

CLIENT CLASSIFICATION

Your Ideal Client

According to our **AAA** approach, ideal clients have three characteristics in common: they offer the appropriate level of **Assets**, they have the right **Attitude**, and they are **Advocates** for you.

A

The first A in this approach speaks to assets (or income generated from those assets).

What asset level (or income generation) and range of needs must your clients have for them to be considered a good fit for your areas of experience?

AA

The second A refers to attitude, which, over the lifetime of your working relationship, is actually more important than assets.

- What is their attitude towards you?
- Do they focus on what you cost or what you are worth?
- What is their attitude about empowerment?
- Do they treat you like a personal CFO, or do they insist on having investments with other Financial Consultants?
- Do they have an informed attitude about the way the markets work?
- Do they try to micromanage you?
- Are they disrespectful to your staff?

Keep in mind, assets change but attitudes rarely do. Many times we see a consultant work with a client with great assets and a bad attitude. In the long run, this client winds up costing the consultant more than it earns them.

AAA

The third A stands for advocacy. Your top clients will frequently recommend your services. Ideal clients appreciate the merit of “buying into” a relationship with a professional consultant rather than simply “buying” things from a salesperson. They are extremely loyal and they feel they are doing a like-minded friend a disservice by not introducing them to you.

A client who meets your criteria for all three categories is an ideal client; someone who is an absolute joy to work with and who recommends your services to anyone who will listen.

These criteria make up your ideal client profile.

