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CASE STUDY 06 · LEADERSHIP DEVELOPMENT

Turned Broad Ideas Into a Defined Service & Digital Client Journey

Stakeholder alignment, service design, user journey strategy, custom assessment technology, and automated lead development infrastructure for a startup-stage offering.

STAKEHOLDER ALIGNMENT · SERVICE DESIGN · USER JOURNEY STRATEGY · DIGITAL INFRASTRUCTURE

ENGAGEMENT SUMMARY

A four-person educator team had a strong shared vision for leadership development, but the offering, audience, digital presentation, and client journey had not yet been fully defined. The engagement translated those ideas into a cohesive service model and the digital infrastructure needed to support discovery, lead capture, automated follow-up, and personal outreach.

ROLE

Business Strategy, Service Design & Digital Infrastructure

PROJECT OVERVIEW

Facilitated strategic discussions with four educators to align different perspectives around what the startup would offer, who it was designed to serve, how the value should be communicated, and what a prospective client should experience from first discovery through follow-up. Defined the digital landscape around that journey, then built a custom assessment experience, automated result delivery, lead notifications, email follow-up, and the supporting website infrastructure. Training and handoff were included so the team could confidently manage and use the system after launch.

ENGAGEMENT CONTEXT Because the engagement centered on defining and launching a startup offering, the case is documented through strategy, system architecture, and implementation rather than mature operating metrics.

STRATEGIC RESPONSE

From shared ideas to a usable business system

The project required more than a website. The team first needed alignment around the service itself, the audiences it could serve, the path a prospective client should follow, and the technology required to support that experience without creating unnecessary manual work.

CHALLENGE

Multiple perspectives, no single offer

Four educators brought complementary expertise and ideas, but the service needed a shared structure, language, and direction before it could be presented to the market.

Unclear audience and client pathway

The team needed to determine who the service was for, what those audiences needed to understand, and how prospects should move from curiosity to meaningful engagement.

A lead magnet needed real utility

A simple downloadable resource would not adequately demonstrate the team's expertise or create a meaningful reason for prospects to engage.

Follow-up could not rely on memory

Assessment leads needed immediate communication while still giving staff visibility and an opportunity to build a personal relationship.

STRATEGIC RESPONSE

- **Create stakeholder alignment**

  Facilitated strategy discussions that consolidated different viewpoints into a clearer offering, common language, defined priorities, and a more unified client-facing concept.

- **Design the user journey**

  Clarified audience groups, decision points, messaging needs, calls to action, and the progression from website discovery through assessment, result delivery, and personal follow-up.

- **Build a custom assessment experience**

  Developed a custom leadership assessment using Wix Velo and CMS functionality to capture responses, process inputs, generate an initial personalized result, and convert interest into a qualified lead.

- **Create an automated lead engine**

  Connected assessment completion to personalized result emails, follow-up automation, internal staff notifications, and a clear handoff for direct human outreach.

WHAT WAS BUILT

A connected digital landscape that supported both the prospect experience and the team behind it

→ **Service & Positioning Framework**

Translated broad ideas into a more defined offering, audience structure, messaging direction, and client-facing service experience.

→ **Audience & Journey Architecture**

Structured the pathway from first website visit through education, assessment participation, result delivery, follow-up, and potential engagement.

→ **Custom Leadership Assessment**

Built front-end and back-end assessment functionality using Wix Velo and CMS logic to capture user information, process responses, and generate an initial personalized result.

→ **Automated Lead Engine**

Connected personalized result emails, follow-up automation, and internal staff notifications so every lead received an immediate response and the team could follow up personally.

WHAT THIS PROJECT

DEMONSTRATES

Stakeholder Alignment · Business Consulting · Service Design · User Journey Strategy · Solution Architecture · Custom Digital Infrastructure · Marketing Automation · Lead Management · Team Training