

# Personal Strategy Mapping

## Module 8: Understanding your clients' journeys

Use this worksheet to map out a real client file and identify where a value-adding solution (upsell) could genuinely improve their outcome.

### Step 1

**Pick one of your clients and note the goals you know they have below.**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### Step 2

**List possible aligned strategies that could genuinely help both of you.**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### Step 3

**Craft your upsell using the 3-point pitch strategy.**

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