



Practice Advancement Program

Execution Workshop

The Ideal CLIENTS

Workshop Description

Collect the characteristics of your ideal clients into a profile that encompasses niche, target market, personality, and leadership styles, and most importantly, aligns with your vision. Score each of your current clients using your ideal profile and develop a plan to curate your base to perfection.

Achieving the ideal client base is one thing but maintaining that level of ideal takes intention and dedication. By actively working a maintenance plan, you will establish an ideal client base that aligns with your vision, provides the revenue you desire and fosters a vibrant team culture.

Syllabus

Session One – Defining Your Ideal Client Profile

- Exploring the characteristics of your ideal client
- Clarifying the target market, hard and soft attributes of your ideal client

Session Two – Evaluating Your Current Client Base Using Your Ideal Client Profile

- Rating clients based on your ideal client profile
- Identifying clients that need to be phased out of the practice, coached toward change and/or upsold to higher services

Session Three – Create Transition Strategies to eliminate non-ideal clients while retaining and nurturing ideal clients

- Creating a transition plan to offboard non-ideal clients
- Creating a professional development plan to add new services and fill in your team's knowledge gaps

Session Four – Guard Your Front Door

- Velvet Rope: Defending Your Ideal Client Profile at the Front Door
- Effective Vetting Techniques
- Effective Discovery Techniques
- Pricing the Engagement / Protecting the Value
- Contractual Agreements (Length & Purpose)

*PREREQUISITES: This workshop is available to Advantage and Premium members who have completed the 4-week Ideal Practice Part 1 Course. While not required, we strongly recommend attending the Ideal You and Ideal Services workshops prior to participating in the Ideal Client workshop.