

V1 - Ideal Client Worksheet

Establishing your Ideal Client Profile

Best Clients – Step 1	Characteristics of best Clients – Step 3	Key Characteristics of your ideal Client – Step 5	Characteristics of worst Clients – Step 4	Worst Clients – Step 2
<ul style="list-style-type: none"> • Select your few BEST past and current clients • Definition of BEST is up to you – maybe a mix of most profitable, best advocate to others, most longstanding etc. 	<ul style="list-style-type: none"> • From the best clients you identified in Step 1 select the positive characteristics that are ‘common or unique’ • Consider demographic and psychographic factors 	<ul style="list-style-type: none"> • Transfer only most significant characteristics of best and worst clients • For the worst clients, use the opposite of their characteristics for your ideal client profile, so for example, ‘has no appetite to manage risk’ may might translate to, ‘excellent commitment to focused risk management’ • These factors form your Ideal Client Profile 	<ul style="list-style-type: none"> • List the negative characteristics that are ‘common or unique’ to your worst clients • Consider both demographic and psychographic factors. • Latter may include ‘Puts the Broker under competition every year’, ‘has no appetite to manage risk’ 	<ul style="list-style-type: none"> • Select POOREST or WORST few clients • Again you define what this means

This worksheet was adapted from ‘*The New Strategic Selling*’ 3rd Edition [Miller, Heiman and Tuleja]