

A smiling woman in a business suit is seated at a table, with a white coffee cup and a glass of water in front of her. The background is a blurred office setting. The text 'IDEAL CLIENT' is overlaid in large, bold, teal letters.

# IDEAL CLIENT

**WORKBOOK**

**AVLIER**

# INTRODUCTION

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Think about one of your worst clients – someone who frustrates you and waste your time.

Now, think about one of your best clients – someone you truly enjoy working with.

What would life be like if all of your clients were similar to your best clients?

With proper positioning and branding you can start attracting the right clients to your business. The first step in that process is defining who your ideal client is. But, we're not just talking about their age, where they live, and income level. We're also talking about the challenges they're facing, why they may be hesitant to hire you, and which of your services will help them the most.

This workbook will walk you through the questions you need to ask yourself (and be able to answer) if you want to define your ideal client.

Once you've answered all of the questions you'll have a better understanding of who your ideal client is, and how you can communicate with them.

To start, think about one of your best clients and fill out the information below. This way you can refer back to this client when going through the questions.

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Name

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How long have they been a client?

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What makes them an ideal client?

# DEMOGRAPHICS

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Age range (keep it within a 5 year range)

Highest level of education

Household income

What are their primary sources of income?

What industry do they work in?

What is their job title?

City & State

Neighborhood

# PSYCHOGRAPHICS

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What is their day to day life like?

What are their goals for this year?

What is the biggest goal they have right now?

What's preventing them from accomplishing their goals?

What is their biggest worry right now (life or business)?

What challenges are they trying to overcome (as it relates to your services)?

What's the consequences if they can't overcome their challenges?

# CLIENT AVERSIONS

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What has their past experience been with a CPA?

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What have they tried in the past to solve their challenges?

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What worked? Why?

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What didn't work? Why?

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As a business what are your weak spots?

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What information do they not know about you, but they should?

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# IDEAL SERVICES

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What are the top 3 services you offer that would help them the most?

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Which of your services are they already utilizing?

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If you had to pick just one service to offer this client what would it be?

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Why?

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**AVLIER**