

YOURCXC

THEY HAD THE TRAFFIC.
WE FIXED THE JOURNEY.

SEE HOW A SMALL TEAM WENT FROM MISSED INQUIRIES TO CONSISTENT CONVERSIONS—
IN JUST 60 DAYS.

Business Type:

Independent Accounting Firm

Location:

Oxford, UK

Team Size:

12 staff

Client Since:

Q3 2024

This well-established firm had a loyal client base but was struggling to convert new inquiries into paying clients. Their onboarding process felt disjointed—from web inquiries to consultation booking and document collection.

CLIENT OVERVIEW

THE CHALLENGE

Despite generating strong traffic and inquiries via their website and local SEO, their conversion rate from inquiry to client was just 18%. Prospects would fill out the contact form but wouldn't follow through with a consultation. Internally, the team lacked a clear process for handling new leads.

Key issues:

No automated follow-up system

Over-reliance on email for communication

Confusing welcome journey for new clients

No clear ownership of the onboarding process

We began with a full Customer Journey Mapping Workshop, engaging both admin and senior partners. Using YourCXC's Journey Mapping Template, we outlined each stage of the client experience—from first website visit to post-engagement.

We then:

Audited the firm's inquiry and consultation booking process

Created a new onboarding journey using visual flowcharts

Introduced a simple SOP for lead handover and welcome steps

Implemented automated email follow-ups using Calendly + MailerLite

OUR APPROACH

SOLUTIONS IMPLEMENTED

Customer Journey Map for onboarding, delivery, and renewal

Touchpoint Audit to highlight weak follow-up and unclear messaging

Branded Welcome Pack for new clients (including timeline + checklist)

Lead capture automation (auto-response email + appointment reminder)

Internal roles clarified for onboarding tasks

Consultation bookings increased by 45%

Response time to inquiries dropped from 36 hours to under 12

Received positive feedback from new clients on clarity of communication

Staff reported better coordination and reduced miscommunication

RESULTS
[WITHIN 60 DAYS]

CLIENT QUOTE

“Working with YourCXC helped us see our practice through the client’s eyes.

We thought we had a decent process—turns out we were losing people early.

Now, we feel in control of every step.”

Managing Partner, Oxford Accounting Firm

YOURCXC

**FIX THE EXPERIENCE.
GROW THE REVENUE.**

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