

## **EXAMPLE OF CUSTOMER JOURNEY MAP**



solution





































Checklist & Free Review) to obtain suggested scope & fixed pricing

Adviser / Customer Meeting

Minimal Data Input via Online Interview

Adviser / Customer / View Legal -Online Planning Meeting

View Legal Produces All Documents **Draft Documents** Emailed

Adviser / Customer / View Legal - Online Document Review Meeting

Final Documents Posted for Signing

Signed **Documents** Sent to View Legal for Secure Storage

Regular Estate Planning Health Check































One meeting solution

Preflight (Robust Checklist & Free Review) to obtain suggested scope & fixed pricing

Adviser / Customer Meeting

Accurate and Complete Data Input via Online Interview

View Legal Produces All Documents **Draft Documents** Emailed

Adviser / Customer / View Legal - Online Document Review Meeting

Final Documents Posted for Signing

Signed Documents Sent to View Legal for Secure Storage

Regular Estate Planning Health Check