
GET TO KNOW YOUR
**IDEAL
CLIENT**

CALCULATE THE VALUE OF YOUR IDEAL CLIENTS

REALIZING LIFETIME VALUE WORKSHEET

Overview

One way to grow your business faster is to attract and cross-sell ideal clients. These are the types of clients that appreciate what you do and can buy everything that you sell. Because these clients are buying your whole spread of products/services, it takes fewer clients to hit your revenue goals.

Unless you have a limitless marketing budget and massive sales team, trying to sell to everyone is a recipe for failure. Both your message and efforts get diluted, lost in a vast ocean of noise. Plus, you end up wasting a lot of time talking to prospects who really don't value what you do.

The more you focus your marketing and sales efforts around ideal clients, the faster you can grow your business.

In this worksheet, we will help guide you through the process of estimating and predicting the value of an Ideal Client over 10 years. This can help you determine how many clients you need to be able to hit your revenue goals. The process has 3 sections:

1. Document financial goals & estimating what your clients bring to your business
2. Calculate the 10-year revenue potential of an Ideal Client
3. Reflect

If you need help filling out this worksheet, please reach out to Bill Poole @ bpoole@convergo.co.



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VALUE PER CLIENT

Use this page to document your financial goals and estimate what your clients bring to your business.

What is your 3-Year Revenue Goal \$_____

Write down your current revenue per client (Total Annual Revenue/# of Clients) \$_____

Estimate the 10-year revenue value of a client that is an ideal fit for your business: \$_____



IDEAL CLIENT PROFILE WORKSHEET

10-YEAR VALUE

Use this worksheet to estimate the 10-year value of an ideal client. This is a rough estimate to give you an idea of the potential of an “all-in” ideal client that buys everything you offer. [Check out an example.](#)

PRODUCT/SERVICE	QUANTITY	REVENUE POTENTIAL	10-YEAR REVENUE POTENTIAL
TOTAL 10-YEAR REVENUE POTENTIAL PER IDEAL CLIENT			
ANNUAL REVENUE POTENTIAL PER IDEAL CLIENT			
CURRENT ANNUAL REVENUE PER CLIENT			

REFLECTION QUESTIONS

How close was your estimate?

How many 100% Sold Ideal Clients would it take to hit your 3-year goal?

What other insights did you gain as a result of this exercise?

If you'd like to read more about ideal clients, check out [this blog](#) on the power of having the right list and [this blog](#) on 3 simple filters to help you narrow your focus.

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