☐ Send a recap email
- ☐ Organize documents & project list
- ☐ Follow up with potential client
- ☐ Establish pricing structure & fees
- ☐ Send the contract
- ☐ Ask for feedback if you don't win the project

Kick-off Phase

- ☐ Schedule meeting with client lead
- ☐ Schedule team kick-off meeting
- ☐ Request data if needed
- ☐ Announce project to client organization
- ☐ Set up work space if on-site
- ☐ Set up housekeeping protocols
- ☐ Complete your vendor set-up

Execution Phase

- ☐ Schedule key dates
- ☐ Ask for introduction to client collaborators
- ☐ Create interactive presentations, and/or adopt client's preferred format
- ☐ Make team members aware of your open door policy
- ☐ Be a good guest (observe client dress code, give credit to team members, etc.)
- ☐ Show that you value the client's advice & ask for feedback
- ☐ Share a meal

Wrap-up Phase

- ☐ Package the final deliverables in a folder of key files with directory
- ☐ Help client plan next steps & key actions past the project end date
- ☐ Schedule a follow-up call or meeting
- ☐ Give & receive feedback about the project
- ☐ Submit your invoice promptly
- ☐ Clean out on-site space if applicable

Post-project Phase

- ☐ Send a thank you note & possibly a gift
- ☐ Publish a case study
- ☐ Write a LinkedIn recommendation of the client

Read the full article here