

Diana's Ideal Client Profile Template

Coming up with your ideal client profile is one of the most overlooked steps in the marketing process for freelancers. I strongly recommend you work out a profile for the businesses you want to work with but also, the people within those companies with whom you want to work with or the very least, to whom you'd reach out for collaboration and who are most likely to interview you.

The Business Client Profile

Demographic Checklist

- Company size _____
- Location of headquarters _____
- Types of products and services they provide _____
- Annual revenue _____
- Number, size and location of branches _____
- Year founded _____

Psychographic Checklist

- Market leader _____
- Innovative or cutting-edge _____
- Liberal or Conservative _____
- Environment-friendly _____
- Employee/family-friendly _____
- Fast growing/adopting new ideas _____
- Stable/set in their ways _____

What growth stage is the company in? (start-up, growth, stable or decline)

What is the type of workforce they employ?

What is the company's culture?

What is the management style?

What trade associations do they belong to?

What publications do they subscribe to?

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The Personal Client Profile

Demographic Checklist

- Age _____
- Gender _____
- Profession _____
- Education level _____
- Household income level _____
- Marital status _____
- Geographic location _____

Psychographic Checklist

- Conservative or Liberal _____
- Conformist _____
- Environment-friendly _____
- Socially conscious _____
- Power-wielding _____
- Fun-loving _____
- Cutting-edge _____
- Trend follower _____
- Fashion-forward _____
- Family-oriented _____

How many family members are typically in your customers' households?

What hobbies and/or sports do your customers enjoy?

What types of entertainment do they like? (movies, theater, opera, etc.)

What publications do they subscribe to?

How else do they enjoy spending their free time?

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Rank the order of importance of the following criteria to your ideal client:

	Very Important	Somewhat Important	Not Important
Price			
Quality of products or services			
Brand name recognition			
Customer service			
Broad array of services			
Friendly staff attitude			
Discounts and sales			
Attractiveness of packaging			
Location			
Appearance			
Convenience of product/service use			
Guarantees/Warranties			
Technical Assistance			
Flexible payment terms			

An important note –

Once you fill in the information in the template, write down a one- or two-paragraph description for each ideal client profile to easily refer to it on a regular basis.

Also, know that your ideal client profile is not set in stone. You can have more than one ideal client, if you please, and their profiles can and *should* evolve as you grow as a freelancer, and as your goals or preferences change with time.