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HOW TO CREATE AN IDEAL CLIENT PROFILE

FOCUS ON YOUR MOST PROFITABLE & VALUABLE CLIENTS

INTRODUCTION

FIND YOUR BEST CLIENT

Most agencies try to be all things to all clients, even as they push their clients into defining their brand, emphasizing their points of differentiation, and developing a strong point of view.

They know that defining who your brand is -- and more importantly -- who it is not is essential for building brand awareness and equity.

But they often fail to do this for themselves.

One of the steps in understanding and living your agency's positioning is to define your ideal client profile. By creating this document, you can create more targeted marketing materials, prospect for new clients in a purposeful way, and better serve the clients who are the best fit for your agency.

This also saves your agency owner and new business reps time. According to MarketingProfs, 61% of B2B marketers send all leads directly to sales, while only 27% of those leads are actually qualified.

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There's a better, more efficient approach that will allow you to recognize and focus on the clients that actually are profitable and valuable to your agency.

CHAPTER ONE

COMMON MISTAKES TO AVOID

The main goal of creating this document is to form a better understanding of what your best client looks like: What is their budget? What industries do they work in? What type of marketing do they want? How do they work with your agency? With this information, you can create materials and messaging that will attract and educate this valuable partner.

But it's not easy. It can be difficult to separate what types of clients you want with the reality of what type of client your agency is *best* suited to provide services for. To prevent you from falling victim to the more common traps, review the following common mistakes.

5 Mistakes Made When Creating a Client Profile

1) Creating a “Wish” Client

An ideal client needs to be firmly based on your current “best” clients. You may wish all your clients spend $10 million on marketing per year, but unless that is truly reflective of who is actually using your services, you should leave it out.

If your positioning is strong, you should be attracting clients who fit with your specialty, services, style of delivery, cost, and culture. If you don’t have those clients yet, you may want to reconsider your services, your processes, how you market your agency, and how you hire -- all in order to bring your positioning strategy to life.

2) Limiting Your Ideal Client

It can be easy to want your ideal client to resemble an actual client -- down to the number of cats she has and how many revisions she makes on a landing page design.

That’s not the point though. The ideal client profile should be a broad description of your ideal client base while also limiting the world from anyone who needs any type of marketing.

The client profile should more accurately reflect the attitudes, behaviors, motivators, and preferences of a collection of individuals, rather than be a true-to-life snapshot of the one person you would like to work with.

Try starting with one profile, and as you grow and segment the business, add additional profiles.

3) Creating Too Many Personas

Your clients are more alike than you think. They have similar problems, they are measured on the same core metrics, they makes decisions in a similar way, and they have the same objections.

You want to be specific and detailed, but some differentiators are simply trivial. If you can't easily name your personas and outline key details for each one, you might have invited to many people to the persona party.

4) Claiming That You Are the Hero

Marketing and sales is complicated. Organizations are complicated. Change is very complicated. Oftentimes, your firm will be up against some ingrained ideas and 20-year-old processes that can make it difficult to take risks, try out new things, or even just execute on simple marketing tactics.

You can't fix everything. Most likely, the marketing and even sales enablement tools you produce for the company can only go so far, especially if the client has objections to implementing new processes or if the client's marketing and sales team are misaligned.

When creating your ideal client profile, be sure to identify only the specific pain points that your firm solves for. These should be targeted solutions that prove the high value of your firm.

5) Relying on Your Team to Define Your Ideal Client

You new business reps, account managers, strategists, and consultants are taking to your clients every day, so they must know them the best. You interview your team, and use these anecdotal stories to create your ideal client profile.

While you should talk with your team and gather insight from them, you also need to mine the data and conduct formal interviews with current and past clients to understand what their buying process looked like. People can become biased over time, and by simply asking your team for information, you are including perceptions formed during a relationship in your profile.

You can collect some of this information through landing page forms and onboarding documents, which could help cut down on the amount of time needed to conduct the interviews.

