

How to identify your ideal client

Thank you for watching my video on getting and keeping the right clients for your bookkeeping business. Remember in video 1 we said that a mistake too many bookkeepers make is to take on anyone, often for low fees, sorting out a mess, getting involved in low value tasks and struggling to get on top of things. Here is your checklist to help you identify your ideal client.

The 5 characteristics you want in an ideal client	Notes
Type of business (Sector, stage, location etc.)	
Owner (Gender, age etc.)	
Size of business (Sole trader, 5+ employees, Turnover)	
Personality of owner/manager (Friendly, outgoing, sociable)	
Interests of owner/manager (Is this someone I'll enjoy working with?)	

Add some colour, are they.....	
Married or single	
Children and dependents	
Where do they live?	
What car do they drive?	
What books do they read?	
What is their favourite restaurant?	

Write a description of your ideal client