





Welcome

This is a roadmap to guide you through ten strategic steps to create a premium client journey that not only grows your revenue but helps you build a business and life you love. You'll gain clarity on your goals, attract high-value clients, and apply proven strategies like McKinsey's 3 Horizons Model to scale with confidence. These steps are designed to help you transform your business, elevate your impact, and achieve next-level success, on your terms.

Ready to take your business to the next level?

Let's dive in!

Psst - I have a very special invitation to those that make it to Step 10!

Introduction

Hello! I'm Fleur Allen - lovely to meet you

When people hear my business name, they often ask, 'What do we ask Fleur?'—and I love it! As a business educator, I'm all **about building long-term, trusted, and meaningful business relationships.** That simple question is often the start of something great. I'm so glad you're here, ready to take your business to the next level.

Why You Are Here

You're here because you're an expert in what you do, and you know that the right support will fast-track your success. You're ready to level up, and I'm here to help you make it happen. Let's dive in and get started!

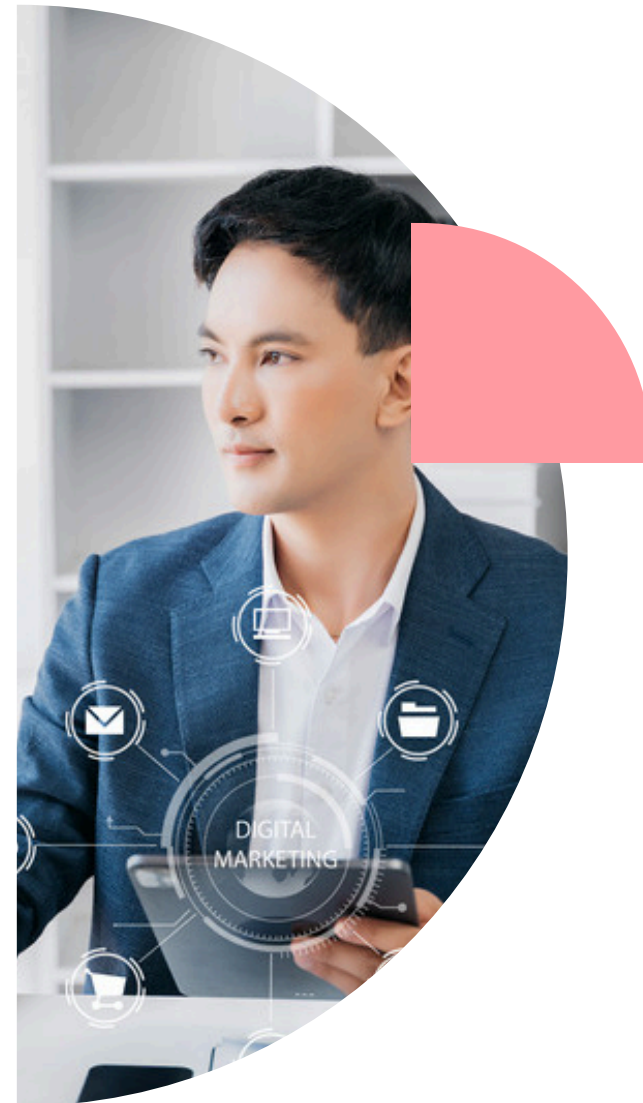


What Our Clients Say

Gary Sargisson
Snap Printing

Working with Fleur as a one-to-one coaching client has significantly enhanced our business operations, specifically in refining our sales and follow-up processes and developing strategies to attract more premium-level clients to our local print business. Her guidance has directly contributed to measurable improvements in our sales outcomes and business growth.

Thank you Fleur



Step 1 Take 100% Responsibility

It Starts with You

Event + Response = Outcome

As an accredited Success Principles Coach, I draw on Jack Canfield's proven Success Principles as the foundation for helping you reach your next level of success in business. It all starts with taking full responsibility, understanding that how you respond to any business situation directly impacts your results.

By adopting a mindset of ownership over every decision and action, you'll approach each client interaction with greater dedication and purpose. Not sure where to start?

