

Creating a New, Optimized Client Intake Process

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SIGNATURE**FD**

Meet SignatureFD

SignatureFD is a financial firm that offers meaningful investment plans to help their clients improve their Net Worthwhile.™ Within SignatureFD, the SignatureGENEROSITY team is responsible for creating “SignatureGENEROSITY Game Plans” for their clients, guiding them in their journey of giving.

Typically, their clients express an interest in giving for various reasons (to create a more fulfilling life, limit taxes, or leave a legacy). Then, the SignatureGENEROSITY team creates an action plan based on

their client’s background, interests, and desires. The problem? This process was cumbersome, time-intensive, and difficult for both the team and their clients.

That’s where the Leverage Team comes in...

Leverage





SignatureFD's Goals

SignatureFD wanted Leverage to help improve their process for creating client action plans. When they came to us, their process was lengthy, boring, and tedious for them and their clients.

Here's how the previous system worked:

- A client would express interest in giving to a cause.
- SignatureGENEROSITY would send them an intake form through SurveyMonkey to learn more about them.
- They would have a long meeting where the client is taken through a 12-page PDF explaining the process.
- They would play a card game to learn about the client's values.
- The team would help them come up with an action plan for who they are going to donate to, why, and how.
- At the end, they would send a feedback form through SurveyMonkey.

Our Plan

The Leverage team proposed to start from scratch, recreating this process from the ground up. We proposed the following:

Step 1: Revamp the SignatureGENEROSITY webpage where clients would first learn about the program and express interest.

Step 2: Replace the card game with a fun and engaging quiz to learn what causes the client holds close to their heart.

Step 3: Revamp the intake and feedback forms using Typeform.

Step 4: Replace the 12 page PDF with three 1-page templates using Mural: A Generosity Action Plan, a Generosity Blueprint, and a Generosity Statement.

Step 5: Integrate Mural into the process as a brainstorming tool so they could hold effective virtual meetings.

Step 6: Develop a SignatureGENEROSITY Playbook to use as a marketing tool, which outlines the process and what prospects can expect to gain from working with SignatureGENEROSITY.

The Results

We were able to help SignatureGENEROSITY create a brand new process that took less time to complete, was easier to use, and more interesting for both the clients and their team.

- They were able to replace their lengthy 12 page PDF (which took a long time to review in meetings) with three custom deliverables that their clients can walk away with.
- Instead of a lengthy card game during their meeting, they now have clients fill out two quizzes (a “Values Quiz” and a “Generosity Alignment Quiz”) before the meeting so everyone is up to speed.
- Their revamped intake and feedback forms are easier to use, nicer looking, and more professional.
- They now have a well-designed playbook that clearly explains everything a prospect needs to know about working with SignatureGENEROSITY.

This new process has cut down the amount of time they spend meeting with clients, allowing them to bring more clients through the process while their team spends their time on other, more important projects within their business.



Eddie G.

Leverage, Project Manager

Eddie managed and coordinated this project. His skill sets include project management, automation, process optimization, and more.



Hannah C.

Leverage, UI/UX Designer

Hannah designed the user interface for the two quizzes. Her skill sets include graphic design, identity/branding, and UX/UI design.



Alexandra Z.

Leverage, Graphic Designer

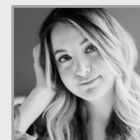
Alexandra created the client intake webpage. Her skill sets include graphic design, social media, web development, video editing, identity/branding and more.



Slava I.

Leverage, Website Developer

Slava assisted with implementation, bug fixes, and maintenance. His skill sets include website development in Wordpress and Shopify.



Kelli U.

Leverage, Graphic Designer

Kelli designed the SignatureGENEROSITY Playbook. Her skill sets include graphic design, identity/branding, video editing, illustration, animation, and more.