



CLIENT EXPERIENCE TEAM

"How can we delight our clients?"



Role

The role of the Client Experience Team is to build long-term client relationships by creating high-impact, meaningful experiences.

Responsibilities

- Create processes to help the Tax and Accounting divisions engage in cross-referrals.
- Establish a set of standards for staff and client interactions.
- Develop client cultivation strategies.
- Design meaningful touch points to delight clients and celebrate milestones.
- Create client service guidelines and training program for staff team.
- Design "delightful" client experience when onsite (aesthetics, tone, welcome, etc.).

Members

ALLI*D MARIE
AVID MICHELLE

Executive Coach

TIM

**Team Coordinator*