CHAPTER TWO

THE BENEFITS OF CREATING AN IDEAL CLIENT PROFILE

It’s easy to think that you’ve got the perfect services, pricing, and team. So naturally, the perfect clients will just find you. And if a few other less-than-ideal ones seek you out as well, that’s OK.

This is how your **clients become the ones who define your agency** -- leaving you directionless and less than profitable when they move on to another agency partner.

A ideal client profile created from in-depth research and influenced by your positioning strategy will allow your agency to be more attractive in business pitches -- regardless of geographic region -- bring on more profitable clients, retain them for longer, and reduce your competitive market.

With a defined target audience, you can create marketing campaigns, programs, and materials that resonate more strongly with prospects and current clients.

5 Benefits for Defining an Ideal Client Profile

Once you complete your ideal client profile(s), you'll be able to use these marketing activities in a more informed and relevant way:

Personalization

If you specialize in different service lines or industries, you can use personalization based on client profiles to customize your website to that group's specific needs.

A report from Venture Beat found that 70% to 94% of marketers have seen increases in key site performance indicators such as sales by employing personalization.

Content Creation & Mapping

Once you know your ideal client profiles, you can create content that will engage those prospects and clients -- whether this is a blog post, ebook, or sales enablement tool.

You can then align your content by ideal client profile and lifecycle stage or where in the buying journey the prospect is. You'll want to write and package content differently depending on if the potential client is simply getting to know your agency, has been in contact with your business development team, or has a proposal sitting on her desk.

Segmentation

Personalized emails improve click-through rates by 14% and conversions by 10%, and they drive 18 times more revenue than broadcast emails. With distinct idea client profiles, you can segment your list and create campaigns that align with their buying process. You can also use these lists to segment by prospects and current clients, so you can market either new services or additional service lines. You could also create email drip campaigns based on if you have had an initial meeting with the client or if the client has been sent a proposal to future the relationship.

Keyword Research

Once you know how your ideal clients are searching and the language they use, you can create targeted articles that will be indexed by search engines and found by prospects during their search process. This could also help you to identify a target list of publications you want to guest blog for and potential partners you could advertise with.

Sales Process

By understanding how your ideal client makes decisions, what sources they ask for recommendations, how they find an agency partner, and the average sales cycle for each type, you can mold your sales process to your prospects. This will help you to better understand when a proposal is actually necessary, what type of nurturing campaigns you should set up, what information the prospect needs and when, and how often you should communicate with the potential client.

CHAPTER THREE

HOW TO CREATE AN IDEAL CLIENT PROFILE

An ideal client profile should be based on interviews and research from your current and past clients, prospects, and your staff. The end result is that you create a fictional character whom embodies your best client, but the information and data needs to be based in reality.

To create your profile(s), start by following these steps:

1) Make a List of Your Best Clients

To find your five or 10 best customers, consider these questions:

- What are your most profitable accounts?
- Which clients have been with your agency within the range of or past your average client lifespan?
- Which clients signed on with your agency within or below the normal sales cycle range?
- Does the client delay projects, or do they provide feedback promptly and clearly?
- Does the client pay within your acceptable collection period?
- Do you like working with the client?
- Is the work fulfilling?
- Does the client provide positive and constructive feedback?
- Do you provide a high ROI delivering the services requested by the client?

You could also dig into your analytics data -- from Google analytics, your marketing automation platform, or CRM -- to see if you can align website behavior to your current "best" clients, such as how submissions on a landing page align with a job titles or which roles consume which type of content.

2) Conduct Client Interviews

These interviews should help you gather both qualitative and quantitative information that will balance out your information and help you create useful client profiles. Ideally, doing these in-person will provide you with the best information, but you could also use a survey tool to gather this data.

Here's an extensive list of questions you can ask to extract the information you need for the eight main categories. Feel free to remove or add additional questions based on what is most important to your agency.

DECISION MAKER INFORMATION

- What is your role?
- How long have you been at the company? How long were you employed at your previous role?
- What skills are required to do your job?
- What tools do you use in your job?
- Who do you report to? Who reports to you?
- What does a typical day look like?
- What people in your company make decisions about selecting a marketing agency or technology vendor?

