

PORTALS AND OPERATIONS

The Client Experience Systems Audit

Identify where the client experience is leaking time, trust, money, or follow-through.

For service businesses managing leads, forms, payments, files, notes, and client updates by hand.

LEAD CAPTURE

- Where do new requests enter?
- What information is collected too late?
- What does the client need to know immediately after inquiry?

WORKFLOW

- Which task is repeated so often that it should stop depending on memory?
- Where do notes, statuses, files, and next steps live?
- What should trigger automatically?

VISIBILITY

- Where does the client ask, 'what happens next?'
- What should staff see that clients should not?
- What should clients be able to check themselves?

PRIORITY

- Which workflow costs the most owner time?
- Which missing system creates the most risk?
- What is the smallest portal or dashboard that would create relief?