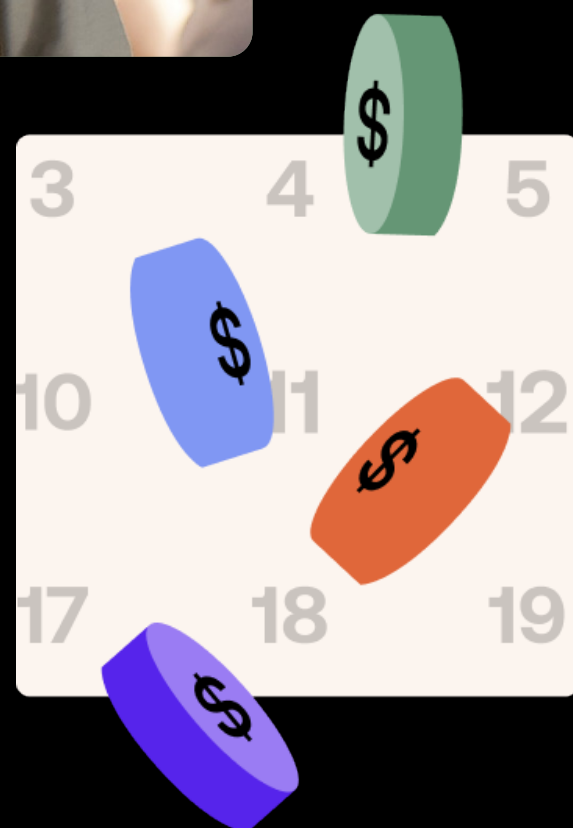


Know your clientflow:

The data behind how top professionals serve their clients



HONEYBOOK



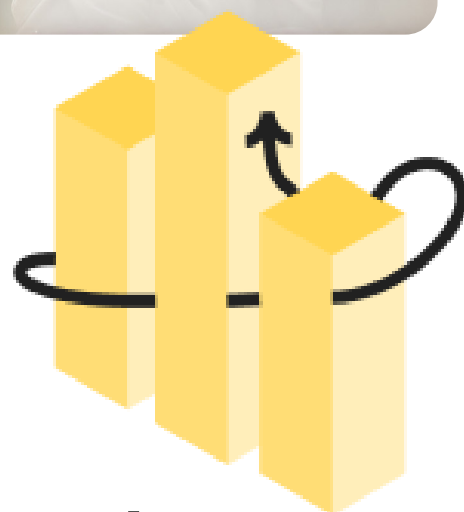
There's a lot that goes into running an independent business. It can be liberating, frustrating, intimidating, and fun. It's hard work, but when you see the joy in your client's eyes, it's worth all the effort. Replicating these moments is the goal of everyone who provides specialized services. The question is: How do we recreate this success every time?

Reaching this moment once takes effort, but repeating your success requires a different kind of strategy. Each point of contact along your client's journey is critical to achieving positive business outcomes. Missteps frustrate clients and detract from their ultimate satisfaction. Optimizing each step, however, allows you to create the conditions where clients "flow" through your working relationship friction-free.

“

Good business owners meet client expectations, great ones exceed them. The key to delivering a remarkable client experience every time is a seamless clientflow where expectations are set.”

– Oz Alon, cofounder and HoneyBook CEO



We studied what brings clients joy—so you don't have to

In partnership with Visa, HoneyBook commissioned research to better understand how clients choose their service providers and how they define great experiences. HoneyBook is the clientflow management platform that helps independents build and run successful businesses.

In this analysis, we determine which steps of working with an independent business are most impactful for client satisfaction. We zoom in on critical junctures to identify ways independents can optimize their clientflow, remove friction, and provide a consistent client experience every time. Our research taps into the perspectives and preferences of over 1,500 people who hired independents to provide specific business-to-business (B2B) and consumer services (B2C). By understanding their client journeys, we can identify ways to enhance the client experience and improve overall business outcomes—all for independents like you.