COMPANY DATA

- In which industry or industries does your company work?
- What is the size of your company (revenue, employees)?
- Where are you located?
- What is your marketing budget per year?
- What percentage of this is used on outside resources -- agencies, vendors, freelancers?
- How many in-house marketers do you employ?
- What does your sales cycle look like?

GOALS & CHALLENGES

- What are your job responsibilities and priorities?
- How is your job measured?
- What does it mean to be successful in your role?
- What are your biggest challenges? important successes?

INFORMATION SEARCH PROCESS

- What sites and publications do you frequently visit to learn new information for your job?
- What associations or groups do you belong to? What conferences do you attend?
- What social networks do you use and how do you use them?
- How do you begin the search for a new agency? Do you search for a company on Google? If so, what keywords do you use? Do you use an agency search firm or an online database?

IDENTIFIERS

- How do you handle conflict?
- Do you like to work independently or in a group?
- What style of communication works best for you?

OBJECTIONS

- Why is it difficult to work with an agency? Why would you want to bring the work in-house?
- During the sales process, what points about our firm made you hesitant to work with us?
- Where did you turn to find out information about our agency from other sources?

PURCHASING DECISIONS

- Why did you decide to work with our agency?
- Why have you stayed with use for X years?
- What did the decision process look like for your team?
- How are we unique from other agencies you have worked with?
- What are three important qualities you look for in an agency?

3) Compile the Information & Create Your Profiles

When you're done, you will take this information and create a profile that outlines the ideal client's:

1. Background
2. Demographics
3. Personality/communication style
4. Goals
5. Challenges and how the agency can address these challenges
6. Objections
7. Purchasing process
8. Agency's fit or elevator pitch to this specific segment

You should create both a detailed, in-depth profile for review by your marketing team, sales team, account managers, strategists, etc. You could also create a shorter, more visual version to make it easy to remember and identify your ideal client.

CONCLUSION

FOCUS ON ATTRACTING THE RIGHT TYPE OF CLIENT

Your ideal client profiles should guide your agency's marketing efforts, new business outreach, and current client account growth. You can could use this information to develop blog posts and content offers that align with your different client types, create sales enablement tools for your sales reps that outline common objections and responses, and segment your current clients and prospects for more targeted communication and marketing.

This document will help you to speak the language of your best clients, showing that you understand their specific problems and are the right partner to solve these issues.

All this will help you to be more relevant to your most valuable clients and more aware of the detrimental affects on your agency's staff and your bottom line of working with the wrong clients.

CREDITS

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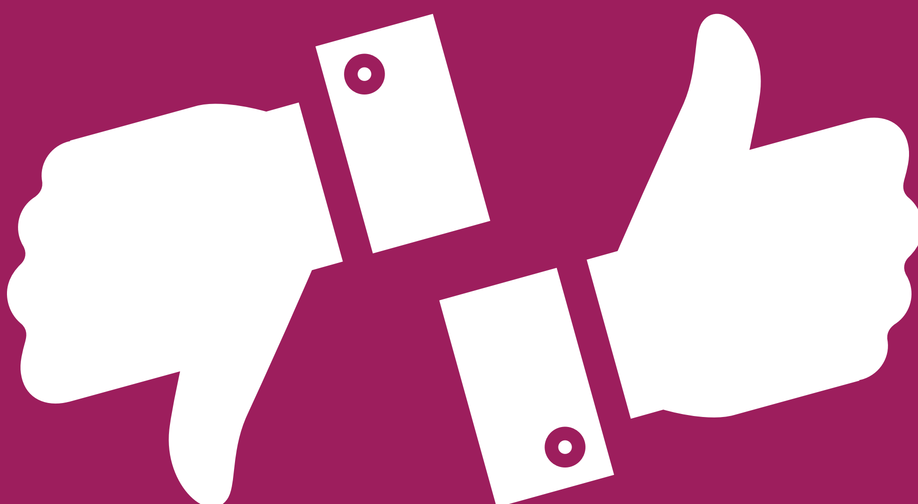

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