CLIENT ROADMAP

1

Pre-Discovery: Receive client onboarding email, establish client portal for secure file sharing, gather initial data, schedule Discovery meeting.

2

Discovery Meeting: Perform needs analysis, establish objectives and goals, document commitments to each other.

3

Post-Discovery: Sign written engagement agreement, pay any relevant deposit, review welcome package.

4

Pre-Delivery: Client completes specific requests and document checklists. Accept invitation to Delivery meeting 1-2 weeks after receipt.

5

Delivery Meeting: Review data analysis and presentation of service, product, or plan. Schedule 3-month follow-up after implementation.

6

Three-Month Follow-Up: Review implementation, confirm goals and objectives, and perform additional needs analysis.

7

Ongoing: Periodic check-ins according to service level, end-of-year planning, and annual review.

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