

The Client
Journey
Workbook

Discover what's working, what's holding you back,
and the next steps to scale with confidence.

DEAURA CLIENT STRATEGIC TOOL

Less hustle, more systems.

Read *First*

What this workbook is, and how it works for you.

WELCOME

Most founders spend their time on the loud parts of the business. Marketing, content, visibility. Very few ever stop to map what actually happens after someone discovers their business.

The result: leads fall through cracks, potential clients disappear, follow-up becomes inconsistent, growth feels harder than it should. The truth is that growth is almost never a traffic problem. It is a leak problem.

This workbook maps your full client journey across nine stages. By the end, you will have scored every stage, identified your three biggest leaks, and have a clear picture of what to fix first.

Built for

- ▶ Founders mid-build with DeAura.
- ▶ Clients prepping for a strategy session.
- ▶ Anyone wanting to track the system across quarters.

You will walk away with

- ▶ A score for every stage of your client journey.
- ▶ Your three biggest leaks named in plain language.
- ▶ A clear action plan for your next strategy call.

Most businesses do not need more complexity. They need better systems.

How To Use This

The workbook is built to be filled, then re-filled.

INSTRUCTIONS

01

Work through every stage in order.

Each stage takes about 5 minutes. Do not skip ahead. The Foundations stage uncovers leaks that explain the rest of the journey.

02

Be honest, not optimistic.

If a system exists but is held together by you remembering to do it, it does not count. Score it as the leak it is.

03

Score each stage.

Tick the statements that are true for your business today. Give yourself half a point if something is partially implemented. Add up your points for a total stage score.

04

Name the leak in five words.

Each stage has a single line for the biggest leak. Five words or less forces clarity. If you cannot say it in five words, you do not know what it is yet.

05

Calculate your total on page 13.

Add every stage score. Out of 45. Your tier and your three priority leaks come from this number.

06

Re-score in 90 days.

Track the delta. This is how compounding shows up. Date the workbook every time you fill it.

DATE TRACKING

First scored: _____

Re-scored: _____

Re-scored: _____

Stage 00 Foundations

Offer, ICA, mechanism. Everything else builds on this.

LUCKY METHOD PHASE 0

The most common leak in the entire journey lives here. A fuzzy ICA, a vague transformation, or an offer that does not bridge from your freebie. When the foundation is unclear, every stage downstream leaks. No funnel can fix this.

WHAT GOOD LOOKS LIKE

- ▶ You can describe your ICA in one sentence with a specific pain and outcome.
- ▶ Your offer's transformation is one sentence. Outcome, not feature list.
- ▶ Your freebie naturally bridges to your paid offer, not a stretch.
- ▶ Sales assets are ready: proposal, case study, FAQ, pricing.

DIAGNOSE YOURSELF

- ☐ I can name my ICA in one sentence with their specific pain.
- ☐ My offer's outcome is articulated in one sentence.
- ☐ My freebie leads naturally to my paid offer.
- ☐ I have sales assets ready (proposal, case study, FAQ).
- ☐ I can name the result my offer produces, with proof.

/ 5

Stage score

After the diagnostic above.

Biggest leak in this stage

Five words or less.

Stage 01 *Discovery*

How ideal clients first find you.

LUCKY METHOD PHASE 1

Discovery is the loudest stage. Most founders pour energy into visibility and ignore the layers below. The leak here is not lack of leads. It is leads from the wrong channels, or leads that arrive faster than your system can hold them.

WHAT GOOD LOOKS LIKE

- ▶ One primary channel consistently brings ideal-fit leads.
- ▶ Source-to-buyer tracked, not just source-to-lead.
- ▶ Discovery is no longer dependent on daily posting.
- ▶ A second channel exists as backup or testing layer.

DIAGNOSE YOURSELF

- ☐ I know exactly which channel produces my highest-quality leads.
- ☐ Discovery is consistent. Not feast or famine.
- ☐ A system drives traffic without me posting every day.
- ☐ I track source-to-buyer, not just source-to-lead.
- ☐ My top channel matches where my ICA actually spends time.

/ 5

Stage score

After the diagnostic above.

Biggest leak in this stage

Five words or less.

Stage 02 Capture

From interested to logged lead.

