Ideal Client
Summary

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Ideal Client Summary

Objective

To increase revenues exponentially by discovering the demographics and characteristics which comprise an **Ideal Client** for your company and, in doing so, targeting new prospects which meet the same criteria.

Process

1. Share the List

You share a list of 10-20 of your top clients from the last few years selected using metrics such as:

- they made you a lot of money
- they were easy to partner with
- they paid on time
- their projects were long and deep, or short and easy
- you sold a lot of products and services
- etc.

2. Make the Calls

Include the company name, phone number, and contact person for each client and I will make the calls. I ask them a brief set of demographic questions as well as two key additional questions:

- what do they like most about working with your company?
- assuming there is always room for improvement, what do they like least?

3. Track the Responses

I track all responses in an Excel document verbatim and then highlight the repeated words and phrases to deliver the final summary that identifies and collates the patterns.

Findings

What they like most becomes the exact verbiage used in successful sales and marketing campaigns going forward. Those exact phrases and words attract more of the same kind of client and should be used on your website, in your newsletter, in social media venues, and everywhere else your brand is broadcast.

What they like least becomes your areas for improvement and how to overcome objections before your prospects even have them. For example: if a client says the project took three months but the punch list took six, you tell new prospects up front that you guarantee your punch list is complete within 30 days, so they don't even have the objection.

The **demographic breakdown** easily reveals patterns you can use to target companies in different sectors with matching demographics.

Next Steps

The summary report will be your information to implement on your own; or I am happy to do appointment setting to feed the sales pipeline.

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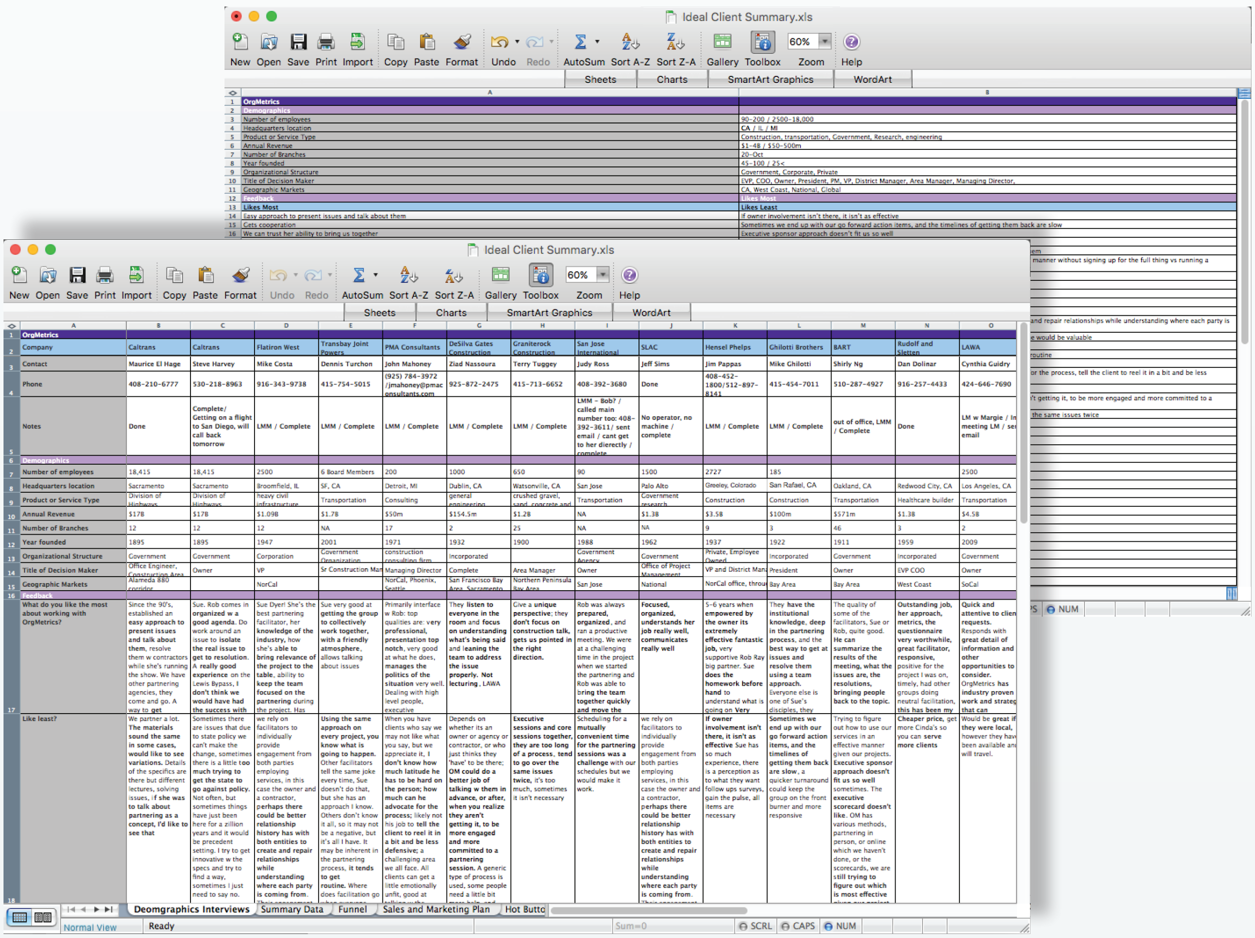
Sample Data

The resulting spreadsheet is yours to keep and use. It includes a tab showing the results of the demographic interviews, and a summary tab which highlights the characteristics of your Ideal Client. We'll use the demographic info and match it with growing sectors, so you solicit new prospects who are spending money. We'll also use the results to create the desired balance between: small clients, bread and butter clients, and large juicy clients. Some companies want a lot more of one than another; you make the decision, I make a game plan that gets the results.



