

Ideal Client Workbook

Use this workbook to create an Ideal Client Profile based on your personal preferences and the common characteristics of your existing ideal clients.





A key part of an advisor's success is being able to clearly articulate their ideal client. By defining your ideal client, you are able to develop more effective business development strategies, create a more tailored client experience, and spend time with people you enjoy.

Defining your ideal client is a straightforward process:

- 1** Know yourself, your purpose, and your passions
- 2** Identify 5-10 clients you would love to replicate
- 3** Determine commonalities among your existing ideal clients
- 4** Create an ideal client profile based on your personal preferences and common traits of your favorite clients



Know Yourself

Discern the important personal values and characteristics that influence the types of clients you enjoy working with.

Note key points about yourself that may influence the types of clients you naturally work best with.

- » What is your “why”?
- » Why did you get into the industry in the first place?
- » How has your perspective changed since you started in this line of work?
- » What is your purpose in life?
- » What are your personal values?
- » Who are the people you naturally want to help?
- » Who would you like to give back to?
- » What’s your “story”?
- » What is your value proposition?

Identify 5-10 existing ideal clients

Who are the clients you would most want to replicate?

Make a list of 5-10 existing clients you would love to clone. In general, they should be profitable and enjoyable to work with, you should be able to add value to their financial situation, and they should value your work together.

- » Who are your favorite current clients?
- » Who are your most profitable clients?
- » Who are the clients that, when you look on your calendar and see the person's name, you are excited to spend time with them?
- » For which clients do you think you've had the biggest impact?
- » Who does your team like to work with?
- » Who are the clients that are your cheerleaders, referral sources, or centers of influence?
- » Who were the easiest clients to bring on? Why was that?



Determine commonalities

What are the profiles of your existing ideal clients, and what do they have in common?

Start by taking an inventory of the clients you listed in step #2. Using the following pages, make notes about important demographical and qualitative traits, using ideas from this list:

Demographic info:

- » Age
- » AUM
- » Income level
- » Profession
- » Employer
- » Education level
- » Family profile
- » Life events (divorced, retired, widowed, etc)

Interests & characteristics:

- » Planning complexity & needs
- » Future asset opportunities
- » Personal values
- » Interests & hobbies
- » Professional, religious, or other affiliations
- » Philanthropy & causes
- » Personality characteristics
- » Social & family connections
- » Type of relationship

Then, highlight or circle characteristics that appear across a majority of the clients listed.



Name

Profession/Employer

Age AUM

Notes

Name

Profession/Employer

Age AUM

Notes

Name

Profession/Employer

Age AUM

Notes

Name

Profession/Employer

Age AUM

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Notes

Create Ideal Client Profile

Identify the traits of an ideal client based on your personal preferences and common traits of your favorite clients.

Demographics

Interests & Characteristics



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