

Client self-service journey

Choose a recurring job and divide responsibility between client, system and experts.

A client journey from request to accepted result

A responsibility and help map

A completed proposed content-service example

A free worksheet from ailevrg.com/guides/client-self-service-portals

Use a recent client job to plan the journey. The completed content example is a proposed service pattern.

01 Client job

Client group and recurring need

Recent example and current route

Useful accepted result

What the client wants to do themselves

02 Context and steps

Approved client information needed

Steps the system can support

Choices the client may make

Expert decisions and approval

03 Help and upkeep

Missing or old information route

Private client access rules

Support owner and service boundary

Who updates approved context

04 Pilot

People invited and job to try

Accepted output and repeat-use measures

Review, onboarding and support effort

Evidence for a paid offer and next decision

A proposed content-brief service

Invented teaching example. No client outcome is claimed.

Job

A former content client prepares a recurring brief using approved business and competitor context.

Roles

The client chooses the objective. The system prepares a brief. An expert checks agreed judgement and claims.

Exception

Old context is flagged and sent to its owner before the affected claim is used.

Test

Observe a completed job, whether the client returns and what support it needs.

Commercial limit

No uptake, payment or revenue outcome is established.

A proposed client-operated content journey

1. Client

Choose the job

State the objective, audience and intended output.

2. System

Load approved context

Retrieve this client's authorised information and flag old or missing records.

3. Client and system

Prepare a brief

Use the shared method while preserving the client's requirements.

4. **Service expert**

Check expert decisions

Review claims or judgement agreed as part of the service.

5. **Client approver**

Accept and record

Accept the result; approved decisions update the context.

This journey is invented. It is not evidence that the proposed product has launched or customers have bought it.