

Defining Your Avatar

Identifying Your Ideal Client

PART ONE:

Who are the Top 20% of your customers?

What is their value to your firm?

How much revenue do they bring in?

How many referrals do they make to your firm?

What are the Common Characteristics of your Top 20% Customer?

Financial Make-Up

Age / Family Status

Vocation / Industry

Residential Location

Asset Mix

Attitude Toward Money

Goals, Aspirations, and Dreams

What is your relationship with these customers?

Close, personal friends

Acquaintance

Transactional

What financial products or services do you provide to this group of customers?

Common characteristics of their buying habits?

Do you find working with this group of customers enjoyable?

What do you like about them?

What do they like about you?

How did you connect with these Top 20% customers?

Seminar

Lead Program

Referral

Other

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PART TWO: Refining Your Ideal Prospect. Getting Close To Your Customer

What does your customer experience look like?

Why do your customers refer you?

If they don't, why not?

What do your customers say about your brand, without being coached by you?

What do your customers say about your competition?

Where in the customer experience do you encourage referrals?

Is this part of your sales process?

Is it impromptu?

Do you share your "Ideal Client" criteria with them?

Do you reward them for referrals?

PART THREE: The Buyer's Journey & Their Experience, Wants, & Needs

When I buy or use your product or service, I'm _____.

What I don't expect from your product or service is _____.

What I'm talking about in my life right now is _____.

What I really need right now is _____.

What I want is _____.

What I really want is _____.