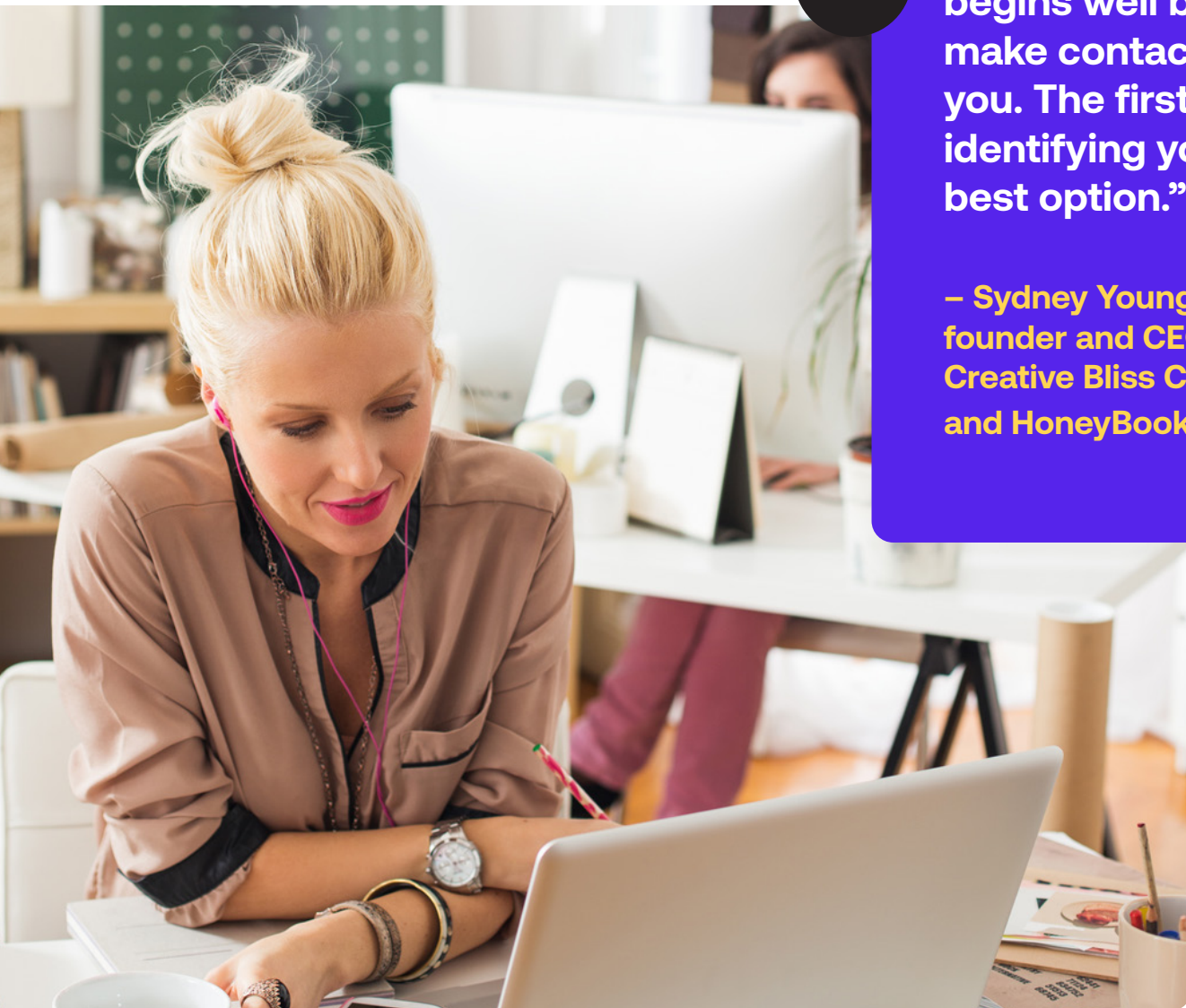
Who are independents? Hint: it's you!

Independents are business owners that provide personalized services specific to clients' needs. The business owner's skills and expertise are central to the service they provide. Independents include graphic designers, web developers, business coaches, photographers, and more.

Independents often work alone or in small teams and their goal is to build a flourishing business on their own terms, independent of a larger employer or parent organization.

Independent businesses are a rapidly growing segment of the workforce, increasing in size year over year. According to [MBO Partners](#), the number of independent workers grew 69% between 2020 and 2022 to 64.6 million.





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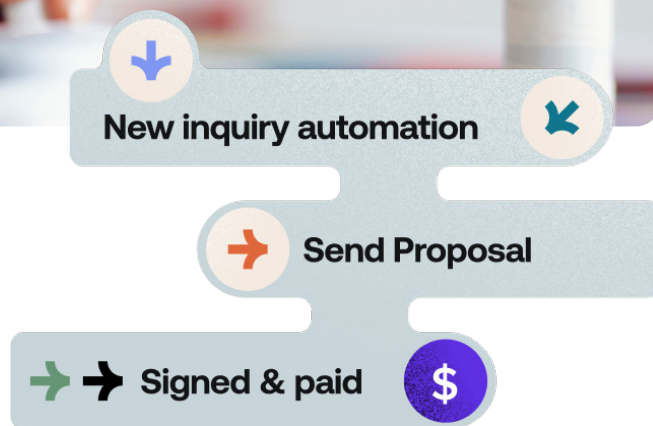
Your client's journey begins well before they make contact with you. The first step is identifying you as their best option.”

– Sydney Young,
founder and CEO of
Creative Bliss Collective
and HoneyBook Pro

What is a client journey?

We often think of direct interactions with clients as being the most influential moments of our relationship with them. It turns out, direct client interaction is just part of the picture.

The **client journey** begins before a prospect even encounters an independent business owner. Collecting prospective client information through a website form, for example, includes multiple touchpoints where the business owner isn't physically present. The entire journey from this point until the relationship concludes is called the clientflow. Each step presents an opportunity to create a streamlined, efficient, and enjoyable client experience.



What is a clientflow?

The independent business owner's **clientflow** is the complete process of selling and delivering services to clients. It represents both sides of the working relationship: the client-facing experience and the internal tasks an independent must complete such as creating a contract or invoice.

Existing terms like client experience, workflows, invoicing, and contract signing describe what goes into independent work, but clientflow encompasses the process in its entirety. The term considers the whole journey, tangible and interpersonal components alike, to fully define the way independent businesses operate.

“

Your clientflow is made up of individual steps, and each plays a role in creating an efficient process and optimal client experience.”

– Latrice Prater, strategic thought partner at The Digital Solutions Team and HoneyBook Pro

Here's what we've learned about the clientflow:

There are nine common steps in a typical clientflow that can be grouped into four larger phases. These steps cover the gamut from business discovery and service selection to project management and, ultimately, referral. If you provide personalized services to clients, these steps will be familiar to you, even if you're new to the term clientflow.

