



Execution Workshop

Defining the Ideal CLIENT

Workshop Description

With your Vision, Mission and Purpose Statements written and your Ideal Services identified and priced, defining your Ideal Client Profile is likely the most important and pivotal step in your practice advancement journey. Woodard's Ideal Client 4-week execution workshop steps you through creating your Ideal Client Profile, analyzing your existing clients against this profile, and creating transition and nurture plans to maximize the "idealness" of your client base.

Syllabus

- 1) Week 1: Defining your Ideal Client Profile
 - a. Exploring the characteristics of your ideal client
 - b. Target market, hard attributes, and soft attributes
- 2) Week 2: Evaluate your current client base against your Ideal Client Profile
 - a. The Ideal
 - b. The Marginal
 - c. The Non-ideal
- 3) Week 3: Create transition plans for each type of client
 - a. Nurture your Ideal Clients to elongate their engagement lifespan
 - b. Identify how to transition your marginal clients into ideal clients
 - c. Create a plan to off-board your non-ideal clients and calculate their replacement value.
- 4) Week 4: Guard your front door
 - a. Assess your marketing effectiveness for attracting Ideal Clients
 - b. Tweak and adjust your prospect sources to minimize your "no" time and maximize your "yes" time.