Every client and every encounter is unique

Transactions > Experiences

What's going on around their tree?

Remember, the leaves on the tree represent our individual service interactions with our clients and the tree represents the totality of their experience with our firm. But...the client the client's life isn't only the tree we create with them. It includes everything going on around their tree. This exercise encourages you to think about what is going on around your client's tree and how that may influence their view of the tree or present opportunities for use to deliver unreasonable hospitality.

What is your client

celebrating right now?

How do current events impact their organization?

How does their organization differ from 12 months ago?

How is AI changing their market?

about their organization, industry, or competitors?

What's been in the news recently

How has your client's position in the market changed recently? Are their new competitors?

What is happening in their community?

Have they had staff turnover?

How is their favorite sports team doing?

Where is your client at in their career path? 2 years from retirement or 6 years out of college?

How is their organization performing today?

In general, are the skies clear and blue or dark and gloomy around their tree? What is the best thing that has happened for your client

personally or professionally in the past 6 months?

What is your client's favorite hobby – is it the correct season right now? Does your client or their family have health issues?

What stage of parenting is your client in – what unique challenges does that present?

How does your client's year vary in terms of busyness? Where does your current interaction land on that spectrum?

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We spend the majority of our time thinking about the things WE do as a firm...our situation...when WE need things done...how OUR schedule is looking...how our process works. We often think about these things in terms of client service. All of this, while important, are below the ground, invisible to our clients or at the very least assumed to exist.