



# **DNA BEHAVIOR**

## **CLIENT ENGAGEMENT MEASUREMENT**

## 1. Introduction

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This document is intended to provide a process for measuring levels of client emotional engagement.

The measurement inputs may need to be reviewed on a case to case basis.

Further the measurement inputs can be input and/or automatically recorded into the CRM system.

Client engagement is a continuous process:

1. Define the ideal client for the business and then match to each sales/relationship manager based on reviewing values, DNA behaviors and interests of existing clients and your team.
2. Create a customized marketing campaign to attract right prospects that fit the ideal client profile.
3. Have existing and prospective clients take the DNA Natural Behavior Discovery.
4. Conduct a discovery interview during your first appointment using specific “Powerful Questions” aligned to the DNA Natural Behavior Discovery results.
5. Discover why client decided to pursue his or her professional, and the specific needs that need to be met.
6. Keep clients engaged by offering creative information and solutions on a customized basis to keep the client involved and interested.

## 2. Assessment of Ideal Client Fit

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### Ideal Client Fit Indicators

1. Shared values and beliefs (Multiply by 5)
2. DNA Behavioral match to relationship manager (Multiply by 3)
3. Mutual interests (Multiply by 2)
4. Ease of communication (Multiply by 4)
5. Self awareness, clarity and confidence to participate in the service (Multiply by 2)
6. Services required by client match what company delivers (Multiply by 4)
7. Clients expectation of a successful relationship match the company’s (Multiply by 5)
8. Follows company processes and procedures (Multiply by 3)
9. Completes information requests on a timely basis (Multiply by 3)
10. Delegates responsibility to the company (Multiply by 3)
11. Prepared to openly share information (Multiply by 4)
12. Treats company team with respect (Multiply by 4)
13. Client prepared to pay fair value for services delivered (Multiply by 4)
14. Feeling of strong personal connection (Multiply by 5)
15. Minimal feelings of stress to deliver services (Multiply by 5)

## **Ideal Client Measurement:**

Measurement of client fit upfront and annually by client service team.

Assign points for each ideal client indicator:

- 1= Strongly disagree
- 2= Disagree
- 3= Slightly disagree
- 4= Average fit
- 5= Slightly agree
- 6= Agree
- 7= Strongly agree

## **3. Assessment of Client's Emotional Engagement**

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### **Emotional Engagement Indicators**

We measure the success of our approach through the strength (range of 1 to 5) and recent occurrence of the following types of client engagement indicators:

1. Purchase of a product or service in the past 6 months (multiply by 3)
2. Use of the product or service in the past 3 months (multiply by 4)
3. Earned referral in the past 6 months (multiply by 5)
4. Attended recent company events: webinar, seminar, teleseminar, breakfast, luncheon, client appreciation, networking etc (multiply by 1)
5. Responds to company communications: email, telephone call, surveys etc (multiply by 1)
6. Given a testimonial in the past 6 months (multiply by 3)
7. Regularly speak passionately about the company (multiply by 2)
8. Connected on social media network in the past 6 months and actively shared your company content (multiply by 3)
9. Participated passionately in company new media efforts: video, podcast, blog etc in the past 6 months (multiply by 2)
10. Participated passionately in company marketing and communication campaign programs in the past 6 months (multiply by 2)
11. Completed a first client service appointment (multiply by 2)
12. Completed a second or third client service appointment (Multiply by 3)

## DNA Behavior – Client Engagement Process

13. Completed a client service appointment and awarded a company evaluation of above 5 out of 7 (multiply by 2)
14. Feel their needs are understood, accepted and respected (Multiply by 3)
15. Feels their concerns are resolved (Multiply by 2)
16. Believes they are receiving a unique service experience for them which is value for money (Multiply by 4)
17. Demonstrates patience and respect to your client service team (Multiply by 3)
18. Demonstrates trust in your business and the client service team (Multiply by 5)

### **Client Engagement Evaluation Measurement:**

Measure client engagement at regular intervals – 2 times a year.

Assign points for each engagement indicator:

- 1= Strongly disagree
- 2= Disagree
- 3= Slightly disagree
- 4= Average fit
- 5= Slightly agree
- 6= Agree
- 7= Strongly agree