Try Acting As If you have 100% responsibility for every outcome—it's a powerful shift that puts you in control of your success.

Step 1 Take 100% Responsibility

Event + Response = Outcome

Action Step:

Take a moment to reflect on how you currently respond to client inquiries and engagements. Are there opportunities to communicate more effectively, set clearer expectations, or guide conversations toward better outcomes? Small shifts in your approach can have a big impact on your success. Where could you refine your responses to create even stronger connections and results?

Step 2 Clarify Your Purpose

Why You're Here

Your purpose is the foundation of lasting success in business. When you have a clear direction, your communications become more focused and this builds credibility. By confidently articulating your vision, you make it easier for clients to connect with you, and trust you, over the long term.

For example, My Purpose is:

To use my Creativity to Inspire and Empower others, fostering a Connected Community that cherishes the Present Moment.



Step 2 Clarify Your Purpose

Action Step:

Write down your mission statement and keep it front and centre. Let it guide every interaction and communication with your clients, ensuring consistency, clarity, and a strong connection to your purpose.

Step 3 Decide What You Want

Define Clear, Measureable Goals

Set specific financial and growth goals by deciding the level of revenue you're aiming for and identify the number of premium clients required to achieve this.

Use researchers, Locke and Latham's SMART goal setting approach:

- **Specific**, able to be **Measured**
- **Achievable**
- **Relevant** to what you want to achieve overall and
- there **Time** duration deadline.

This specific structure of SMART goals enables clear performance standards that can be measured with the added benefit that their relevance to the goal setter promotes commitment, and their timeliness creates urgency and clarity (Weintraub et al., 2021).

Step 3 Decide What You Want

Action Step:

Practice creating SMART goals for your business:

For example:

“I am so happy and grateful that I have \$10,000 per month personal income from my new business by 30 June XXXX”

“I am so happy and grateful that I have employed a successful sales manager in my business enabling me to work on the business 2 days a week by 31 March XXXX”

“I am so happy and grateful that I have sold half a million copies of my best-selling business book by 31 December XXXX”



Step 4 Set a Breakthrough Goal

Make it Big and Motivating

A breakthrough goal is a game-changer, it drives significant progress and challenges you to think bigger. It should stretch both you and your team, sparking innovation and bold action.

In short, achieving this one goal creates a ripple effect of positive change across your business—and often your life. It's usually the first goal that comes to mind, the one that feels just out of reach or a little bit 'scary'—and that's exactly why it's worth pursuing

Step 4 Set a Breakthrough Goal

Action Step:

Set a breakthrough goal that will create a major shift in your revenue—like launching a client retention and acquisition program. Make sure it stretches you and your business, pushing you toward growth, while still feeling achievable without overwhelming you. The right goal should excite and challenge you in equal measure!



Step 5 Conduct a SWOT Analysis

Identify Strengths, Weaknesses, Opportunities, and Threats

A thorough SWOT analysis focusing on the breakthrough goal created in step 4 will reveal areas of strength to leverage, as well as weaknesses. These are what you can control within your business and opportunities to harness and threats to address. Usually what is influential outside of your business. For example:

Strengths

Good long term client relationships
Low overheads
Team member of BNI

Opportunities

Network with business owners
Online channels e.g. (FB, IG, LinkedIn) networking & advertising
Partner with other VAs

Weaknesses

Lack of timetable structure
Doubting belief that you can achieve it
Feels like a big responsibility

Threats

Bad review/testimonial
Back ups fail/loss of data
Equipment failure

Step 5 Conduct a SWOT Analysis

Action Step:

Complete a SWOT analysis for your business, focusing on your client journey and how well it aligns with attracting premium clients. A client journey is the ideal steps you would like your best client to take over the long term in your business.

Strengths

Weaknesses

Opportunities

Threats

Congratulations!

You're over half way through the 10 Steps

I'm thrilled you're working through these steps with me. Keep going, the best is still yet to come. I know this works because this is the exact steps I take my one-to-one Success Coaching clients through with outstanding success!