The clientflow

SELLING SERVICES

Business owner's workflow

Marketing

Making your ideal client aware of your business.

Mutual qualification

Responding to an inquiry as quickly as possible after qualifying the potential client.



Client experience

Research & information gathering

The client discovers a business owner and verifies that their services fit their needs.



Initial contact

The client's first point of contact with a business owner. This brings feelings of excitement and anticipation.

BOOKING

Service offering

The process of communicating the services offered and outlining the scope of work.

Contract

Creating the legally binding outline of the working relationship.



Invoice

Sending the invoice and receiving payment. You're now booked!

Selecting a service

Selecting the services that fit the clients needs. This moment can bring anxiety but also relief.



Contract signing

Agreeing to the terms of the working relationship brings a sense of security to the client.

Payment

Submitting payment according to the terms agreed to in the contract. The client feels relief, confidence and satisfaction.



MANAGING PROJECTS

Project execution

The process of providing the services agreed to in the contract including regular communication with the client.

Final deliverable

Delivering the final result of the working relationship to the client.



Receipt of services

Engaging with the business owner as is relevant to the services offered, this includes communication.



Receipt of deliverables

The services have been completed and the final deliverable received. This brings feelings of satisfaction for a job well done.

COLLECTING FEEDBACK

Project closure

Ending the project in whatever way is relevant to the services provided.

Ask for a review or referral

Asking your client to provide a review for the services and/or encouraging them to refer your services.

Renew

Inviting your client to renew your services.



End of working relationship

Payment of the invoice, providing feedback on the services rendered to the business owner.

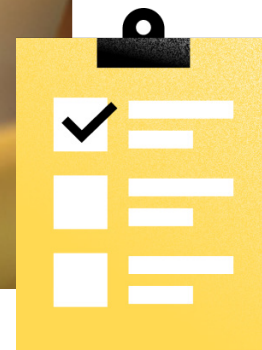
Provide a review or referral

Reflecting on the experience of working with the business and deciding to provide a review or referral. Happy clients are proud to show off their complete projects and tell others.



Decision to renew

Deciding whether to continue the working relationship with the independent business. A happy customer will come back again and again.



1 Each step is important, but some are more important than others

Our research identifies must-haves, client concerns, and ways to optimize each step of the clientflow to ensure it is streamlined and professional throughout. Before we dive into specific areas for improvement, we must consider the clientflow as a whole.

A client's journey is only as good as its weakest link. If signing the contract is a hassle, it will taint their feelings for the rest of the experience. If the invoice is wrong, a referral is unlikely. And if the process of doing repeat business is clunky, you've just lost the best kind of client: a recurring one. The same is true for every step in your clientflow. A disruption can derail an otherwise promising relationship.

The best journeys are the ones that feel effortless, where each step along the way has been refined and polished until clients can flow through from beginning to end with ease. Because of this, we must consider the clientflow as a whole. Independents who deliver the best clientflow are often the best in the business.

2 A smooth flow builds great relationships

As we know, a clientflow is the combination of the client-facing journey and the independent's internal workflow. It is the complete process of selling and delivering contracted services, personalized for individual client needs. As the name conveys, all these elements must “flow” together.

The concept of “flow” was popularized by the late Hungarian-American psychologist, Mihaly Csikszentmihalyi. A person can be in a flow state when they are deeply engaged in sports, music, art, or other pursuits. The activity comes together effortlessly to achieve their goal; the rest just fades away. They are “in the zone.”

Relationships are at the heart of every independent business. If the clientflow is good, a positive client relationship happens naturally. If there is friction along the way, it strains the connection, weakens trust, and jeopardizes repeat business.





3 Optimizing each step creates a seamless clientflow

In psychology, it's accomplished athletes, musicians, and artists that can achieve a flow state. They have put in the practice and the hours necessary to reach a place where they no longer have to think about how to aim, which note to play, or how to wield the brush. They have practiced their scales, run their laps, and perfected their craft. The same is true for a business that serves clients.

To provide clients with excellent service, you must put in the time to consider each element of the process, looking for ways to improve—ways to make the journey flow.

Our research reveals which touchpoints are the most important to clients. With our findings, we offer suggestions on how to remove friction so you can create an exceptional clientflow.

“

An optimized clientflow is a game-changer. Clients enjoy a seamless experience, tailored to their needs, and you focus on delivering your service without wasting time on busywork.”

– Latrice Prater, strategic thought partner at The Digital Solutions Team and HoneyBook Pro

How to improve your clientflow

While a clientflow encompasses the complete client and independent business owner journey, it is made up of distinct steps. We must consider each one and ask how they can be improved. Improvement at each step will lead to a stronger whole.

In this section we look at the relative importance of every step in a clientflow, and how each can be enhanced according to the B2C and B2B clients in the research.

As the service provider, you are only physically present for some of these stages. The research, selection, renewal, and referral stages are entirely in the client’s hands. As the independent business owner, you can’t directly see or control these steps, but it is essential that you make sure they flow smoothly. It’s important that the client has everything they could possibly need in those stages without you needing to intervene.



What do clients really think?

This chart shows the relative importance of each step in the clientflow in a business-to-consumer/client (B2C) context. It reveals that research/gathering information and initial contact are the **most important elements** for consumers, followed by the deliverable and the selection process.

The process of signing a contract can and should be made as easy as possible for clients, and likewise for the decision to renew, or provide a referral. Each step should be effortless.

