

coordinate  
guidance  
compliance  
updates  
TRAINING

PROTECT LEADER



# Client Profiles

OBJECTIVES  
TRAIN MANAGER  
EVALUATE TRAINER  
PROCESS TESTING



gaps

CP PURPOSE  
CLIENT PREFERENCE(S)  
SERVICE PERSONALIZATION  
BUSINESS CONTINUITY  
FASTER DELIVERY  
NEEDS ASSESSMENT

key sections  
library INTRAO  
GENERAL INFO  
UPDATES?

lack of clarity  
who DOES IT?

PROCESS/TEMPLATES  
#1 NEEDS ASSESSMENT

key sections #2 SERVICE REQUEST  
updates?  
keywords

SEARCH STRINGS  
lack of clarity  
WHO DOES IT?  
KEEP ADDING  
REPLACE?

GUIDE  
UPDATES TEAM

COMMUNICATION TRAINING

CLIENTS  
REGULAR  
FOLLOW UP  
SERVICE SET UP

PROCESS  
1-2-3  
CLIENT MEETING

FILL  
SAVE  
TEMPLATES  
CATEGORISE

BEST PRACTICES  
TIME  
LISTENING  
DOCUMENTING

ACTION ITEMS

gap