

# Ideal Client Profile Worksheet

## GOALS OF THE WORKSHEET

- Save time, increase your win rate and maximise your return by creating an ideal client profile
- Knowing what your ideal customer and ideal project looks like will simplify screening inquiries and qualifying leads

## FILL OUT THE WORKSHEET

### Ideal Client Demographics:

Understanding who your ideal client is and where they are located will help you identify promising projects at a glance.

- **Where is your ideal client located?**  
*What areas do you want to work in? How far do you want to travel?*
- **What is the ideal age range you want to work with?**  
*Do you want to work with clients who are younger or more mature?*
- **Does your ideal client have a family or are they single?**  
*Do you prefer working for clients with individual or multiple decision makers?*
- **Based on your project cost, what would the ideal household income level be?**  
*How much income is needed to afford the type of projects you want to work on?*

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### Project Logistics:

Knowing what your ideal project is and at what stage you want to be involved will help you determine if future opportunities are the right fit for your business.

- **What types of projects do you want to work on most?**  
*Which projects best fit the direction you want to take your business? What kinds of projects do you want to add to your portfolio?*
- **What timeline works best for your projects?**  
*Is there a certain timeline you like to follow for your projects? Are there certain seasons or months that you prefer to work during? What is your current pipeline and how might new projects fit into it?*
- **What is your ideal project budget?**  
*Given your average project costs, do you have a minimum budget you're willing to work with?*

## Working Style & Motivations:

Every project requires some level of collaboration. What does your ideal partner look like and what are their motivations for this project?

- **How engaged is your ideal client?**  
*Do you prefer to work with clients who are hands on or hands off? How involved does your client need to be for a successful project?*
- **What is your ideal client looking to achieve through this project?**  
*Are the reasons behind the project important to you? Do you want to work with clients who are emotionally invested or approach the project from a more practical standpoint?*
- **Is it important to work with clients who already understand your style?**  
*How much time do you want to spend educating a potential client about your work? Would you rather work with someone who has done their research and knows what they want?*

## Additional Notes