

IDEAL CLIENT PROFILE

By Gail Doby, ASID



DESIGN
SUCCESS

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Ideal Client Profile Worksheet

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 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 ____ to ____	Male Yes <input type="checkbox"/> No <input type="checkbox"/>	Female Yes <input type="checkbox"/> No <input type="checkbox"/>		Date Profile Created
Married Yes <input type="checkbox"/> No <input type="checkbox"/>	Single Yes <input type="checkbox"/> No <input type="checkbox"/>	Divorced Yes <input type="checkbox"/> No <input type="checkbox"/>	Alternative Relationship Yes <input type="checkbox"/> No <input type="checkbox"/>	Cohabiting Yes <input type="checkbox"/> No <input type="checkbox"/>
Children	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Maybe <input type="checkbox"/>	Ages
Income Level		Net Worth (Assets - \$ Owned)		
Price Range of Home		Own More Than One Home	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Neighborhoods Desired				
Educational Level(s) Achieved				
Profession(s)				
Level Within Company (CEO, Manager, etc.)				
Profession(s) to Avoid				
Nouveau Riche		Yes <input type="checkbox"/>	No <input type="checkbox"/>	Maybe <input type="checkbox"/>
Old Money		Yes <input type="checkbox"/>	No <input type="checkbox"/>	Maybe <input type="checkbox"/>
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		
Corporation <input type="checkbox"/>	LLC <input type="checkbox"/>	Sole Proprietorship <input type="checkbox"/>	Partnership <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	
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?	Yes <input type="checkbox"/> No <input type="checkbox"/>
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?	
What Are Their Aspirations?	

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What is Person One's Communication Modality (Neuro Linguistic Programming - NLP)?	Auditory <input type="checkbox"/> Visual <input type="checkbox"/> Kinesthetic <input type="checkbox"/>
What is Person Two's Communication Modality (NLP)?	Auditory <input type="checkbox"/> Visual <input type="checkbox"/> Kinesthetic <input type="checkbox"/>
What Do They Dislike?	
What Adjectives Would You Use To Describe Them?	
Are They Interested In Fashion?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do They Like To Shop	Yes <input type="checkbox"/> No <input type="checkbox"/>
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 Use (Which Sites - List In Blanks)	
Smart Phone - iPhone or equivalent? Yes <input type="checkbox"/> No <input type="checkbox"/>	iPad Or Equivalent? Yes <input type="checkbox"/> No <input type="checkbox"/>
Text Messaging? Yes <input type="checkbox"/> No <input type="checkbox"/>	
Social Media? Yes <input type="checkbox"/> No <input type="checkbox"/>	If Yes, How Often And For What Purpose?
Use the computer? Yes <input type="checkbox"/> No <input type="checkbox"/>	How Often And For What Purpose?
Use Digital Camera? Yes <input type="checkbox"/> No <input type="checkbox"/>	
Shop Online (Amazon, Zulilly, One Kings Lane, Etc.)? Yes <input type="checkbox"/> No <input type="checkbox"/> Which Sites?	
Make Their Own Travel Arrangements Online? Yes <input type="checkbox"/> No <input type="checkbox"/>	
Read Online Magazines? Yes <input type="checkbox"/> No <input type="checkbox"/>	Which Ones?
Read Blogs? Yes <input type="checkbox"/> No <input type="checkbox"/>	
Communication Preferences (Prioritize 1 - 4 Most to Least Preferred) Email ____ Text ____ In Person Meetings ____ Physical Mail ____	

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Watch videos? Yes <input type="checkbox"/> No <input type="checkbox"/>	Listen to podcasts? Yes <input type="checkbox"/> No <input type="checkbox"/>
Read eBooks? Yes <input type="checkbox"/> No <input type="checkbox"/>	
Write A Blog? Yes <input type="checkbox"/> No <input type="checkbox"/>	Topic Of Blog?
Use Review Sites Like Yelp or Angie's List? Yes <input type="checkbox"/> No <input type="checkbox"/>	Which Ones?
What Websites Do They Regularly Visit?	
Notes	