IDEAL CLIENT PROFILE WORKSHEET

Overview

One way to grow your business faster is to attract and cross-sell ideal clients. These are the types of clients that appreciate what you do and can buy everything that you sell.

Unless you have a limitless marketing budget and massive sales team, trying to sell to everyone is a recipe for failure. Both your message and efforts get diluted, lost in a vast ocean of noise. Plus, you end up wasting a lot of time talking to prospects who really don’t value what you do.

It’s kind of like your garden hose. When you first turn it on, there is a stream of water, but not much pressure. When you add a nozzle to the end, you can focus the stream of water and create pressure. The more you focus your stream of water, the more effective you can be. Similarly, the more you focus your marketing and sales efforts around ideal clients, the faster you can grow your business.

In this worksheet, we will help guide you through the process of developing your Ideal Client Profile. The process has 3 sections:

1. **Realize Lifetime Value**: Documenting financial goals & calculating the 10-year revenue potential of an Ideal Client
2. **Evaluate the Fit**: Evaluating the clients that are a good fit for your business by thinking about actual clients that you serve
3. **Document Your Ideal Client Profile**: This Ideal Client Profile does not describe any particular client, but instead is a representation of the perfect client that can buy everything that you sell and that you are operationally optimized to serve

If you need help filling out this worksheet, please reach out to Bill Poole at [bpoole@convergo.co](mailto:bpoole@convergo.co).

REALIZING LIFETIME VALUE WORKSHEET

**VALUE PER CLIENT**

Use this page to document your financial goals and estimate what your clients bring to your business.

What is your 3-Year Revenue Goal $\_\_\_\_\_\_\_\_\_\_\_\_\_

Write down your current revenue per client (Total Annual Revenue/# of Clients) $\_\_\_\_\_\_\_\_\_\_\_\_\_

Estimate the 10-year revenue value of a client that is an ideal fit for your business: $\_\_\_\_\_\_\_\_\_\_\_\_\_

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**10-YEAR VALUE**

Use this worksheet to estimate the 10-year value of an ideal client. This is a rough estimate to give you an idea of the potential of an “all-in” ideal client that buys everything you offer. [Check out an example](https://fs.hubspotusercontent00.net/hubfs/492152/Assets/Realizing%20the%20lifetime%20value%20of%20an%20ideal%20client.pdf).

| PRODUCT/SERVICE | QUANTITY | REVENUE POTENTIAL | 10-YEAR REVENUE POTENTIAL |
| --- | --- | --- | --- |
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| **TOTAL 10-YEAR REVENUE POTENTIAL PER IDEAL CLIENT** | | |  |
| **ANNUAL REVENUE POTENTIAL PER IDEAL CLIENT** | | |  |
| **CURRENT ANNUAL REVENUE PER CLIENT** | | |  |

## **REFLECTION QUESTIONS**

How close was your estimate?

How many 100% Sold Ideal Clients would it take to hit your 3-year goal?

What other insights did you gain as a result of this exercise?

IDEAL CLIENT PROFILE WORKSHEET

**EVALUATE THE FIT**

Use this worksheet to align your company core values with the things you like about your favorite clients. This will guide the psychographic part of your Ideal Client Profile.

| COMPANY CORE VALUES  List your company values in this part of the worksheet to get you ready to think through the clients that are ideal for you to serve. |
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| **BEST FIT CLIENT NAME** | **WHAT YOU LIKE ABOUT WORKING WITH THEM?**  List a couple of actual clients that you feel are best-fits for your business, and what you like about working for them. Pick clients that can buy everything that you sell and are easy for your operations team to profitably serve, as opposed to clients that just generate a lot of revenue. |
| --- | --- |
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**WHO ARE THE DECISION MAKERS AND INFLUENCERS**

Who is involved in buying decisions?

| **NAME/POSITION** | **WHAT THEY LIKE ABOUT WHAT YOU DO FOR THEM** |
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IDEAL CLIENT PROFILE WORKSHEET

**DOCUMENT YOUR IDEAL CLIENT PROFILE**

Follow along in [the accompanying deck](https://fs.hubspotusercontent00.net/hubfs/492152/Assets/Exercise%20-%20Do%20I%20know%20my%20Ideal%20Clients.pptx) to help guide you through filling out the profile.

| **DESCRIPTION**  Based on what you wrote above, how would you describe your Ideal Client to create a profile? |
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|

| **DATA POINTS**  Data points | **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  Estimate of how many establishments meet this criteria |
| --- | --- |
| Size  Revenue or Employees |  |
| Geography |  |
| Specific Traits  Example: Industry, Association Member, Software Brand User |  |

| **PERSONAS: DECISION MAKERS & INFLUENCERS**  Who is involved in buying decisions? | |
| --- | --- |
| **POSITION** | **DESIRED OUTCOMES** What goal do they want to achieve or problem do they need to solve? Need help? [Read this blog](https://www.convergo.co/marketing/buyers-dont-buy-products-they-buy-outcomes/). |
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If you’d like to read more about ideal clients, check out [this blog](https://www.convergo.co/eos/the-power-of-the-list-to-grow-revenue-faster/) on the power of having the right list and [this blog](https://www.convergo.co/sales/3-filters-for-your-ideal-client-profile/) on 3 simple filters to help you narrow your focus.

| [**WANT TO LEARN MORE?** SCHEDULE AN EXPLORE MEETING WITH US](https://www.convergo.co/explore/) |
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