

## CHOOSING THE BEST CLIENTS FOR ADVISORY SERVICES

When integrating client advisory services into your practice, selecting the right clients can be crucial for your success. By identifying your ideal client persona and understanding their needs and preferences, you can tailor your services to meet their specific requirements. You can provide an extraordinary client experience that sets you apart from competitors.

Defining your client base helps to build your message, services, sales and support around attracting and serving a targeted group. You can also market, sell, and serve a specific target customer, then focus on what problem your firm solves. This in turn helps to focus your brand, allowing you to market yourself to a specific audience, making it easier for best-fit, high-quality clients to find you. Now, you can deliver value to these clients and pose the following questions: *Who can you deliver the greatest value to, and what problems can you solve through your services?*

By targeting your ideal clients, you can enhance profitability while delivering exceptional service throughout the client journey.

### QUALITIES OF THE

## Ideal Advisory Client



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By focusing on attracting those who align well with your business model, you increase the likelihood of building long-lasting relationships based on mutual trust and success.



**PAUL SAVAGE**

Director of Client Success