Service providers tend to perform well on invoicing and communicating during the planning and execution stages, but these are not key drivers of consumer delight. They are table stakes. You must do them well. A lackluster experience during these steps represents a dangerous disruption to the clientflow that could jeopardize the overall impression a client has of working with you.

B2C clientflow: relative importance of each step to the client



What do business clients value?

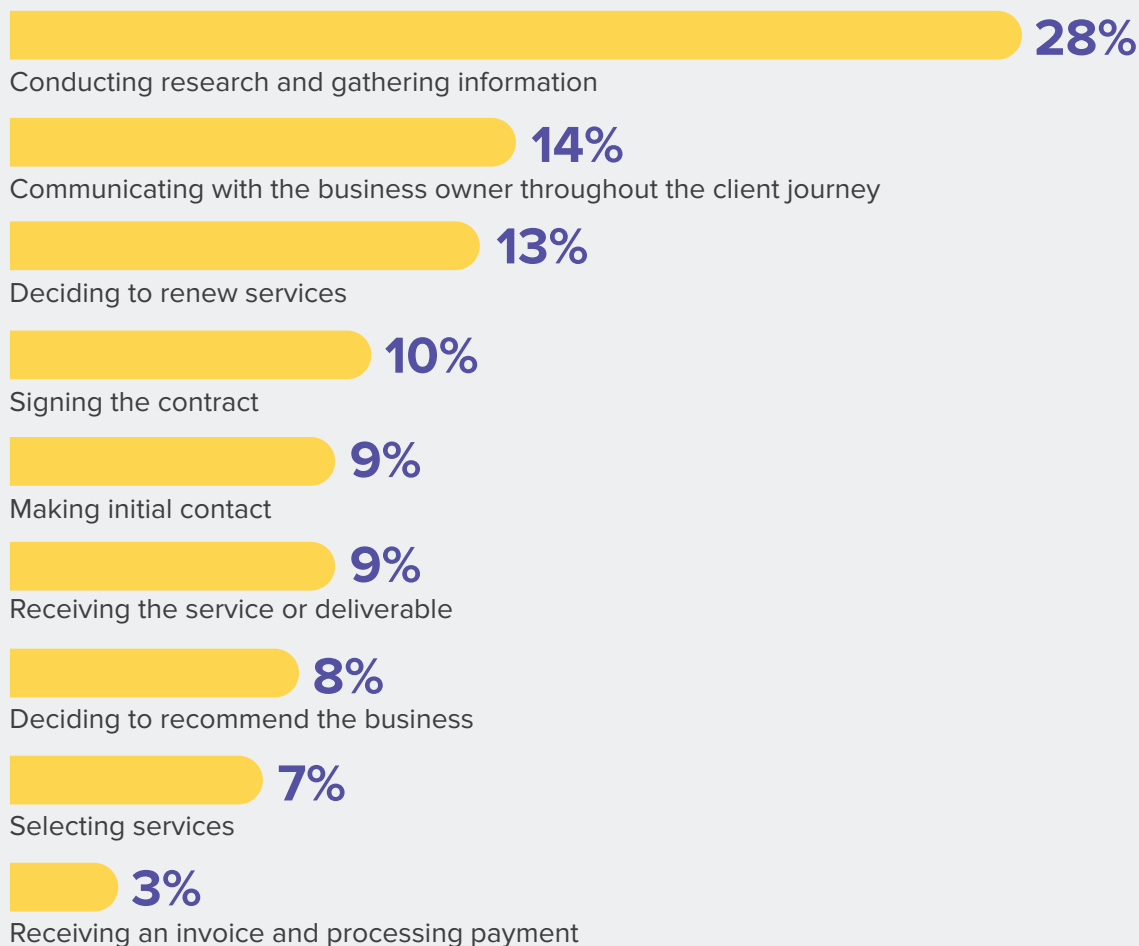
The priorities of business-to-business (B2B) clients are somewhat different. They are seeking services to support their business goals and they're more likely to hire for repeat projects or recurring support. So, the personal element of initial contact is less significant. But the research aspect is still incredibly important.

The deliverable is expected to be done well, and effective communication is also a priority.

The research also suggests that improving contract signing, invoicing, and rating or review requests will strengthen your clientflow if you serve business clients.



B2B clientflow: relative importance of each step to the client



“

Great client relationships are at the heart of every independent business. You can be the best at what you do but if you deliver a bad experience for your clients, none of it matters.”

– Natalie Franke, chief evangelist at HoneyBook



How to refine your clientflow step by step

This research reminds us that every aspect of the clientflow must be seamless to create an exceptional client experience. In this report, we'll dive into each step and pose questions to help you evaluate your current clientflow.

SELLING SERVICES **Discovery and information gathering**

The single most important step for both B2B and B2C clients is the research and information gathering stage. This stage determines if you are even worth considering for hire.

The information you offer about your business online is your brand ambassador. It speaks volumes about how well you understand your prospective client's needs and conveys your business's personality.

Win them over at this stage and you're in the running to land their business. Lose them here and they will be gone forever. And you may never even know they were looking into your services.

Discovery and information gathering accounts for 19% of the total importance score for clients and a whopping 28% of importance for business clients. Consumers tend to rate companies as performing better on information presentation and discovery (58% positive rating from consumers vs. 45% from B2B).

In a world of information overload, offering the answers to your prospective client's questions in a single click will be the difference between a booking and hitting the back button. Clear offerings that satisfy client intent are the key to catching their attention. Independents need to quickly deliver the main message while also providing enough depth to answer their prospect's questions.

