



Ideal Client Checklist

Use this checklist to help identify and screen the perfect client for your practice



Step #1: Create a profile of your ideal client

| | |
|--|----------------|
| List your 3 most valuable clients | 1. 2. 3. |
| What makes them valuable? (e.g.) Buy multiple services, refer new business, pay on time | |
| Do these clients share a common industry? (e.g.) transportation, medical | |
| Why do you enjoy working with these clients? | |
| How did you acquire these clients? | |

Your answers above should create a basic profile for an ideal client. Now, use the checklist below to refine your ideal client profile. You can apply the checklist against new or existing clients.



Step #2: Screen clients with these questions

Ask yourself—does the client...?

- | | | |
|--|---|--|
| <input type="checkbox"/> Trust my advice | <input type="checkbox"/> Have an interest in my value-added services | <input type="checkbox"/> Participate in social media |
| <input type="checkbox"/> Have a budget for my services | <input type="checkbox"/> Provide feedback about my services | <input type="checkbox"/> Have a strong business network |
| <input type="checkbox"/> Respect my time | <input type="checkbox"/> Send me required files or answers in a timely manner | <input type="checkbox"/> Have a history of working successfully with an accountant or bookkeeper |
| <input type="checkbox"/> Run a complex business requiring my professional advice | <input type="checkbox"/> Embrace cloud technology | <input type="checkbox"/> Seem easy to work with |
| <input type="checkbox"/> Pay on time | <input type="checkbox"/> Want a long-term relationship | <input type="checkbox"/> Want to work with me |
| <input type="checkbox"/> Respond to emails or calls | | |
| <input type="checkbox"/> Want to learn | | |

The right-fit client for your firm

Use your internal responses to decide whether or not you will take on a prospective client or retire an existing account. By screening for ideal clients, you can eliminate the stressful ones to develop a practice that is both healthy and profitable.

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