

CLIENT 
EXPERIENCE
INSTITUTE

PROACTIVE
ADVISORY
CLIENT
TEAM



HUMAN₂**HUMAN**

Where Smart People Come to Learn.

Advisor Name	Client Name
<input type="text"/>	<input type="text"/>

Advisor Role	Advisor Email
<input type="text"/>	<input type="text"/>

Advisor Phone 1	Advisor Phone 2
<input type="text"/>	<input type="text"/>

Advisor's Company	Company Website Address
<input type="text"/>	<input type="text"/>

Client Tenure (Length of Relationship)	Relationship Capital Stage with Client
<input type="text"/>	<input type="text"/>

Areas of Specialty	Scope of Service
<input type="text"/>	<input type="text"/>

Advisor's Board and Nonprofit Memberships

Insights

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Advisor's Board and Nonprofit Memberships

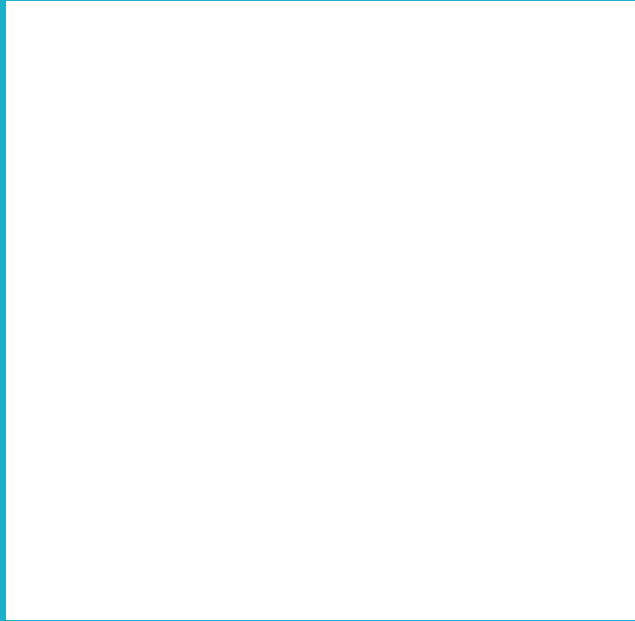
Insights

COLLABORATION ZONES

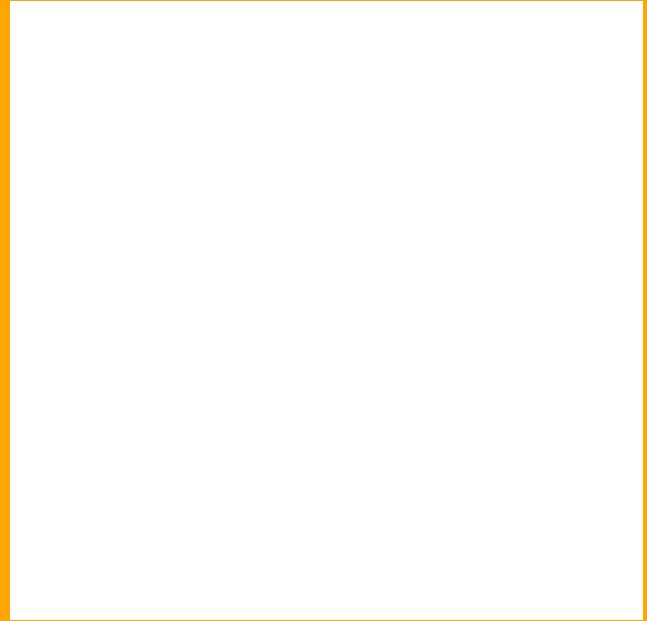


Collectively identifying ways to offer insights that impact the client.

BUSINESS INSIGHTS
Strategic initiatives



ENTERPRISE INSIGHTS
Organization-wide



TRANSACTIONAL INSIGHTS
Day-to-day activities



FUNCTIONAL INSIGHTS
Ops, HR, finance, legal, etc.



VALUE CREATORS



REVENUE ENHANCEMENT

Contributes to revenue growth



BUSINESS PROCESS IMPROVEMENT

Enhances efficiency and operations



COST OPTIMIZATION

Reduction, removal or avoidance of expenses



RISK AVOIDANCE

Reduction, removal or avoidance of risk



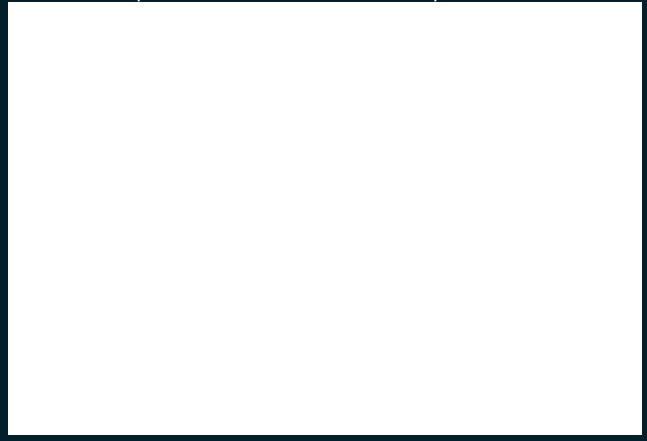
PROFITABILITY ENHANCEMENT

Contributes to expanding profits



EASE OF DOING BUSINESS

Improves overall client experience



CLIENT STATE OF READINESS



NOTES

JOIN THE MOVEMENT

**CLIENT
EXPERIENCE**
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Client Experience Institute™ is an advisory firm specializing in serving organizations who are all about delivering more value, more knowledge, and more results to their respective stakeholders. We work with like-minded professionals who are willing to think differently about how value is created, delivered and sustained.

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