

STEP 1: REVEAL YOUR IDEAL



PERSONAL BRANDING

“At the end of the day, making connections with other people has everything to do with what you share in common. You would do well to actually observe YOURSELF as a vital part of this process.”



Define your ideal client

A clear definition of your ideal client is the first and most vital milestone in developing an effective personal brand. In fact, the success of your entire marketing strategy depends on your ability to accurately sum up the qualities of your ideal.

The power of niche marketing

This worksheet teaches you the basics of niche marketing, i.e., defining a specific target so that you can concentrate your marketing efforts into specialized actions that increase your odds of success.

When asked to outline the characteristics of their ideal client, many advisors will answer with something like, “has money to invest,” “pays me for my time,” or “takes my advice.” Of course your ideal client will have money to invest—that should be a given! Challenge yourself to think beyond these superficial qualities as you define your ideal. Let’s get started.

1. Narrow your focus:

Begin by defining the traits that make working with a client either enjoyable and productive or a nightmare.

Think about existing clients that you love working with. **On a blank sheet of paper**, list specific traits that resonate with you.

Next, think about clients you can’t stand working with and list all the reasons why.

2. Define yourself:

Next, think about your own personal traits. What makes you unique and connects you to the clients you enjoy? Consider the factors at right. Write your characteristics below the list you created in Exercise 1 above.

- What life stage are you in?

- What was your previous career/industry?

- What are you up to in your free time? What are your hobbies?

- If you asked your best client why they love working with you, how would they answer?

- What is the greatest strength you bring to your practice?

- What is your ultimate dream?

- What is your proudest accomplishment?

- Who are your real-life heroes?



Be sure to view the companion video, “Reveal Your Ideal” before working on this worksheet.

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Guess what? It is possible that your ideal client does not exist in your current client base—and that is okay!

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