Step 1: Analyze
- ★ Tool: Client Scorecard
- ★ Tool: Question Guide for Defining your Segmentation Criteria
- ★ Tool: Segmentation Criteria – Best Clients
- ★ Tool: Defining Your Ideal Client Relationship
- ★ Tool: Opportunity List
- ★ Tool: Elimination List

Step 2: Assemble
- ★ Tool: Client Experience Ideas
- ★ Tool: Client Experience Observations & Suggestions
- ★ Tool: Skeleton Communication Plan
- ★ Tool: Appreciation Brainstorming
- ★ Tool: Service Menu

Step 3: Assemble
- ★ Tool: Resource Brainstorming
- ★ Tool: Library of Resources
- ★ Tool: Question Guide Resources
- ★ Tool: External Resource Letter
- ★ Sample: Client Service Job Description

Step 4: Activate
Creating Your Long-Term Service Calendar
- ★ Brainstorm: Topics for Connection Opportunities
- ★ Sample: 12-Month Service Calendar Plan
- ★ Checklist: 1st of the Month To-Dos for Service Associate
- ★ Checklist: Monday To-Dos for Service Associate

Introducing Your New *5-Star Service* Plan to CURRENT Clients
- ★ Letter: Invitation for Commitment Meeting
- ★ Sample: Getting to Know You Form – Interests/Hobbies/Passions
- ★ Script: Commitment Meeting
- ★ Sample: Service Agreement
- ★ Letter: Thank You for Commitment Meeting
- ★ Letter: Phase-In New Service (

Introducing Your New *5-Star Service* Plan to Prospects

Introducing Your New *5-Star Service* Plan to NEW Clients
- ★ Sample: Welcome Packet Ingredients
- ★ Letter: Team Welcome
- ★ Letter: Service Associate Welcome
- ★ Script: Establish Commitment Meeting
- ★ Script: Commitment Meeting
- ★ Script: Statement Follow-Up Communication
- ★ Letter: Internet Access – Web Registration Communication

- ★ Letter: Accurate Reporting Communication
- ★ Script: Important Documentation & Introduction to Estate Planning
- ★ Checklist: Estate Planning
- ★ Sample: Estate Planning Account Tracking Tool
- ★ Checklist: New Client

Client Meetings
- ★ Letter: Schedule Appointment
- ★ Letter: Appointment Confirmation
- ★ Sample: Meeting Agenda
- ★ Checklist: Meeting Appointment
- ★ Sample: Client Appointment Discovery and Notes
- ★ Letter: Follow-Up Thank You

Client Profiling
- ★ Sample: Profiling Campaign
- ★ Client Profiling Delivery Method: Mail
- ★ Letter: Profile/Update Request
- ★ Client Profiling Delivery Method: Telephone Interview/Script
- ★ Client Profiling Delivery Method: In-Person Meeting
- ★ Sample: Client Update Form
- ★ Sample: Profiling Questions

Additional Tools
- ★ Brainstorm: Ideas for Standardized Letters and Scripts
- ★ Sample: Tool to Track Cost of Client Appreciation & Gifts
- ★ Checklist: Client Event
- ★ Checklist: Items to Bring to Client Event

Step 5: Assess

Client Feedback and Assessments
- ★ Client Satisfaction Survey Campaign Instructions
- ★ Letter: Client Satisfaction Survey
- ★ Sample: Client Satisfaction Survey
- ★ Letter: Thank You & Follow-Up to Client Satisfaction Survey
- ★ Client Exit Interview Instructions
- ★ Script: Client Exit Interview
- ★ Letter: Follow-Up to Client Exit Interview

External Partner Feedback and Assessments
- ★ External Partner Assessment Campaign Instructions
- ★ Script: External Partner Assessment Meeting

Team Feedback and Assessments
- ★ Service Model Assessment Meeting Instructions
- ★ Service Model Assessment Meeting Discussion Items
- ★ Sample: Team Assessment Discovery Sheet