


WORKBOOK

Ideal Client Discovery

Discover the Most Suitable Prospects for Your Services



Ideal Client Discovery - Result and Benefits

FOCUS STAGE		
MILESTONE	RESULT	BENEFIT
 Ideal Client Persona	Pinpoints the most receptive audience for your services, enabling precise marketing.	You will feel a renewed sense of focus and direction, knowing your efforts are aligned with the needs of those most likely to value and be able to afford your services.

Ideal Client Discovery - Introduction

Defining your ideal client is an extremely essential step in the process for attracting better clients to your business - and retaining them as clients.

Your ideal clients are the individuals that inspire and energise you to do your very best work.

These clients are the exact opposite of the type of clients that fill you with frustration, stress and anxiety. I want you to spend every working day with clients who are ideal for you and your business.

This workbook will help you identify which of your existing (or past) clients qualify as ideal clients and help you work out how to attract more clients just like them.

Then it's time to build your first Ideal Client Persona*.

You can use Xtensio's free persona creator or create your own using something like Microsoft Word or Photoshop.

**You will definitely have several types of ideal client but let's start with your most valuable and profitable one first.*

Ideal Client Discovery - What is an Ideal Client Persona?

An Ideal Client Persona (ICP) is a detailed description of who your target customer is.

The description looks at all you need to know to be able to market what you've got on offer to your ideal client.

It looks a lot like an online dating profile.

It includes some personal details, as well as info on inspiration, problems, fears objections and wildest dreams.

The image shows a template for a 'User Persona Name' with a purple header. It includes a placeholder for a profile picture, a section for a 'quotation that captures this user's mindset', and a box for personal details such as Age (1-100), Work (Job Title), Family (Married, kids, etc.), Location (City, State), and Character (Archetype). There are also sections for Personality (with scales for Introvert/Extrovert, Thinking/Feeling, Sensing/Intuition, Judging/Perceiving), Goals (with four trait buttons), Frustrations, Bio, Motivation (with a bar chart for Incentive, Fear, Growth, Power, Social), Brands & Influencers (with three placeholder icons), and Preferred Channels (with a bar chart for Traditional Ads, Online & Social Media, Referral, Guerilla Efforts & PR). A footer note says 'Remember - you may modify this template, remove any of the modules or add new ones for your own purpose.'

Ideal Client Discovery - Why Use an Ideal Client Persona?

One of the most pivotal elements in creating a successful marketing strategy, especially for services requiring significant financial investment, is understanding who your ideal client is.

Here's why crafting a detailed client persona is crucial:

Tailored Messaging: When you understand your client's aspirations, challenges, and needs, you can craft messages that resonate deeply with them. Speaking directly to them makes your marketing feel personalised and relevant.

Focused Efforts: Marketing budgets are never infinite. By understanding who your ideal client is, you can ensure that every penny you spend is geared towards reaching and influencing them.

Product Development: Knowing your client persona can also guide the evolution of your product or service. When you understand what they truly want, you can align your offerings to meet those needs more precisely.

Building Trust: Services requiring a hefty financial commitment often mean that trust is a major factor in the purchase decision. By understanding and speaking directly to your client's deeper concerns, you foster trust and position your business as a partner, not just a vendor.

Ideal Client Discovery - Going Beyond Demographics

Now, while it's tempting to stop at basic demographics (like age, gender, location, and income level), these barely scratch the surface.

That's where psychographics* come in.

Beyond the Basics: While demographics tell you 'who' your customer is, psychographics tells you 'why' they buy. This dives into their attitudes, values, interests, and lifestyles.

Emotional Connection: Humans are driven by emotion. By understanding the psychographics of your client, you can appeal to their emotions, making your marketing campaigns much more powerful.

Predicting Behaviour: Psychographics can give insights into how a potential client might behave in the future, based on their beliefs and interests. This is invaluable for creating a long-term marketing strategy.

Staying Relevant: In a fast-changing world, businesses must stay relevant. By constantly updating your understanding of your client's psychographics, you can evolve with them and ensure your marketing always hits the mark.

**Psychographics refers to the study and classification of people based on their attitudes, aspirations, interests, and other psychological criteria, often used in market research to complement demographic data.*

Ideal Client Discovery - **What Do You Sell?**

Explain What You Do In A Simplified Way	Does What You Sell Have A Branded Name?	Does What You Sell Have A Specific Fulfilment Process?
How Much Is What You Sell?	Is It Considered Expensive?	Which End Of The Market Is Your Service Positioned?

Ideal Client Discovery - Who Are You Selling to?

