

Client Experience Workshop – “Creating Meaningful Client Experiences with ABCs + Me/We/Thee”

Key Definitions:

ABCs of Meaning

- **Agency:** Autonomy, freedom, creativity, mastery; the belief that you can impact the world around you.
- **Belonging:** Relationships, community, friends, family; the people that surround and nurture you.
- **Cause:** A calling, a mission, a direction, a purpose; a transcendent commitment beyond yourself that makes your life worthwhile.

Me / We / Thee Stories

- **Our ‘Me’ Story:** The one where we’re the hero, the doer, the creator; we exercise agency and, in return, feel fulfilled.
- **Our ‘We’ Story:** The one in which we’re part of a community, a family, a team; we belong to a group and, in turn, feel needed.
- **Our ‘Thee’ Story:** The one in which we’re serving others; we give of ourselves to others and by extension, feel part of something larger.

Workshop Flow (60–75 minutes)

1. **Individual Reflection** – 10 min
2. **Self-Assessment** – 10 min
3. **Process Redesign** – 20 min
4. **Client Experience Promise** – 10–15 min

Page 1: Individual Reflection & Self-Assessment — Reflect on Your Top Clients

Agency (Me Story): Where do we enable clients feel like the hero/creator in their financial lives?

Belonging (We Story): How do clients experience us as true partners who have their back?

Cause (Thee Story): How do clients see their plan serving something larger (family legacy, community, values)?

Quick Self-Assessment (Score 1–10) Current processes deliver...

Agency: /10

Belonging: /10

Cause: /10

Page 2: Process Redesign — For each client journey stage, capture 2–3 specific language or process changes.

Approach & Fact-Finder

Agency (Me):

Belonging (We):

Cause (Thee):

Planning Conversation (PX)

Agency (Me):

Belonging (We):

Cause (Thee):

Ongoing Reviews & Service

Agency (Me):

Belonging (We):

Cause (Thee):