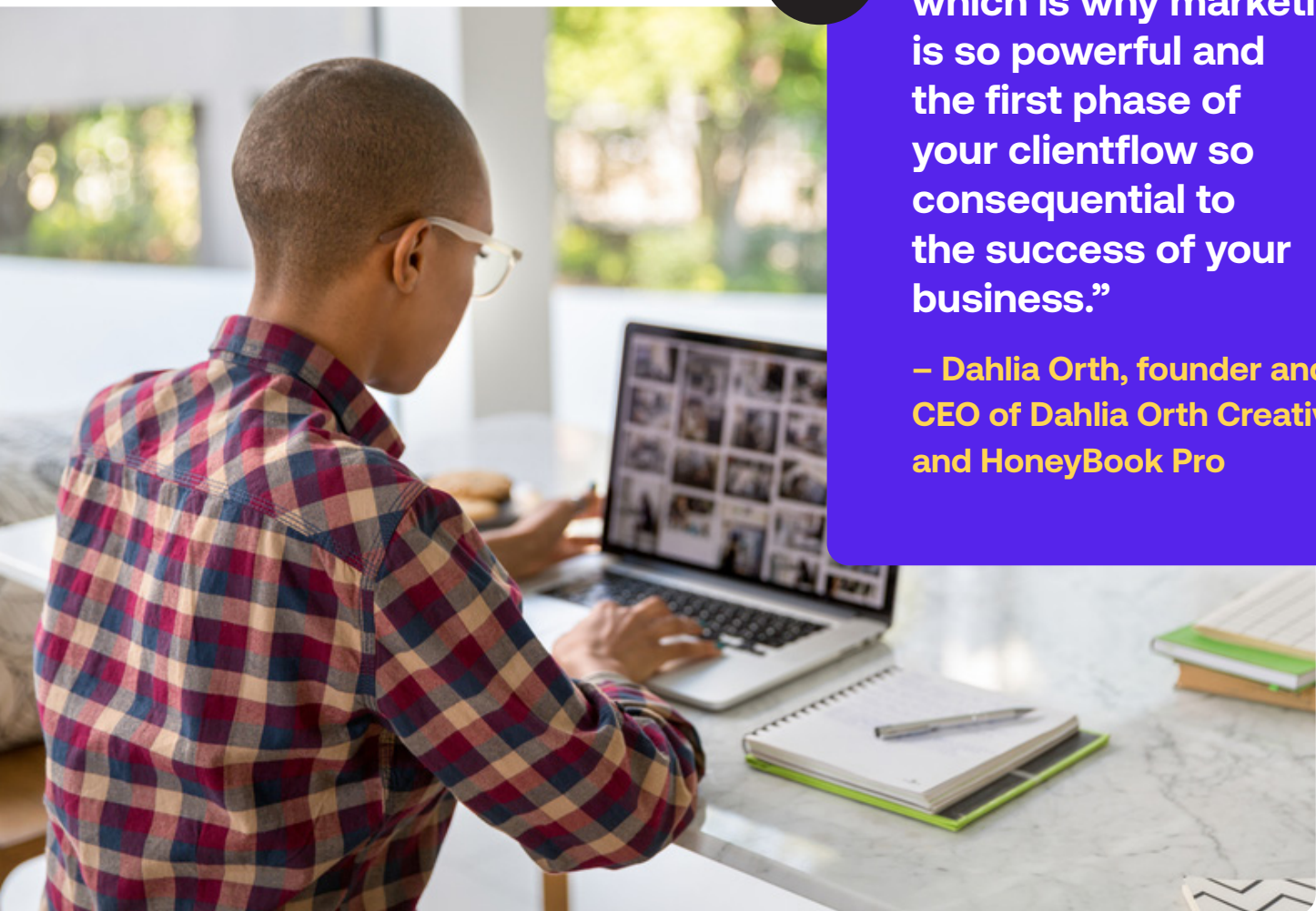


Ask yourself: Does my public-facing information convey everything potential buyers might want to know, clearly and concisely?

“

First impressions last, which is why marketing is so powerful and the first phase of your clientflow so consequential to the success of your business.”

– Dahlia Orth, founder and CEO of Dahlia Orth Creative and HoneyBook Pro





SELLING SERVICES Initial contact

First impressions matter. The initial contact phase is the second most important part of the journey for B2C and B2B clients.

“Your first impression of a thing sets up your subsequent beliefs,” says Nobel prize-winning psychologist, Daniel Kahneman. “If the company looks inept to you, you may assume everything else they do is inept.”

First impressions are formed in the blink of an eye. “People decide how appealing a visual image is after seeing it for only 50 milliseconds, and once they have decided, they stick to their decision,” says psychologist Gitte Lindgaard.

Beyond your website, the speed of your response has a significant influence over whether you will land a new client. People said a quick response was the reason they selected their service provider 86% of the time. A research participant explained that the speed of initial contact has “an important impact because if I had played phone tag or had messages go unanswered, that would have been a red flag.” This goes for scheduling preliminary meetings to determine the details of a client’s project.

A B2B client said the initial contact “sets the tone for all interactions moving forward. If I hadn’t spoken to a live person I may have moved on to the next business owner. However, though the service provider could not speak at the moment, he assured me he would call back. That was enough to keep me holding on to get the info to make the selection.”

Giving people a choice of how to connect is also important and can support efficient information gathering. As a consumer explained, “I feel I spent too much time on each website when the majority of my questions were answered, within minutes, on the phone.”



For consumers, this stage is the second most important. It accounts for 19% of the overall importance score. Half (53%) of consumers rate businesses well on this attribute, so there is room to improve. For B2B, the story is different in that first contact is much less important (9%), because there is more repeat business. But in the B2B world there is likewise room to improve (45% positive rating).

People's preferences are diverse, so it is important to have multiple ways for people to make contact.

Preferred source of initial contact



So, if you're wondering whether it is worth sprucing up your website to make sure it looks great, or whether you should get back to that prospect right now, the answer is yes. Initial contact is incredibly important.



Ask yourself: If someone looks at my website for a nanosecond, will their first impression be positive? Have I set up a system to respond to inquiries in a way that makes it clear their business is important to me?



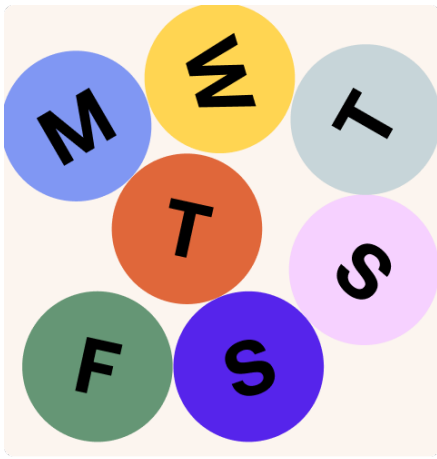


BOOKING Service selection

The selection process is when decisions are made. Decisions can make people nervous. “Selecting the business owner is the most critical step of the process,” a consumer said. “You have to take into consideration the person’s personality, the way the company operates, the quality of the product, the design presented, and cost. The last thing you want to do is agree to work with a business owner and, after payment has been sent, realize that it isn’t a good fit. At that point time and money have been wasted.”

In addition to making people nervous, the selection can also bring relief. “There is a feeling of [being] ‘finally free’ in terms of this selection. A huge weight lifted,” a consumer related. Another person explained how tension and relief can go together: “Going through the selection process, I felt as though I was irritated and relieved. I was irritated looking at proposals and quotes that were way beyond my budget and seeing that the business owner didn’t listen to anything I said. However, I was very relieved when I selected the business owner because I felt I found the perfect supplier that listened to my concerns and provided an amazing design.”

Comparing proposals is a challenge in the selection step. That’s why it is critical to understand what your ideal client’s needs are and clearly explain exactly how you will exceed them.



The selection step is the third most important for consumers (16% of importance) and fifth for B2B sales (9%). In both markets, just over half rate companies as doing well in these areas (59% consumers and 53% businesses).

Our research indicates that comparing proposals is a challenge in the selection step. That's why it is critical to understand what your best-fit client's needs are and lay out exactly how you will meet the client's needs.

By being transparent, you enable potential clients to make informed comparisons, and you know exactly what you are committing to. This way you and the client can come to a final decision that is best for everyone.

Compiling this information and presenting it takes time and effort, but it sets the stage for a successful working relationship. As one buyer explained "this step involved lots of communication and that went really well with this service provider. They laid everything out clearly, asked the right questions, and got to the heart of what I wanted. I felt confident they understood the scope of work I was looking for and could commit to delivering it."



Ask yourself: Have I laid out clearly, and with sufficient detail, exactly how I will meet each of the needs the potential buyer has expressed, in such a way that they can make informed comparisons and choices?



BOOKING Contract signing

Signing a contract sounds simple, but it is rarely simple in a digital landscape. If you've ever tried to sign or edit a PDF someone sent you over email, you know it can be a pain if you don't have the exact right software. Not to mention the back-and-forth created by saving and resending it.

The moment of contract signing should be the easiest step in your clientflow; it affirms that the client will have no doubts about their choice in working with you. Functionally, signing needs to be extremely simple—with clear instructions and a straightforward process.

Once signed, you must confirm receipt and communicate the next steps. This is an important part of reducing anxiety, as it ensures the client is aware of how the project will progress. "Once the contract was signed, we did receive it via email," a consumer reported. "However, we did have to follow up with the business owner to let them know it was completed. They did not automatically notify us the deposit was received and the contract signed." This represents an uncomfortable and unnecessary interruption of the clientflow.

This step is the fourth most important for businesses and the seventh most important for consumers. Around half say companies are doing it well (44% B2B, 52% B2C).



Ask yourself: Is the contract signing process simple enough that it can be done on a mobile device, and have I reassured my client by confirming receipt?





BOOKING Invoicing and payment

Invoicing and payment should be so seamless they are taken for granted. Ideally, invoicing should be completely integrated with the proposal and the contract. This increases efficiency, reduces room for error, and is more professional.

Asking for payments to a personal app like Venmo or Paypal doesn't present your brand and business in a professional, cohesive manner, and asking people to use older and outmoded forms of payment like paper checks or cash is often inconvenient. Our study shows that 80% of clients prefer paying with a credit card—and HoneyBook's payment processing allows for just that.

Consumers also want to receive invoices in a timely manner (your business isn't the only party with books to keep clean). The bill should never be a late and unwelcome surprise.

