

Building Your 'A' Client Profile

Review your top 5 or 10 current clients and then (using the below examples as prompts) build your own 'A' client profile and goldilocks state description.

'A' Client Profile (Demographics) Prompt	'A' Client (Goldilocks State) Prompt
<p>Multiple shareholders/ Trustees (easy accessible) Been in business 5 years plus 25 Staff plus Service/Manufacturing Industry Within 1.5 hrs drive Comfortable with multiple 'contact points' within your firm Capable of affording \$24k + for 'renewable work' Open to 'Strategic' involvement and development from you Aged between 35 and 55 – Gender/Race not relevant. Other</p>	<p>Knowledge: Aware of the liabilities facing directors and understands the need for formalised governance procedures to support everyday business decisions. Skill: Can read a set of accounts in terms of combining statements of performance & position to gain a clear understanding of where the business stands. Resource: Has sufficient capital & cashflow to afford to develop the business in terms of both transactional capacity and service capabilities. Environment: External business environment is competitive yet active. Internal environment is facing a need for improvement but shows signs of employee engagement. Attitude: Business owner is motivated to self improve as part of the business improvement process; upper management are developing in this regard also.</p>
Your 'A' Target Profile (Who challenges you to be at your best?)	Your 'A' Client Goldilocks State (What must be present for you to do your best work?)