

Business Breakthrough

YOUR CREATIVE VALUE BLUEPRINT TO GET PAID WHAT YOU'RE WORTH



GAIL DOBY, ASID

THE IDEAL CLIENT DOSSIER

WORKSHEET

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When you know who you do and don't want to work with, you're more likely to attract the right clients and make more money. The key is to define your client so well that you know exactly how this person looks. You can even come up with a name for your client(s). This worksheet will help you create marketing materials that attract this client profile.

You will need to do as many profiles as you have market niches.

IDEAL CLIENT DEMOGRAPHICS			
Age Range	Male <input type="checkbox"/> Yes <input type="checkbox"/> No	Female <input type="checkbox"/> Yes <input type="checkbox"/> No	Date Profile Created
Married <input type="checkbox"/> Yes <input type="checkbox"/> No	Single <input type="checkbox"/> Yes <input type="checkbox"/> No	Divorced <input type="checkbox"/> Yes <input type="checkbox"/> No	Children <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Maybe Ages: _____
Income Level		Net Worth (Assets - \$ Owned)	
Price Range of Home		Own More Than One Home <input type="checkbox"/> Yes <input type="checkbox"/> No	
Neighborhoods Desired			
Educational Level(s) Achieved			
Profession(s)			
Level Within Company (CEO, Manager, etc.)			
Profession(s) to Avoid (Engineer, Attorney, Doctor, Etc.)			
Is Their Design Budget Paid by Savings or Credit?			
What Is Your Preferred Budget Range?			
COMMERCIAL OR INSTITUTIONAL CLIENTS			
Business Type(s)			
Business Type(s) to Avoid			
Annual Revenue of Business		Industries	
Number of Employees		Years in Business	
<input type="checkbox"/> Retail <input type="checkbox"/> Restaurant <input type="checkbox"/> Bar <input type="checkbox"/> School <input type="checkbox"/> Large Office <input type="checkbox"/> Professional Office			
<input type="checkbox"/> Medical <input type="checkbox"/> Hospital <input type="checkbox"/> Hospitality <input type="checkbox"/> Other			

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PSYCHOGRAPHICS & RELATIONSHIP PREFERENCES	
Interests	
Hobbies	
Preferred Travel Destinations	
Community Involvement	
Preferred Brands (BMW, Gucci, Tiffany, Starbucks, etc.)	
What Car(s) Do They Drive	
Where Do They Shop	
Political Affiliation	
Religious Affiliation	
Health & Fitness Level & Activities	
How Interested Are They In The Arts?	
Collectors of What? Art, Antiques, etc.	
Continuing Education Interests	
Do They Use Personal Advisors, Assistants or Services?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If so, what types (Certified Financial Planner, Private Banker, CPA, Tax Attorney, Personal Shopper, Butler, Private Chef, Nanny, Personal Trainer, Nutritionist, Plastic Surgeons, Massage Therapist, Spa, etc.)	
Personality Traits Preferred	
Personality Traits To Avoid	
How Do They Spend Their Leisure Time?	
What Motivates Them?	
What Are Their Fears?	
What Are Their Passions?	

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What Do They Dislike?	
What Are Their Aspirations?	
What Adjectives Would You Use To Describe Them?	
Are They Interested In Fashion?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do They Like To Shop	<input type="checkbox"/> Yes <input type="checkbox"/> No
Who Makes The Financial Decisions?	
How Do They Handle Conflict?	
Why Do They Want To Hire A Designer?	
What Do They Expect Of A Relationship With A Designer?	
TECHNOGRAPHICS	
How Comfortable Are They With Technology?	
DO THEY...	
Shop Online (Amazon, Zulilly, One Kings Lane, Etc.)? <input type="checkbox"/> Yes <input type="checkbox"/> No Which Sites?	Which ones:
Make Their Own Travel Arrangements Online? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Read Online Magazines? <input type="checkbox"/> Yes <input type="checkbox"/> No	Which ones:
Read Blogs? <input type="checkbox"/> Yes <input type="checkbox"/> No	Which ones:
Communication Preferences (Prioritize 1 – 7 Most to Least Preferred) <input type="checkbox"/> Email <input type="checkbox"/> Text <input type="checkbox"/> In Person Meetings <input type="checkbox"/> Physical Mail <input type="checkbox"/> Cell Phone <input type="checkbox"/> Home Phone <input type="checkbox"/> Office Phone	
Watch videos? <input type="checkbox"/> Yes <input type="checkbox"/> No	Which ones:
Listen to podcasts? <input type="checkbox"/> Yes <input type="checkbox"/> No	Which ones:
Read eBooks? <input type="checkbox"/> Yes <input type="checkbox"/> No	Which ones:
Use Review Sites Like Yelp or Angie's List? <input type="checkbox"/> Yes <input type="checkbox"/> No	Which ones:
What Websites Do They Regularly Visit?	