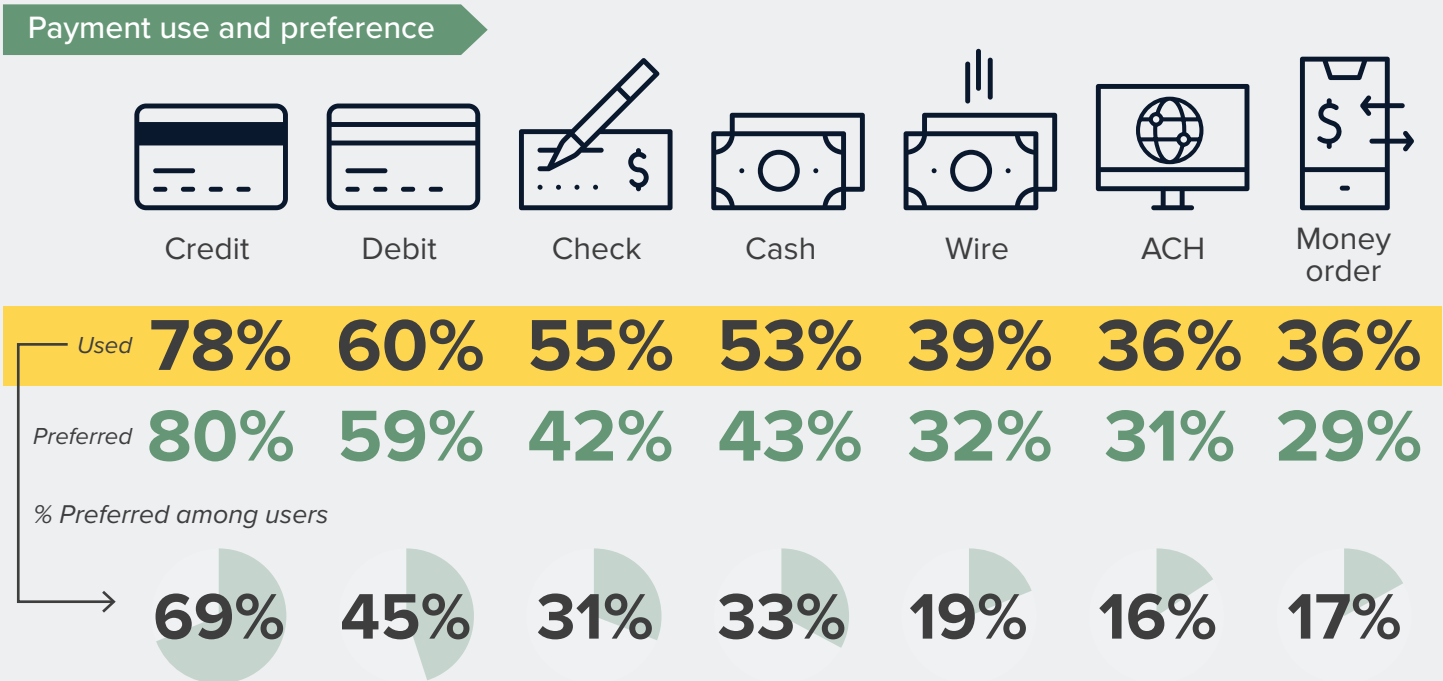
Predictable billing may not be exciting, but sometimes boring is what you need. Don't let something as straightforward as invoicing jeopardize the client experience you've spent so much time perfecting.

Getting a bill is expected, but not fun, so it's not surprising that it ranks lowest in importance for both consumers and businesses. However, there is definite room for improvement, as only about half (56% of consumers and 46% of businesses) rate companies as doing well on invoicing and payment.

Ask yourself: Can I integrate the invoice with the proposal and the contract? And is it scheduled to be delivered when my client expects it?



While credit and debit are overwhelmingly preferred, many customers are made to use a payment type that does not align with their preference.



Base: B2B+B2C, received an invoice and provided payment (n=1,472); used payment type and prefer it, bases vary Q18. Please tell us which payment type(s) you used with your service provider, and what would be your preferred payment types (s).

MANAGING PROJECTS Communication during execution

The progress bar or spinning wheel has become a universal symbol in our digital age to communicate that one's request is being processed. It's mesmerizing and reassuring. Yes, it can be annoying to watch it go round and round, but it is achieving its goal of saying "we're working on it, and we'll be with you very soon."

Once people have selected your service, signed the contract and paid, communication about progress will assure them they've made the right choice. Communication during execution is easy to overlook because you know you're working on it. But that's not always how clients see it. They're not with you every day and they don't know what you're doing. Yet they yearn to understand your progress because they've trusted you with an important task.





Building clear milestones into the proposal makes it easy to set expectations and then meet or exceed them. If clients understand the workflow, they'll rest easy knowing that the work is progressing as it should. Automating progress notifications keeps clients happy and allows you to focus on the task at hand: getting the job done.

Communication during execution ranks second most important for businesses, and fifth most important for consumers. Half of businesses rate service providers as doing well on this, as do 57% of consumers.



Ask yourself: Have I communicated exactly where we are in the project schedule, and what the next steps are? Have I ensured these touchpoints are seamlessly integrated into my clientflow?



MANAGING PROJECTS Deliverables

The deliverable is the moment of truth. If you've been clear with the client from the proposal through the contract steps there shouldn't be any negative surprises, only the delight of a vision becoming reality. When deliverables fail to impress, communication is typically to blame. It's a sign that the client did not fully understand what they were getting. This underscores the importance of clarity and transparency throughout your clientflow.

