

Client Service Model Sample

To get you thinking about the different types of service activities you can offer, refer to the sample below which is found on Tab 1 of the Excel resource.

We have identified four core service activities and several other types of value-add services.

Client Service Model Sample

Core Service Activities					Time of Year & Other Value Add Services					
Client Class	Review Meeting	Service Call	Call Rotation	Moment of Truth	Thanks Giving Cards	Birthday Cards	Annual Anchor	Special Events	Articles of Interest	Total Contact
AAA	Semi-Annual	Annual	Quarterly	Annual	Annual	Annual	Annual	Semi-Annual	Semi-Annual	15
	FA	Assistant	FA		Assistant	Assistant	FA		FA	
AA	Semi-Annual	Annual	Quarterly	Annual	Annual	Annual	Annual	Annual	Annual	13
	FA	Assistant	FA		Assistant	Assistant	FA		FA	
A	Annual	Annual	Semi-Annual	As Needed	Annual	Annual		Annual		7
	FA	Assistant	FA		Assistant	Assistant				
AF	Annual	Annual	Annual	As Needed	Annual	Annual		Annual		6
	FA	Assistant	FA		Assistant	Assistant				
B	Annual	Annual			Annual					3
	FA	Assistant			Assistant					
C	Annual *	Annual								3
	FA	Assistant								
D	Annual *	Annual								2
	FA	Assistant								