

Ideal Client Worksheet

Business Attributes:

What Industry or industries does this client work in? (Could be more than one.)

Describe some of the key business attributes (e.g., company size, types of products/services sold, markets served, are they in growth mode? Is it a new venture?):

Preferred location/region: _____

Client Attributes:

Their position or title: _____

Gender and age range: _____

How does this person view you and what you bring to the table? What's their perception of VAs?

Have they worked with a VA in the past? If so, why did they end the relationship? Or, if they're still working with a VA, will you be part of a VA team for this client?

How good of a communicator is he/she? How do they prefer to communicate with you?

How easy is it to work with him/her? _____

What specific type of work would this client hire for? How would these responsibilities grow over time—and how rapidly (if at all)?

How many hours per month or week do I work for this client? _____

How big a part does this client want me to play in their business? In other words, am I considered purely administrative support? A true business partner? Somewhere in between? (Be specific here.)

How price-sensitive is he/she? _____

Describe their level of sophistication with regard to business in general, online tools, social media, etc.

Other important attributes (e.g., How driven and passionate are they? What are their core values? What are they driven by? What's their long-term vision?)

Measuring Prospects Against Your Ideal Client Profile

Having a clear picture of your ideal client doesn't mean you turn down every prospect that doesn't meet your exact criteria. Assuming a prospect has at least met a minimum threshold, you should qualify them based on a number of factors. These can include:

- The added prestige to be gained from working with this client (if any)
- The desirability of the work they need help with
- Where you currently are in your VA career
- How much capacity you currently have
- Their expected turnaround time on projects (if applicable)
- The perceived difficulty of working with the client
- Whether or not the client is willing to pay your rates
- The client's apparent ability to pay on time
- How difficult it may be to secure the business
- How badly you need the work

What other factors are important when evaluating potential prospects for your business?

Your Ideal Client "Persona"

Take some time to create a detailed description of your "imaginary ideal prospect." Make your description come alive by giving him/her a name and describing in full detail the world they work in. This description should be half a page to a full page in length in MS Word.