List all the different types of clients/customers that you sell to	List your top 5 clients
Are there differences these types of clients/customers?	What are there common characteristics?

Ideal Client Discovery - **Fears, Frustrations, Needs and Goals**

List your ideal clients fears (Personal)	List your ideal clients frustrations (Professional)
List your ideal clients needs (Personal)	List your ideal clients goals (Professional)

Ideal Client Discovery - Brainstorming Answers

Inspiration and Inspiration	Frustration and Fears	Needs and Goals
<p>What books do they read?</p> <p>Favourite magazines, music, TV shows</p> <p>What do they Google (list everything related to your business)?</p> <p>What blogs or websites do they frequent?</p> <p>What are their favourite apps?</p> <p>What social media channels do they use?</p> <p>What conferences or events do they go to?</p> <p>What do they do on Sunday mornings?</p> <p>What are their guilty pleasures?</p> <p>What influencers do they follow?</p> <p>Where is their dream holiday destination?</p> <p>Who do they model or idolise?</p> <p>What brands are they loyal to?</p>	<p>What worries keep them up all night?</p> <p>What triggers fear for them?</p> <p>What challenges do they face on a daily, weekly, monthly, yearly basis?</p> <p>What are their pain points?</p> <p>What do they fear might fail in their life if their situation continues or gets worse?</p> <p>What do they really want that they don't have now?</p> <p>What's stopping them from getting what they want?</p> <p>What have they tried that didn't work for them?</p> <p>What objections might they have about investing in your product/service?</p>	<p>What do they secretly wish for?</p> <p>What do they really, really want?</p> <p>What's the OMFG dream solution they'd pay almost anything for?</p> <p>If their dream solution was to magically appear, what specific benefits are they looking for?</p> <p>How would it make them feel?</p> <p>What would be the Paracetamol to their pain?</p> <p>What will their friends and family think of them if their situation is fixed in an ideal way?</p> <p>What will they be able to do or achieve if their fantasy situation becomes a reality?</p>

Ideal Client Discovery - Brainstorming Answers

Inspiration and Inspiration	Frustration and Fears	Needs and Goals

Ideal Client Discovery - Create Your Ideal Client Persona

Now that you're inside your ideal client's head, maybe use what you've uncovered to write up your ideal client persona.

Xtensio has a pretty little drag-and-drop persona creator.

It's free too.

Drag and drop modules into place. Add all your ideal client's info and pick a suitable photo (hint: do a quick google search).

The screenshot shows the Xtensio User Persona Name template interface. At the top, there is a purple header with the text "User Persona Name". Below the header, there is a grey silhouette of a person's head and shoulders. To the right of the silhouette are four purple buttons labeled "Trait 1", "Trait 2", "Trait 3", and "Trait 4". Below the silhouette is a text box containing the placeholder text: "A quotation that captures this user's mindset." Below the text box is a box containing demographic information: "Age: 1-100", "Work: Job Title", "Family: Married, kids, etc.", "Location: City, State", and "Character: Archetype". Below the demographic information is a "Personality" section with a grid of sliders for Introvert/Extrovert, Thinking/Feeling, Sensing/Intuition, and Judging/Perceiving. To the right of the personality section is a "Bio" section with a text box and a note: "Remember - you may modify this template, remove any of the modules or add new ones for your own purpose." To the right of the bio section is a "Motivation" section with five horizontal sliders for Incentive, Fear, Growth, Power, and Social. Below the motivation section is a "Brands & Influencers" section with three folder icons labeled "Xtensio". Below the brands section is a "Preferred Channels" section with five horizontal sliders for Traditional Ads, Online & Social Media, Referral, and Guerilla Efforts & PR.

Ideal Client Discovery - How to Use Your Ideal Client Persona

Here's is how your ideal client persona will be utilised and why we delve deeper than just surface-level information:

Personalised Messaging: With a clear persona, our marketing messages are tailored. It's like speaking directly to someone, addressing their aspirations and concerns. This establishes a personal connection, making them feel understood and valued.

Efficient Resource Allocation: Knowing precisely who we're targeting allows us to channel our marketing resources effectively. Instead of casting a wide net, we use a precise focus, ensuring that our efforts are streamlined and impactful.

Content Creation: Whether it's blog posts, videos, or webinars, understanding our ideal client means we produce content that truly resonates. They see themselves in the scenarios we depict and the solutions we offer.

While demographics offer us a sketch, psychographics fill in the colours.

It's the difference between knowing someone's age and understanding what gets them out of bed every morning.

For a service requiring a significant financial commitment, this deep understanding is not just beneficial, it's crucial, to attracting and converting ideal prospects into ideal clients.