LUCKY METHOD PHASE 2

Capture is where invisible revenue disappears. Leads opt in via DMs, comments, and scattered forms. Some get logged. Most do not. By the time you go to follow up, half the names are gone and the warm ones have cooled.

WHAT GOOD LOOKS LIKE

- ▶ Every lead enters a CRM automatically. No manual entry.
- ▶ Leads are tagged by source on capture.
- ▶ Leads are tagged by warmth: cold, warm, hot.
- ▶ You can see your full pipeline at any moment.

DIAGNOSE YOURSELF

- ☐ Every lead is captured automatically, no manual entry.
- ☐ Leads are tagged by source as they enter.
- ☐ Leads are tagged by warmth and status.
- ☐ I can see my full pipeline at any moment.
- ☐ Leads do not fall through cracks. Ever.

/ 5

Stage score

After the diagnostic above.

Biggest leak in this stage

Five words or less.

Stage 03 Nurture

Trust built before any call.

LUCKY METHOD PHASE 4 • NURTURE

Most founders nurture in DMs, case by case. Trust is built on luck and timing. The leak: leads who would have bought never hear from you twice. The fix is an automated sequence that walks every lead through your story, value, and proof before a sales call is ever booked.

WHAT GOOD LOOKS LIKE

- ▶ An automated 14-day email sequence triggers on opt-in.
- ▶ Five emails: value, story, resource, proof, soft pitch.
- ▶ Trust is built before any sales call happens.
- ▶ Calls are with warm leads, not cold ones.

DIAGNOSE YOURSELF

- ☐ An automated email sequence fires when someone opts in.
- ☐ A story email builds emotional connection.
- ☐ A credibility email anchors a real client result.
- ☐ A soft pitch email leads to a call or checkout.
- ☐ Leads hear from me consistently after they opt in.

/ 5

Stage score

After the diagnostic above.

Biggest leak in this stage

Five words or less.

Stage 04 Booking

Interest to scheduled call.

LUCKY METHOD PHASE 5 + 6 · INVITATION + CALL

Booking is where speed kills revenue. Every back and forth DM, every questionnaire email, every reschedule is a friction point. Founders who book calls manually lose 20 to 40 percent of warm leads to inertia alone.

WHAT GOOD LOOKS LIKE

- ▶ Leads can book a call in under two minutes.
- ▶ A pre-call questionnaire qualifies them automatically.
- ▶ Reminders fire 24 hours and 1 hour before the call.
- ▶ Auto-transcription captures the call without you taking notes.

DIAGNOSE YOURSELF

- ☐ Leads can book a call in under 2 minutes.
- ☐ A questionnaire qualifies them before the call.
- ☐ Reminders are sent automatically.
- ☐ My no-show rate is under 20 percent.
- ☐ Booking is one click from the email or sales page.

/ 5

Stage score

After the diagnostic above.

Biggest leak in this stage

Five words or less.

Stage 05 Sales

Call to signed contract.

LUCKY METHOD PHASE 6 + 7 · CALL + PROPOSAL

Sales is where founders lose money they already earned. Proposals drafted manually take days. Contracts get sent late. Follow-up gets forgotten. The leak compounds: every day a proposal sits, your close rate drops.

WHAT GOOD LOOKS LIKE

- ▶ A consistent sales conversation framework, not improvisation.
- ▶ Proposal sent within 24 hours of the call.
- ▶ Contract and Stripe invoice auto-generate on a yes.
- ▶ Failed payments trigger an automated recovery sequence.

DIAGNOSE YOURSELF

- ☐ I follow a consistent sales conversation structure.
- ☐ Proposals are sent within 24 hours of the call.
- ☐ Contracts auto-generate when the client says yes.
- ☐ Failed payments trigger automated recovery.
- ☐ I track my close rate by source and by month.

/ 5

Stage score

After the diagnostic above.

Biggest leak in this stage

Five words or less.

Stage 06 Onboarding

First 48 hours as a client.

LUCKY METHOD PHASE 8 · ONBOARDING

Onboarding sets the entire client experience tone. A manual welcome, a delayed kickoff, a missing form, and the client starts wondering if they made the right call. The leak shows up later in low retention and missing testimonials.

WHAT GOOD LOOKS LIKE

- ▶ A welcome experience fires automatically on payment.
- ▶ Onboarding form sent and tracked immediately.
- ▶ A project space (Notion or similar) is auto-created.
- ▶ One clear what-happens-next message at every step.

DIAGNOSE YOURSELF

- ☐ A welcome experience fires automatically on payment.
- ☐ The onboarding form is sent and tracked.
- ☐ A project space is created automatically.
- ☐ New clients have one clear what-happens-next message.
- ☐ Onboarding is fully documented as a repeatable process.

/ 5

Stage score

After the diagnostic above.

Biggest leak in this stage

Five words or less.

Stage 07 Delivery

How clients experience the work.

INTERNAL OPERATIONS LAYER

Delivery is where premium positioning either holds or breaks. If process is inconsistent per client, if updates come over WhatsApp at random hours, if every project feels like a custom build from scratch, you are doing freelance work and charging agency prices.

WHAT GOOD LOOKS LIKE

- ▶ Delivery process is the same for every client.
- ▶ Clients always know what is happening next.
- ▶ Check-ins and milestones are systematized.
- ▶ Internal SOPs are documented and followed.

DIAGNOSE YOURSELF

- ☐ Delivery process is consistent across every client.
- ☐ Clients always know what is happening next.
- ☐ Check-ins are scheduled, not random.
- ☐ Internal SOPs are documented and used.
- ☐ I could hand a project off to a team member with confidence.

/ 5

Stage score

After the diagnostic above.

Biggest leak in this stage

Five words or less.

Stage 08 Retention & Referrals

Project ends. The relationship does not.

LUCKY METHOD PHASE 9 · OFFBOARDING + REFERRAL LOOP

The most underbuilt stage in almost every business. The project ends, the client disappears, no testimonial is captured at peak excitement, and the referral that should have come never does. Past clients are your highest-trust lead source. Almost nobody uses them on purpose.

WHAT GOOD LOOKS LIKE

- ▶ Warm close email fires at project completion.
- ▶ Testimonial request is timed to peak excitement.
- ▶ Referral ask is built into the offboarding sequence.
- ▶ Past clients re-enter a nurture loop, not the void.

DIAGNOSE YOURSELF

- ☐ A warm close email fires at project completion.
- ☐ Testimonial requests are automated at the right moment.
- ☐ A referral ask is built into offboarding.
- ☐ Past clients are in an ongoing nurture sequence.
- ☐ Past clients return or refer regularly.

/ 5

Stage score

After the diagnostic above.

Biggest leak in this stage

Five words or less.

Your *Diagnosis*

Add every stage score. Out of 90.

YOUR TOTAL

/ 45

Sum of all nine stage scores.

WHAT YOUR SCORE MEANS

Stage by stage

00 Foundations	_____ / 05
01 Discovery	_____ / 05
02 Capture	_____ / 05
03 Nurture	_____ / 05
04 Booking	_____ / 05
05 Sales	_____ / 05
06 Onboarding	_____ / 05
07 Delivery	_____ / 05
08 Retention & Referrals	_____ / 05

BELOW 22

Foundation

Foundations and Capture are not stable. Effort upstream gets wasted downstream. Focus: lock Stage 00 and 02 first.

23 TO 34

Building

The system functions but leaks. Specific phases need work. Focus: name the three priority leaks and rebuild in order.

35 TO 45

Scaling-Ready

The system is solid. Optimization and volume become the levers. Focus: traffic, retention, and the Flow layer.

My tier: _____

Circle one above: *Foundation · Building · Scaling-Ready*

Your Action Plan

Three leaks. Three priorities. One conversation.

WHAT HAPPENS NEXT

Look back at every stage. Find the three stages with the lowest scores. Those are your priority leaks. Most progress comes from fixing fewer things, properly. Not all of them, badly. Name them below. Bring this page to your next strategy call.

01

Priority leak · Stage: _____

Why this one:

What we will fix in the next 30 days:

02

Priority leak · Stage: _____

Why this one:

What we will fix in the next 30 days:

03

Priority leak · Stage: _____

Why this one:

What we will fix in the next 30 days:

Bring this workbook to your next strategy call. Re-score in 90 days. Track the delta.