

THE CLIENT EXPERIENCE SNAPSHOT

Strengthen Client Loyalty Through
Meaningful Moments

"Retention begins with reflection. Before you improve the experience, you must first understand it." ~ Yvonne A. Jones



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How to Use This Snapshot

This is a simple reflection tool to help you assess what your clients experience at key points in their journey with you.

- ✓ You can print and fill in by hand
- ✓ Or use it digitally as a journaling worksheet
- ✓ Revisit it every 3–6 months to see your growth

[illegible]

Snapshot Map

Client Touchpoint	What They Currently Experience	How It Makes Them Feel	One Way I Could Improve It
Discovery (first contact)			
Welcome/Onboarding			
Communication (email/calls)			
Delivery of Service/Product			
Follow-up and Support			
Long-Term Relationship			

Small Shifts, Big Impact

Pick *just one area* from the chart where you could improve the client experience this week.

- What's one action I can take right now?
- What tools/support do I need?
- When will I complete this?
- Who can I ask for feedback?

Before You Go...

Remember, building a great client experience isn't about perfection. It's about consistency, care, and showing up with intention.

"People may forget what you said, but they will never forget how you made them feel." ~ Maya Angelou

✉ I'd love to hear what you discover as you use this tool.

Tag me or send a message and let's celebrate your next client retention win together.

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