Ideal Client Implementation Scorecard.

Defining an ideal client profile and building your experience, marketing, processes, and team with them in mind can provide valuable benefits to your firm and clients. Rate how strongly you agree or disagree with the following statements to identify opportunity in your firm.

RANK YOUR FIRM'S SEGMENTATION VIA IDEAL CLIENT		CURRENT SCORE	IDEAL SCORE
		0-5, 5, I strongly agree	
Client Experience	We understand the needs of our clients, based on experience and research, can reasonably predict their future challenges and have aligned our firm to meet the needs of our clients creating stronger relationships.		
Competitive Advantage	By understanding our ideal clients, we can better market our services creating a competitive advantage over more generalist financial advisory firms.		
Business Analytics	We maximize revenue based on repeatable processes, limited one-off projects, targeted marketing, identified growth engines, pricing and profitably analysis.		
Staffing and resources	Our staff understands our ideal clients needs and how we service them. Our technology stack complements our offering by making us more efficient and client focused.		