A Reward Just for You

You are an action taker and I love to reward and work with action takers. Remember I have a special invitation waiting for those that get through the 10 Steps.

Let's not delay - keep going!





Step 6 Know Your Premium Client

Refine Your Client Profile

Who is your premium client?

Review your existing and past premium clients.

What are their demographics? Gender, Age, Profession

What are their interests, political views, values?

How do they communicate? Prefer Phone, face-to-face, email or SMS?

Where are they? Networking? Reading newspapers, magazines, Hanging out on LinkedIn, Facebook, YouTube or Instagram?

Identify what is already working in your approach and where improvements can be made to attract and retain high-value clients.

Step 6 Know Your Premium Client

Action Step:

List the top characteristics of your premium clients. Evaluate which elements of your client journey appeal to them and where you could enhance the experience.

Ask yourself:

What do my clients love?

What do I already know needs improvement?

Demographics

Interests

Communication styles

Networks



Step 7 Develop Conversion Documents

Proposals, Letters and Email Templates

Conversion documents are essential for securing high-value clients. Invest time in creating compelling, value-driven proposals and email templates that speak directly to premium clients.

The purpose is to communicate the problem you solve for your premium client and the benefits they receive when they work with you.

Include social proof in the form of current and relevant client testimonials. For example, use testimonials from premium clients when communicating with potential premium clients.

The critical element is to include a clear action step you would the client to take. And to Follow up!

Step 7 Develop Conversion Documents

Action Step:

Draft or update your proposal and email templates to reflect your commitment to a premium client journey, ensuring they communicate value clearly and persuasively.

Problem you solve

Client benefit

Client testimonials

Next Action Step



Step 8 Test and Measure

Get Feedback and Refine Your Premium Client Journey

Test each step of your premium client journey: gathering data and client feedback to refine your approach. Measure key metrics like engagement rates, conversion rates, and client satisfaction.

Step 8 Test and Measure

Action Step:

Implement a system for gathering client feedback at various points in their journey. Use this data to make necessary adjustments to improve their experience.

Engagement rates

Conversion Rates

Client Feedback

Client Satisfaction



Step 9 Take Daily Action

Use the Rule of 5 Strategy

The Rule of 5 is simple: commit to taking five specific actions every day that contribute to your revenue goal. These actions could include follow-ups, outreach, or client check-ins.

This is often where all the best plans and intentions fall down. When there is not consistent action. A disciplined approach is required. The Purpose and Vision you set in Step 2 is the fuel to keep your motivation burning brightly. It is a given that some days will be easier than others. Remaining focused on your end result needs to be top of mind no matter your level of motivation each day.

Step 9 Take Daily Action

Rule of 5

Action Step:

