



LET'S TALK ABOUT  
CREATING YOUR

# CLIENT JOURNEY

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CRAFTED FOR YOU  
BY GFITTSASSIST

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## SECTION I

# Write your current client journey

## What is a client journey?

As best defined by bynder.com, A customer journey refers to the path of interactions an individual has with your brand, product and/or services. It can be interpreted as a map of unique interactions that any given customer has with your brand and marketing touchpoints.

Business owners should guide customers to take a customer journey that they think will lead to the best outcome/service for both the brand and customer. Every stage of your customer journey should further familiarize your brand with a customer and leave a lasting impression.

Understanding the customer journey is hugely valuable for brands. It gives you an in-depth understanding of both potential and engaged customers, enabling you to deliver targeted communications.

Customer journey mapping is a common strategy used to better understand the customer journey, providing a visual representation of the total sum of experiences any given customer has with a brand.

## How do you write your client journey?

To begin defining your client journey, you must first understand your current journey. Whether set intentionally or not, you already have a client journey.

Take a moment to write down the current journey. Questions to consider:

- How do potential clients contact you? Your website? Social media? Text message referrals?
- When they contact you, how do you respond? Via email? Phone? Text?
- How do you communicate your services with the client? Do you have a discovery call? Do you send a pricing guide?
- Once they are ready to book, do you have a contract? How do you prepare it? How do they complete it? How do they pay? Is there a set payment plan?
- How do they know they have completed the booking? Do they receive a confirmation email?
- What happens after they book? What are the next steps? Are those steps clearly communicated?

## SECTION II

# Write your ideal client journey

**Now what?**

After writing your current client journey, it's easier to see where you may have some areas that could use improvements. Now, consider businesses that you've worked with where you enjoyed the experience. What did they have that you don't?

**How do you write your ideal client journey?**

Don't worry about the platforms in which these tasks will be completed, just simply focus on your ideal client journey. Questions to consider:

How do you WANT clients to contact you?

How do you WANT to establish initial communications? Email? Phone?

After you initially connect, what follow-up information for you WANT to share?

What do you DESIRE for your booking process? Do you WANT clients to receive a proposal to select services? Should they sign a contract and pay before receiving booking confirmation?

What payment structure do you WANT clients to follow?



## SECTION III

# Fill in the gaps

**Compare**

- Now, look at your current journey and your ideal journey. What steps already exist in your journey that you like and want to keep?
- What items in your ideal journey are missing from your current journey?
- Do items in your journey need to be reordered?
- Are you missing pieces within the journey?

**Combine**

On a fresh sheet of paper, take some time now to combine the positive points in your current journey with the steps in your ideal journey that you'd like to include.

## SECTION IV

# Highlight and create all content

**Create**

Now, you have your roadmap. You've clearly defined the ideal client journey you'd like to incorporate into your business. Great!

Take a step back and look at the content needed within your journey. What emails do you need to write? What forms and resources do you need to send? What are the included items and prices for each package/service that you offer?

Highlight all content items within your journey. Identify what content items you already have and what items need to be refreshed or created. [Now is the time to start creating!](#)

## SECTION V

# Set up your workflow automation



## Automate

You have your roadmap, and you have all content needed for your journey. Now, it's time to turn your plans into automated reality.

## How to get started

With your written journey in hand, and your content created. Go into Dubsado and begin crafting your workflows.

As you begin setting up, you may find that some items need to be adjusted or reordered. That's ok! Be open to change!

As you set up your workflow, be sure to test, test, and test again!

1. Create a test project
2. Open two browsers. One browser as the business owner, the other browser as the client
3. From your client browser, start with your lead capture form and complete the steps as the client would.
4. Hop back and forth from business owner to client as you run through the flow from start to finish
5. Take note of any areas that need to be adjusted. Make the changes and test again until you are happy with the flow.



## CONCLUSION

# This is the beginning of something good.

You did it! You've clearly defined your client journey and provided yourself and your clients with a clear roadmap for working with your business.

Now take this guide, and duplicate this process repeatedly for other services and workflows you may want to create.

Remember, Dubsado is not a set-it-and-forget-it system. There will be part of your client journey that must remain manual tasks. There will be times when clients go off script. There may be times when you have to make changes to your automation. Your system should change and grow along with you.

You got this!

*- Gianni*