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Feeding the Sales Funnel

Each Ideal Client Summary presentation includes a sample sales funnel based on a simple approach to ensure no prospect falls through the cracks. You can import this sales funnel weekly or monthly into your CRM or use it perpetually on its own. It consists of three levels:

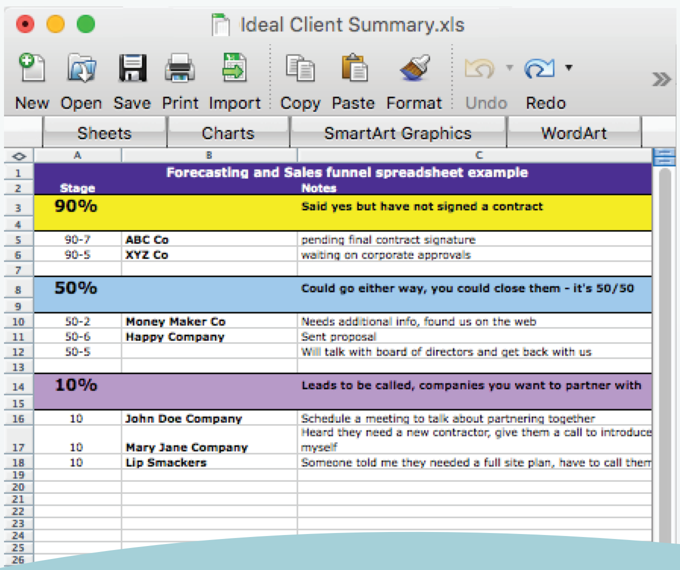
10%—add to this section any prospect you want to work with; all it means is, there is a 10% chance you will close some of them.

50%—any prospect that doesn't say 'no' after you approach them, moves to the 50% section. They may have asked you to call them back, send them info, or to speak with someone else on their team, anyone that doesn't say 'no', gets moved to 50% because now there is a 50/50 chance you will close them. It doesn't mean they are 50% of the way through your sales process, it just means they didn't say 'no', so the odds are raised to 50/50.

90%—anyone who says, 'yes, I'll meet with you,' or 'yes, you can submit a proposal,' or 'yes, I'll listen to what you have to say,' they move to 90%. Now you have a hot prospect who wants to hear what you have to say.

Each time you work on your sales funnel, you start by following-up with those in the 90% section, those who have self-qualified with your product or service and want to hear more—always focusing on being their expert and answering their questions. The beauty of a 90/50/10 funnel is, you can clearly see how many have to be placed in the 10% section to have one move up through the funnel to 50%, and then 90%, and then on to becoming a new client!

Put the effort into serving each prospect, not on selling them. Serving is the new selling. Be their expert, answers their questions. If you have the product or service they want to buy, they will sell themselves. It's easier than you think.



	A	B	C
1	Forecasting and Sales funnel spreadsheet example		
2	Stage		Notes
3	90%		Said yes but have not signed a contract
4			
5	90-7	ABC Co	pending final contract signature
6	90-5	XYZ Co	waiting on corporate approvals
7			
8	50%		Could go either way, you could close them - it's 50/50
9			
10	50-2	Money Maker Co	Needs additional info, found us on the web
11	50-6	Happy Company	Sent proposal
12	50-5		Will talk with board of directors and get back with us
13			
14	10%		Leads to be called, companies you want to partner with
15			
16	10	John Doe Company	Schedule a meeting to talk about partnering together
17	10	Mary Jane Company	Heard they need a new contractor, give them a call to introduce myself
18	10	Lip Smackers	Someone told me they needed a full site plan, have to call them
19			
20			
21			
22			
23			
24			
25			
26			

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Tracking Your Sales Process

This funnel will also track where you are in the sales process so you always know what the next step is to take with a prospect. There are 8 basic stages in a sales cycle, your process may have more, or less, let's figure it out and set you and your team up for real success, measurable ROI, and a tracking funnel that ensures no one falls through the cracks.

STAGE 1 - INTRODUCTION

STAGE 2 - STATEMENT OF BENEFITS

STAGE 3 - QUALIFYING / FACT FINDING

STAGE 4 - AGREEMENT ON NEEDS

STAGE 5 - PRESENTATION

STAGE 6 - AGREEMENT

STAGE 7 - COMMITMENT

STAGE 8 - FOLLOW THROUGH