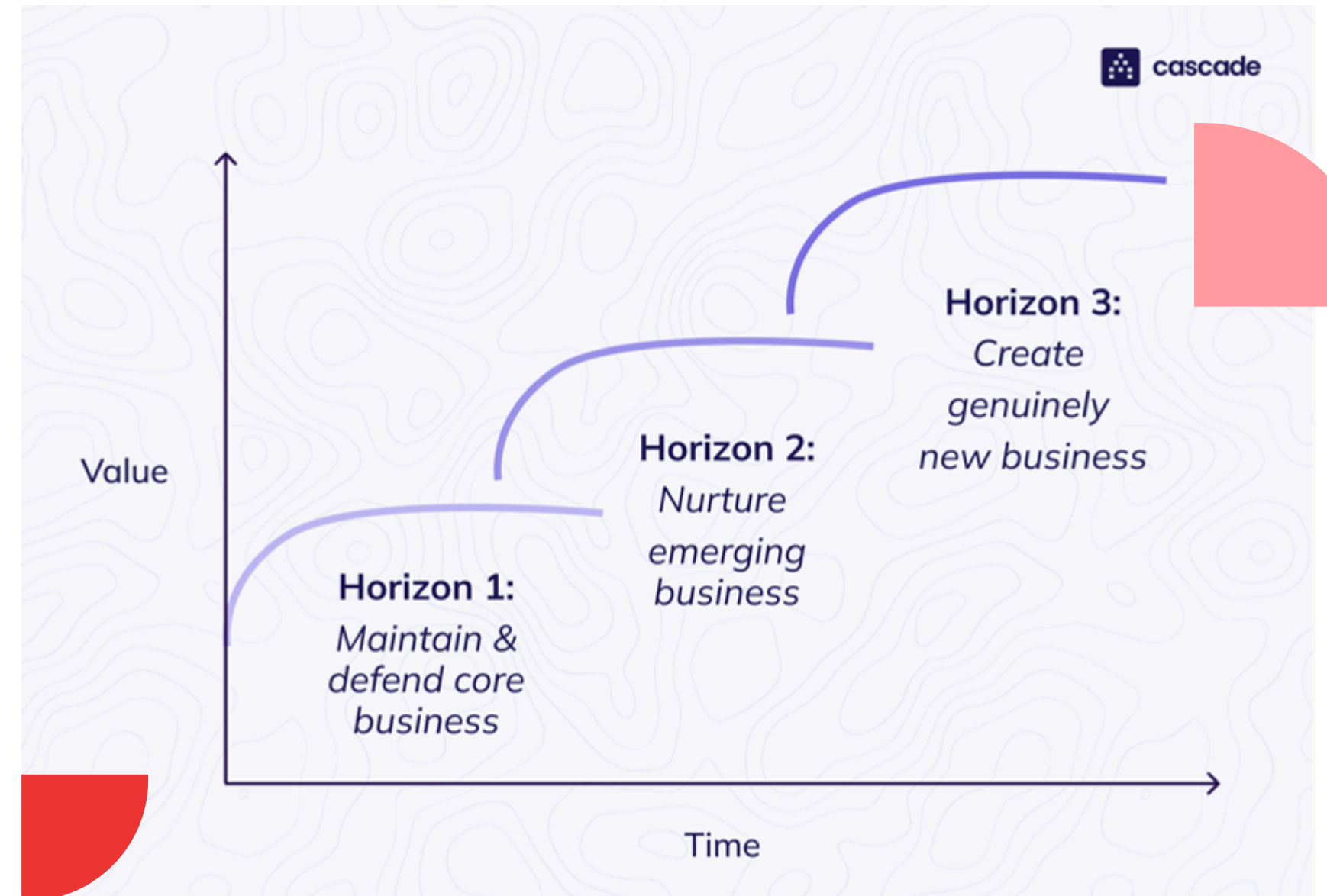
Identify five revenue-driving activities to complete daily. Track these actions to ensure consistency and progress.

Step 10 McKinsey's 3 Horizons Model

Manage Short, Medium and Long-Term Growth

McKinsey's 3 Horizons Model helps businesses balance present needs with future growth. Focus on:

Short-term actions that drive immediate results,
Medium-term initiatives that solidify your position,
and
Long-term projects that ensure sustained success.



Reference: <https://www.cascade.app/blog/mckinseys-three-horizons-of-growth>

Step 10 McKinsey's 3 Horizons Model

Action Step:

Identify one action for each horizon:

Horizon 1: Immediate client actions that drive revenue now.

Horizon 2: Projects that will deliver growth over the next 6-12 months.

Horizon 3: Longer-term innovations that set your business apart.

What Our Clients Say

Veronica Smith Coach

Fleur Allen's coaching has been truly transformative. With her extensive experience across various sectors, she offers a practical, client-focused approach that's rooted in dedication and genuine care. Fleur helped me clarify my goals and create strategies that aligned with my vision. Her unwavering support and belief in me enabled me to secure my dream opportunity, which will profoundly impact my family's future. Fleur's encouragement has empowered me beyond words, and I'm incredibly grateful for her guidance on this journey to success.



What Next?

A very special Invitation just for YOU

Receive 25% off my **Next Level Success** online course.

Why am I offering such a large discount?

By working through this workbook, you have already demonstrated you are serious about your success - you are exactly the type of person I love to work with and I love to reward action.

use Coupon code: 25PERCENT

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Thank You!

Next Level Success Roadmap

