



GROWTH AND PLANNING

Client journey map worksheet

A journey-mapping worksheet for seeing every stage of the client experience, the questions clients ask, ownership, friction, and moments that build trust.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

You want to improve the whole relationship, not only one isolated workflow.

WORK THROUGH THE CHECKLIST

- ☐ 01 **Map the client stages**

- ☐ 02 **List client goals**

- ☐ 03 **Capture questions and emotions**

- ☐ 04 **Name the internal owner**

- ☐ 05 **Spot friction**

- ☐ 06 **Choose one improvement**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.

This practical workflow resource is not legal, financial, tax, or security advice. Adapt it to your team and circumstances.