

# Client journey **leak** rapid scorecard

Enquiry → First Interaction → Proposal / Checkout →  
Onboard → Service → Renew → Reviews & Referrers

7

Questions to see how far behind (or ahead of) AI-powered, omnichannel competitors you are.



Built for advice-led financial services firms



Score each from 1 to 5 using the same scale.



Get a fast, honest view of how “smart” your journeys really are and where you’re likely leaking the most revenue.



## Scoring scale (use for every question):

1. Not true at all We don't really do this, or only in edge cases.
2. Mostly manual / inconsistent Depends on people, spreadsheets, or ad-hoc emails. No real visibility or control.
3. Basic and reliable It usually happens, but it's manual or single-channel. Limited view of the full client.
4. Structured and semi-automated clear process, some automation and channel choice, basic reporting on what's happening.
5. Smart, AI-assisted and omnichannel Well-designed journey, largely automated, right channel and timing per client, driven off a single client view with minimal staff effort.

### Q1 – Enquiry → First Interaction/Meeting

New enquiries from all main sources (web, phone, email, referrals) are captured in one system, routed to the right owner, and followed up quickly using smart automation (email/SMS/tasks) so no good lead gets missed.

Score (1–5): \_\_\_\_

### Q2 – First Interaction → Proposal / Checkout Started

After a first interaction (meeting, call, digital interaction), our journeys systematically move serious prospects into a clear next step (proposal or online checkout) using templated flows, automated prompts, and smart reminders – not just relying on someone to remember.

Score (1–5): \_\_\_\_

### Q3 – Proposal / Checkout → Decision (Yes/No / Purchase)

Once a proposal is sent or checkout started, we use structured, automated follow-up (email/SMS/calls) and simple AI-driven prompts so most outcomes are decided quickly, with very few opportunities left in “maybe” limbo.

Score (1–5): \_\_\_\_

### Q4 – Onboard → First 90 Days

New clients go through a clear, mostly automated onboarding journey with staged communications (email/SMS/portal), smart check-ins, and a single view of their status so they feel guided and we can see exactly where anyone is stuck.

Score (1–5): \_\_\_\_

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3. Basic and reliable It usually happens, but it's manual or single-channel. Limited view of the full client.
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### Q5 – Service & Support Journeys

Client service requests are captured in one place, prioritised, and routed to the right person or team; clients can use multiple channels (phone, email, portal, chat), and we use automation/AI where appropriate to resolve routine issues fast while giving the team full context.

Score (1-5): \_\_\_\_

### Q6 – Renewals & Upsell

We have a structured, data-driven renewal and upsell engine that uses profitability, risk, and potential to prioritise effort; profitable and high-potential customers get smart, omnichannel renewal/upsell journeys, while low-value clients are handled with light-touch or self-serve so we don't waste time.

Score (1-5): \_\_\_\_

### Q7 – Reviews, Relationships & Referrers

We deliberately manage ongoing relationships with key clients and referrers using scheduled touchpoints, simple automation, and AI-assisted prompts to spot who needs attention, who is at risk, and who is likely to refer – and we track the impact.

Score (1-5): \_\_\_\_

## Totals

Total Quick Score (add Q1-Q7): \_\_\_\_ / 35



# What your total score means

Use this as a fast temperature check. The full online scorecard will give you stage-by-stage detail.

## 28–35 Smart, competitive journeys

You're running relatively modern, leveraged journeys. You're probably ahead of many peers. Your risk isn't "we're broken," it's **small blind spots**: specific stages where you're still over-reliant on people or single-channel comms.

If this feels right but you're still not seeing the commercial impact you expect, you likely have **1–2 hidden leaks**.

## 21–27 Solid foundations, weak leverage

You're doing most of the right things, but a lot of it is **manual, siloed, and harder than it should be**. You're vulnerable to competitors who are running smarter, AI-assisted journeys on lower cost.

You're not in crisis, but you're leaving margin and capacity on the table. Fixing **just one or two stages**.

## 14–20 Heavy, human-powered journeys

The basics are there, but they rely on **heroic staff effort**: chasing, remembering, updating spreadsheets, digging through inboxes. Clients experience inconsistency; leadership sees patchy reporting.

This is where good firms stall: you grow, then the wheels start to wobble. You're at real risk of being **out-competed by leaner, more automated rivals**.

## 7–13 Legacy journeys in an AI world

You're getting by on relationships, reputation, and manual work. Almost every stage is a potential leak. You're overpaying in human effort for results that smarter competitors are getting with less.

If your P&L feels squeezed and your team feels stretched, **your journeys are a big reason why**.

# Where to look first?

- 1 Look at your lowest scoring questions, then:
- 2 Ask: “If this was a 4 or 5, how much extra revenue or capacity would we unlock?”
- 3 Circle 1–2 stages you know are holding you back.

Those become your priority leaks.

## Get your in-depth client journey leak score

This quick score shows directionally where you stand. If you stop at the quick score, you'll know there's a problem but not where the money is leaking fastest.

To see exactly where you're leaking revenue by stage and how far behind AI-enabled competitors you are:

Visit [www.unfry.ai/scorecard](http://www.unfry.ai/scorecard)

You'll get:

- A 5–7 minute online scorecard
- Stage by stage scores for all 7 journeys
- A simple view of your top 2–3 revenue leaks

