



# The Ideal Client **CONVERSATION STARTER**





## Part 2: Conversations With Existing Clients

Letting your clients know you are committed to protecting and empowering their very best and most powerful characteristics is a conversation that never ends. Acknowledging the characteristics essential to their success and maintaining a successful relationship with you, is a great way to get it started.

In every subsequent conversation, look for opportunities to refer to these characteristics. For example, when you develop or discover a new method to help them achieve their goals, identify the characteristics it protects and empowers before introducing it.

Here is a sample script: “Jim, because you are so passionate about ensuring your children are self-sufficient and achieve their full potential, I think you may find it very valuable to look at these estate planning innovations I have been studying.”

By including their characteristics in these types of conversations, you will be able to create a higher degree of relevance for the strategies, tools, services and advice you provide.

### Action Planner

A good way to become comfortable with engaging clients in The Ideal Client Conversation is to fold it into your normal client interactions. To help you prepare, complete the following planning worksheet.

Client	Date of planned interaction	Characteristics to acknowledge



## Part 3: Conversations With Prospective Clients

### Including your ideal client description in your conversations with prospective clients:

1. Encourages prospects to self-select. They will know if they are qualified to be your client.
2. Enables the best prospects to recognize themselves in your description of who you help (what's in the relationship for them).
3. Engages their curiosity. Their thoughts turn from, "Is this person worth my time?" to "Do I fit in with this person's best clients?"
4. Holds prospective clients accountable to behave in accordance with the characteristics you and they acknowledge are vital to their success and a successful relationship with you. (e.g.: Doesn't waste time, does what they say they will, appreciates the value of other people's expertise, knows they can't do everything themselves, willing to give their trust to those that earn it, decisive, good delegators, always looking to learn new ways to improve themselves and their businesses...)

### A good way to become comfortable with using The Ideal Client Conversation is to fold it into your very first conversations with prospective clients. Here is a sample script:

Prospective Client: "What do you do?"

Advisor: *"I work with entrepreneurial minded business owners."*

PC: "Oh, what do you do for them?"

A: *"My best clients are always looking for new ways to grow their businesses and at the same time achieve greater personal security and independence for themselves and their families."*

PC: "So, you help them do that?"

A: *"Well, because they all know their time is a limited resource, part of my job is to free up their time so they can focus on what matters most."*

PC: "I see. What does matter most to your clients?"

A: *"While they are passionate about the success of their businesses, they are also very concerned with making sure they are able to enjoy all of the opportunities it can afford them, their families and even their employees and the communities in which they live."*

PC: "Hmm... well I always think of myself as an entrepreneur and my business is doing OK. What can you do to help me?"

A: *"I'm not sure. But, I do know that if you can spend a little bit of time with me, we both can find out if it makes sense in going forward. Would you like to sit down now and talk, or perhaps we can get together next week for half an hour... which do you prefer?"*



# The Ideal Client CONVERSATION STARTER

## Part 3: Conversations With Prospective Clients

### Action Planner

The preceding sample script is obviously skewed to reinforcing the value of including your ideal client description in a first conversation. In real life conversations, you will almost always feel compelled to give a more direct answer to any “What do you do?” type of question. Don’t! Stick to your guns because what matters most at this point in the conversation is for you to disqualify prospects. As counter intuitive as this may sound, the more successful you become, the more important it is for you to realize and act on the fact that what you do is not for everyone. The more you can tell the world that what you do is only for a select number of people who have a specific set of characteristics, the more successful you will become.

To begin taking advantage of your ideal client description with prospects, complete this worksheet.

Prospect	“Ideal” Rating (Poor/Unknown/Excellent)	Action (Disengage/More Discovery/Engage)



## Conversations With Referral Sources

*(If you haven't already done so, consider completing The DKE Referral Jump-Start.)*

Sharing your ideal client description with active or potential sources of referrals, gives them something very substantial to work with. They know you are not just looking for anyone who can fog a mirror and has a bit of money to invest. Instead, they are armed with the realization you are exceptional at helping people who possess a very specific set of characteristics.

Here is a sample script illustrating how to share your ideal client description with referral sources while giving them a reason for taking action.

“Lately, I have been doing a lot of work on my business. I have been looking for ways to improve the systems and process I use and for new ways to bring more value to my clients. While doing so, I realized I create the most value and best results for a very specific type of person. And, as you can guess, these people almost always become my very best clients.

This realization led me to develop an ideal client description which I would like to share with you. My ideal clients are people who... (insert description)

Because of the increased clarity about what works best in my business and who I am able to help the most, I have been able to free up a significant amount of time to do two things:

1. Bring more value to my current clients
2. Bring on a handful of new clients

I thought you would be interested in these developments and was wondering if you can think of anyone who possesses the same characteristics as my ideal clients.”

To bring your ideal client description into your conversations with sources of referrals, complete this worksheet.

Referral Source	Next Conversation Date/time	Desired Results & Past Results to Acknowledge

### WHAT'S NEXT?

*If you would like help getting engaged in The Ideal Client Conversation.*  
[Click here](#) to send your completed worksheet to us or call (941) 485-8220  
to arrange a time to speak with one of our senior team members.