

Case Study: Optimizing Client Journey Tracking and Program Management at Baxter Clewis

Background:

At XYZ Company, as a Success Advisor, I was responsible for overseeing client communication, onboarding, and follow-ups to ensure client progress through our programs. Initially, the company utilized the Kartra platform for learning programs, which was later transitioned to Tovuti. However, the absence of a structured client progress tracking method hindered our ability to effectively support clients and assess their journey through the program.

Challenge:

The main challenge was the lack of a system to track client progress and identify pain points that led to decreased client retention and program completion rates. With a roster of 90 clients and no existing mechanism for monitoring their advancement, we faced difficulties in understanding where clients were struggling and why some were disengaging or "ghosting" their Success Advisors.

Solution Implemented:

1. **Development of a Tracking Spreadsheet:** I created a comprehensive Excel spreadsheet to monitor client progress. This spreadsheet included:
 - Client names
 - Email addresses
 - Start and end dates of the program
 - Segmentation of the program into stages: Foundations, Sophomore, Junior, and Senior
 - Quiz completion status for each stage
2. This structured approach allowed me to track clients' advancement through the program and identify where they faced difficulties.
3. **Identification of Key Pain Points:** By analyzing the data from the tracking spreadsheet, I was able to pinpoint the stages where clients were most likely to get stuck and subsequently drop out. This insight helped in understanding the critical areas requiring intervention and support.
4. **Program Optimization:**
 - **Client Segmentation:** It was determined that clients who completed the main program would transition to an intern program. By recognizing that we no longer needed to manage these clients directly, I proposed creating a new Intern department. This adjustment freed up space in the Success Advisor roster for new clients, optimizing client management and allowing for increased company revenue.

Outcomes:

1. Improved Client Tracking System: The tracking spreadsheet demonstrated its value to my supervisor, leading to the introduction of a new CRM system, Monday.com. This new system streamlined client management and improved our ability to track and support clients efficiently.
2. Creation of an Intern Department: My initiative led to the establishment of a dedicated Intern department. This change not only provided more space for new clients but also enhanced program efficiency and contributed to overall company growth.

Conclusion:

The implementation of the tracking spreadsheet and subsequent program adjustments significantly improved client management and retention at XYZ Company. By identifying and addressing pain points in the client journey, I was able to support and recommend optimization of our program structure and supported company expansion through strategic changes in client allocation and resource management.