

Your Quality Client

Who is a quality client for your firm? That person goes beyond the traditional demographics regarding age, marital status, education and geography.

Psychographics are super-targeted. This is where you hone in on the qualities and characteristics to determine who's best-suited for your firm.

If you're unsure where to start, then think about your favorite client as you answer these questions.

- 1. Why does this person initially reach out to you?** This could be to resolve a problem or to achieve a specific result.

2. **How financially savvy is your client?** How much does your client understand business finances? Does your client want better insights into his/her business? Will the financials be considered when making business decisions?

3. **Consider your client's personality.** Hint: Your best clients are either similar to you or the opposite of you.

4. **Identify how your client processes information.**
 - a. Dominant learning styles are auditory, visual, written and kinesthetic (action takers).

 - b. Now consider decisiveness. Does your client make quick decisions or need to first process the information?

 - c. Your best client naturally gravitates toward one of these qualities. Fact finder, follow through, quick start or implementor. This is based on the Kolbe A Index.

5. What does your client value? Consider what's meaningful to your client. Do you know your clients likes and dislikes?

6. What's meaningful to your client beyond work? Consider how your client's success would improve his/her lifestyle. What would your client be able to do once success is achieved that isn't possible right now?

7. Is your client involved in the community or sits on a board?

8. Communication is key.

- a. Communication preference? Phone, email or text
- b. Does your client prefer a high-level explanation or detailed response?
- c. How often does your client want updates?
- d. How often does your client want to meet with you?
- e. How does this client show respect for you and your staff?

9. Clarify your clients' numbers.

- a. Average revenue
- b. Industry
- c. Number of employees
- d. Income
- e. Phase of business i.e. start-up, growth, mature, exit
- f. Years in business
- g. Other:

