

PREDICTIVE
ROI

How to Create Your Client Avatar

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What is an Avatar?

“Avatars” aren’t just tall, blue aliens. Instead, an avatar is a detailed outline of your ideal client. Some people call them “personas”, or other names, but what you call it doesn’t matter. The goal is to describe your dream client so you know who you should be selling — and equally if not more important — who you should avoid.

So what makes your ideal clients tick? What keeps them up at night? How will you gain their trust? What do they hope tomorrow brings for them and their business? These are tough questions, but answering them, helps ensure you’re focusing on the best leads possible.

It may not seem like a terrible thing to have a poor fit client now and then, but oftentimes a poor fit client costs you money, erodes your team, and adds unneeded stress to your business. In extreme cases, they can even put you out of business.

There are four main criteria you need to understand in order to narrow down who is a great potential client because your ideal client is someone that fits you financially, and personally. After all...sales calls with people who can’t purchase, can’t use, or don’t want your services or products are a waste of time.

The Four Criteria

Here is how you figure that out:

1. **Financial:** Do they have the ability to afford your services or products? Do you offer them a big ROI?
2. **Situational:** Does your product or service solve a problem they are currently facing? Is this person able to make or heavily influence a purchase decision?
3. **Conditional:** Are these people who are easy to work with, excited by what you have to offer, and willing to change in order to take advantage of your service or product to its fullest?
4. **Emotional:** Are they coachable and not impossible to please? Do they have the natural skills, inclinations, perseverance, etc that is needed to do well with your product or service? Are they emotionally mature and stable? Are they interested in win-win situations or win-lose situations? What keeps them up at night? How will you gain their trust? What do they hope tomorrow brings?

Choose Current Ideal Clients

The 4 criteria listed on the last page are simply tools, but you need a dataset to use the tools on. The best way to do this is by assessing three to five of your current best clients. If you don't have any clients, use your gut and be ready to revisit this exercise in the future.

Look at all the customers you serve right now that:

1. You love to work with.
2. You are able to serve really well.
3. They love to work with you.
4. They are able to afford you.
5. They are profitable to your business.

When selecting these customers, also try to avoid picking a customer that is still in the honeymoon phase with you because they just started with you. That honeymoon phase is different for every company, but you shouldn't be basing your decisions off of business relationships that are too new.

Ok, you have those clients pick out? Perfect, now let's move forward to the next step.



Breaking The 4 Criteria Apart

The 4 criteria listed earlier are great, but not surprisingly, they are an oversimplification. Each of those criteria contains a lot of different traits you need to think about. And some of those traits fill more than one criteria. So here is a deeper dive into some traits you will want to think about...

Traits To Think About

You will need about 90 minutes for this exercise. Start by having your 3-5 ideal customers written down in front of you. Call a meeting with your leadership team if you have one, and members of your team who work directly with these clients on a day-to-day basis.

Now get ready to ask a simple question repeatedly. “What traits do my current ideal customers share?”

Don't settle for surface answers.

If you haven't asked the question “What other traits do my current ideal customers share?” at least a dozen times, you probably aren't digging deep enough.

If you are stuck, insert the trait name below into the question. For example: “What other personality traits do my current ideal customers share?” or “What other communication traits do my current ideal customers share?”. If anyone needs clarity about that trait, they are listed below to add clarity. Keep in mind, this is not an exhaustive list, but it is comprehensive.

On the next page there are different traits. You should likely have **at least 1-2 things in each trait** by the end of this exercise. More is great if you get them, but don't leave any blank.

Traits

Personality Traits: These are “soft” traits. They are a little more intangible such as being grateful, easy going, driven, or some other description of a personality trait. Be careful not to make these contradictory or too specific.

Communication Traits: All of us have experienced good and bad communication in our lives. In business, communication is often a make-or-break trait. This can be which medium they prefer like phone vs email. And this can be communication style such as direct vs passive.

Physical Traits: Gender and age are really the most common here, but there may be other traits that fit for your business.

Financial Traits: This is about the concrete numbers of how your ideal client operates financially. Can they afford you? What is the lifetime value of a customer for them? What financial benefit if any can you provide?

Traits

Emotional Intelligence Traits: This often entails one's ability to deal with the unexpected or bad situations with grace. Keeping things in perspective, taking responsibility, scapegoating, and other traits fit in this area.

- **Special note:** Emotions are also part of your sales process, so we are calling out some special questions here worth exploring. What drives them emotionally to make a decision to spend money with you?

Fear Traits: We all have things that hold us back or keep us from making a decision. Some fears, we as individuals and companies are able to overcome due to experience or inherent traits in our services or products. Other fears are roadblocks for us we can't help solve and makes us not a great fit for some clients. What keeps them up at night? What does failure look like to them? What holds them back from making a decision?

Hope Traits: This is what a client is striving for, both professionally and personally. Who do they want to impress? What does the world look like to them in an ideal world? How do they envision your products or services working to help them? How will you gain and keep their trust? What do they hope tomorrow brings?

Traits

Industry Traits: Some companies have a narrow focus, others are more broad, but most companies shouldn't try to focus on more than 3 industries. You can serve other industries, but don't focus on them. What industry(s) do you want to focus on? Why those industries?

Company Traits: Company size, revenue, age, values, focus, etc. This is where you get to drill down into the type of company you can help the best. The type of company that would be crazy not to work with you. The type of company you would be crazy not to go after.

Decision-Making Traits: The ability to make decisions can be critical, and who makes those decisions can be critical. This is true both for your ability to sell to these companies, and your ability to help these companies. Is the person you are talking to able to make the decision emotionally? What about institutionally/organizationally?

Cleaning Up Your List

By the time you are reading this, we hope you have a good long list of traits you have identified as commonalities amongst your best clients.

Go through them and make sure nothing is duplicated. Simplify them into categories if it helps you.

Then organize these traits as either a Need (my clients need to have this trait going forward or I won't work with them) or a Want (I want future clients to have this trait if possible).

Your list of “needs” should be much shorter than your “wants”.

Need

1. _____
2. _____
3. _____

Want

1. _____
2. _____
3. _____
4. _____
5. _____

Actually Using The Avatar

Now you have a functional Avatar. A full list of things to aim for when it comes to client acquisition including your Needs and Wants across the 4 Criteria we know to be invaluable to assessing a client. But how do you use it?

- 1) Assess your current clients...Do you have a current client that is a bad fit? Do they frustrate your team? Cost you money? Treat you badly? Etc. It may be time to make a decision about what you can do to change them, or get rid of them as a client.
- 2) Assess your leads in the sales process...Are there some that fit your ideals? Put more effort into those! Are there some who are a bad fit? Maybe refocus your efforts into other, better leads. Or focus on finding different leads.
- 3) Keep using it...Follow the above two steps going forward. Just that easy.

One important note, **DON'T DISMISS A CURRENT OR POTENTIAL CLIENT BECAUSE THEY DIDN'T FIT ALL THE CRITERIA AND TRAITS!!!**

No one is perfect to work with, not even you. Your Avatar should guide you to better decisions, but it shouldn't be so strict no one measures up.

Happy Selling!



PREDICTIVE ROI

Putting this into practice can and will help make your business more systematic, repeatable, and measurable.

Please let me know how this course made a difference for you and your business – or – if you have any questions or concerns.

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