



GET TO KNOW YOUR IDEAL CLIENT

EVALUATE & DOCUMENT YOUR IDEAL CLIENT PROFILE

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. If you want to kick it up a notch, connect your hose to a pressure washer.

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 2 sections:

1. **Evaluate the Fit:** Evaluating the clients that are a good fit for your business by thinking about actual clients that you serve
2. **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 @ bpoole@convergo.co.

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EVALUATE THE FIT

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

COMPANY 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.

WHO ARE THE KEY CONTACTS

Who is involved in buying decisions?

NAME/POSITION	WHAT THEY LIKE ABOUT WHAT YOU DO FOR THEM

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DOCUMENT YOUR IDEAL CLIENT PROFILE

Follow along in [the accompanying deck](#) to help guide you through filling out the profile.

DESCRIPTION	
Descriptive words from the Values Worksheet Based on what you just wrote down above, how would you describe your Ideal Client to create a profile?	

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	

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 .

If you'd like to read more about ideal clients, check out [this blog](#) on the power of having the right list and [this blog](#) on 3 simple filters to help you narrow your focus.

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