



Ideal Client Checklist



Trying To Find Ideal Clients?

Use This Checklist to Get Started!

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Create a profile of your ideal client is all about looking for these key characteristics:

- What they need
- What they value
- Where they hang out (online and in real life)

Outlining these attributes and behaviors focuses your attention on who will be high-value clients and how to reach them.

The super simple checklist below will help you pinpoint the audience attributes and demographics that will generate projects you love . . . and that generate profit.



1. Start With What You Have

The best place to start with your client profile is to take a hard look at the people right under your nose (your current clients, or past employers). Which qualities make some of these individuals “model clients?”

Knowing what you want more of, and also what you *don't* want more of, are vital insights to keep in mind at all times.

a. Calculate which clients are the most profitable

Which industries do these clients work in? Which kinds of business/revenue models do they use?

b. Get real about which of your clients you most enjoy working with

Whose calls do you look forward to and why?

Especially consider this point if many of these clients are not your most profitable. What does this tell you?

c. Know your “deal-breakers?”

What are the reasons you've fired clients before? And what qualities do you want to avoid in the future?

Remember, it's not always about professionalism and personality. Sometimes a client can be “great to work with” but still not a good fit for your business because they need work that you don't enjoy doing or that isn't profitable for you.

2. Draw a picture of your favorite clients

1. Which kinds of industries do these clients work in?
2. What size companies are they? How many people do they employ?
3. How much revenue do they generate in a year?
4. How old do they tend to be (particularly the people you interface with)?
5. Where are they based geographically?
6. What is the "mood" of their brand? (think about the lifestyle associated with it)
7. How do they present themselves/dress?
8. Where do they like to spend their time?
9. Where are they present online? Where can you engage them?
10. What kinds of leisure activities, hobbies and passions do they have?
11. What kinds of products and services appeal to them?
12. What are their biggest fears, goals and most immediate needs?
13. As collaborators what are their greatest strengths and weaknesses?

3. Boil it down to the basics

In a few sentences describe the attributes you've listed. Are there some common threads you now see, even across industries, that might better inform your client selection? Also make a list of the 5 biggest overlapping traits of your best clients.

4. Fine-tune it

If your current clients are not your most profitable or have some “deal-breaker” traits, what could be different about them or more like your current most profitable clients to make them better for your business?

- Do you just need to take on more of them?
- Do you need to charge them more?
- Do you need to change the way you're charging them?
- Do you need to put your focus on a different industry?
- Do you need to focus on a different part of the creative work that you offer?
- Do you need to watch for certain signals up front that will indicate that they have deal-breaker qualities?

5. Pursue your ideal clients!

With a clearer picture of the client you most want to work with, start looking at your marketing and outreach to ensure you speak specifically to their needs.

Do you have some thoughts about growing businesses for freelancers, consultants and solopreneurs?

[We'd love to hear from you.](#)



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