The deliverable should simply be the culmination of a process that has been clear and consistent from the get-go. The exception is when you exceed a client's expectations. When we get what we expect, it's good. When we get what we expect, plus a little bit more, we're thrilled.

Good surprises create the kind of warm memories that build bonds and generate referrals. When a client gets to brag to their friends and colleagues about the unexpected bonus they received, they get to pat themselves on the back for making a good choice—heck, a great choice!

“

A moment of surprise and delight can make a good client experience exceptional. It doesn't have to be expensive; just thoughtful.”

– Caitlyn Gray, founder and CEO of Systems & Strategy and HoneyBook Pro

Value-adds need not be costly or involved. In fact, they are better off being symbolic. If they are too big, they can veer past delighted surprise into puzzled shock. If you think the client might say “I wasn't expecting this,” you've gone too far. But if you can picture them saying “nice touch!” you're on target.

This step is the third most important to consumers and the sixth most important for businesses. Just over half of clients (60%) and businesses (53%) rate companies as performing well at deliverables.



Ask yourself: Have I made sure they got exactly what they expected, and have I found a small way to go the extra mile with surprise and delight?



COLLECTING FEEDBACK **Continue or renew**

If all has gone well throughout your clientflow, the decision to continue working with you should feel like a natural next step. For clients, continuing a relationship is a bonus because it circumvents the effort of research, contact, and selection. “We liked the first experience, so we decided to renew and have a designated person to turn to for our accounting needs” a buyer explained. “It was nice to have someone familiar with our business and not to have to start over each year.”

Deciding to use a service provider again reinforces a client’s perception that they made the right choice in the first place. “I hired the provider on an ‘as needed’ basis” a client explained. “So, just wanting to use them again is a great feeling.”

The decision to continue or renew is the third most important for businesses (who do more repeat buying) and the second to last for consumers. About half of clients (52%) and businesses (47%) rate companies as performing well at this step.



Ask yourself: Have I thanked the client for their business and told them I’d enjoy working with them again?





COLLECTING FEEDBACK **Review, recommendation, and referral**

Referrals are the inevitable outcome of a great clientflow. If a client had a great experience, they'll want to share it; helping someone out with a trusted recommendation feels good. Your clients feel like they're helping a friend or colleague with their research and selection. And they love it when someone comes back to them and says "hey, remember that business you told me about? They were great! Thanks."

Reviews are vital. According to fool.com, 95% of consumers read reviews before making a decision, and consumers spend 31% more when a business has strong reviews. According to [Search Engine Land](https://searchengineland.com), 87% of people won't consider a business an option if it has low ratings. You don't have to wait for reviews and recommendations to come to you: ask for them. When the job is done, and your client has had time to savor the results, automate a request. Make it easy for people to write a quick review or give you a simple rating, but don't pester.



“

Automations can be your time-saving secret weapon. Use them to gather feedback at the time of project closure and later to encourage a review or referral.”

– Sydney Young, founder and CEO of Creative Bliss Collective and HoneyBook Pro

Think about the last time someone asked you to rate them a five out of five to keep their boss happy. Even if you did give them the rating they asked for, you probably left with a bad taste in your mouth. And you likely won't be back.

Praise is like a smile, forcing it just doesn't work.

The review, recommendation, and referral step is sixth most important for consumers and seventh for businesses. Around half of consumers (55%) and businesses (47%) rate companies as doing well on this.



Ask yourself: Have I made it easy for my clients to share how they feel about my service?

Streamline your clientflow

When people hire you, they're engaged in a dynamic process that goes beyond what you as the independent business owner can see and experience. And while you might not be physically present for the entire clientflow, you can and must work to make it a seamless journey from beginning to end. This way, your clients will feel like you are with them each step of the way.

Clients see many stages of the purchase process: They do research, reach out for pricing, make choices, sign contracts, pay, look for updates, wait for delivery, and then decide if they want to continue working with you or recommend your services.

When you review your clientflow, you are sure to find ways to improve the client experience and make your work more effective, too. Improving your clientflow is the best way to enhance your business with a clientflow management platform like HoneyBook, you have the tools to do it.





About the research

The research consisted of a qualitative discussion board with 24 participants and a quantitative survey of 1,500 customers. Of the 1,500, 1,000 participants were B2C and 500 were B2B. All were screened to ensure they had purchased services from independent business owners in the last 6 months and had spent between \$500 and \$30,000 with an independent business. The study was fielded in September and October 2021.

The research was sponsored by HoneyBook and their partner Visa, and conducted by the Maru Group.

About HoneyBook

HoneyBook is the leading clientflow management platform that makes it easy for independent business owners to sell and deliver their services online. Offering powerful tools for communication, contracts, invoicing, payments, and more, the platform puts independent professionals in control of their process and client experience. HoneyBook is trusted by over 100,000 service-based businesses in the United States and Canada that have booked more than \$9 billion in business on the platform. The company has offices in San Francisco and Tel Aviv, with remote staff worldwide. Learn more at HoneyBook.com

About Visa

Visa (NYSE: V) is a world leader in digital payments, facilitating more than 215 billion payments transactions between consumers, merchants, financial institutions and government entities across more than 200 countries and territories each year. Our mission is to connect the world through the most innovative, convenient, reliable and secure payments network, enabling individuals, businesses and economies to thrive. We believe that economies that include everyone everywhere, uplift everyone everywhere and see access as foundational to the future of money movement. Learn more at [Visa.com](https://www.visa.com).

