Sweet Spot
Client Filter
All clients are not created equal

Finding your perfect match. That’s what this tool is all about. If you’ve been in the agency business for more than a week, you know there are clients we love and clients who suck the life out of your agency. The better you know yourself, the better you will be at identifying and chasing after those sweet spot clients that you love to work for, your team is excited to bust a hump to please and in return, the client appreciates all of your efforts.

Ideally, you’re going to stop chasing or even talking to the prospects that don’t meet your profile of the ideal client. Remember – you don’t need 100 new clients so there’s no reason to compromise on this issue. It’s worth the effort to define your best fit clients and only expend your energy trying to win the prospects who fit that mold. We all do better work for clients who are a better fit.

The good news is – you’ve experienced that more than once in your agency’s history. We’re going to use that experience to replicate those great clients.

Let’s define your version of perfection

If I said to you – if you could clone any client and work for that clone as well – which client would you choose? If I said to you, you can clone any three clients – which three would you choose? Let’s see what those clients have in common. Answer the following questions about each client and then we’ll compare the lists.
Cloneable client #1:

**Tangibles:**

Client title: _________________________________

Client age: ________________  Client gender __________________  Client’s years of experience: ________________

Annual budget: ________________________________

Industry: ________________________________

Company size: _____________________________  # of locations: ________________________________

Company ownership structure: ________________________________

☑ B-to-B  or  ☐ B-to-C

Types of work done for client: ________________________________

________________________________________________

________________________________________________

________________________________________________

Internal structure of marketing department: ________________________________

________________________________________________

________________________________________________

Profit margin of the work (you can approximate): ________________________________

________________________________________________

Client’s level of marketing sophistication: ________________________________

________________________________________________

Did the agency have access to the C-Suite? ☐ Yes ☐ No

Decision making process on the client side: ________________________________

________________________________________________

Client company’s experience level with agencies: ________________________________

________________________________________________

Budget process (did you create it together, were you given a number, etc): ________________________________

________________________________________________

Client company’s position in the marketplace (leader, underdog, start up, newcomer, etc.): ________________________________

________________________________________________

Were you their only agency? ☐ Yes ☐ No

Longevity of the relationship: ________________________________
Cloneable client #1:

**Intangibles:**

<table>
<thead>
<tr>
<th>Client’s core personality traits:</th>
<th>Did the client spotlight your work inside the company?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Yes □ No □</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Client’s work style:</th>
<th>Was the client willing to let you form other relationships inside the company?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Yes □ No □</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Client’s level of organization/being buttoned up:</th>
<th>Were you treated like a thinking partner/strategic advisor or did you just execute?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Yes □ No □</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>When something went wrong, how did the client react/handle it?</th>
<th>On a scale of 1-10, how would you rate the strategies you presented/executed:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Yes □ 2 □ 3 □ 4 □ 5 □ 6 □ 7 □ 8 □ 9 □ 10 □</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>When something went well, how did the client react/handle it?</th>
<th>On a scale of 1-10, how would you rate the creative you presented/executed:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Yes □ 2 □ 3 □ 4 □ 5 □ 6 □ 7 □ 8 □ 9 □ 10 □</td>
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<tr>
<th>Were they a sexy/prestigious client for the agency?</th>
<th>Did working with them open other doors/opportunities for the agency?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes □ No □</td>
<td>Yes □ No □</td>
</tr>
</tbody>
</table>


Cloneable client #2:

**Tangibles:**

Client title: ____________________________________________

Client age: _______ Client gender _______ Client’s years of experience: _______

Annual budget: __________________________________________

Industry: ________________________________________________

Company size: ______________________ # of locations: ______________________

Company ownership structure: _______________________________________

- B-to-B  or  B-to-C

Types of work done for client: _______________________________________

________________________________________________

________________________________________________

Internal structure of marketing department: ___________________________

________________________________________________

Profit margin of the work (you can approximate): ______________________

________________________________________________

Client’s level of marketing sophistication: _____________________________

________________________________________________

Did the agency have access to the C-Suite?  Yes  No

Decision making process on the client side: ___________________________

________________________________________________

Client company’s experience level with agencies: ______________________

________________________________________________

Budget process (did you create it together, were you given a number, etc): _______

________________________________________________

Client company’s position in the marketplace (leader, underdog, start up, newcomer, etc.): _______

________________________________________________

Were you their only agency?  Yes  No

Longevity of the relationship: ________________________________
Cloneable client #2:

**Intangibles:**

Client’s core personality traits:

________________________________________________

________________________________________________

________________________________________________

Client’s work style: _______________________________

________________________________________________

________________________________________________

Client’s level of organization/being buttoned up:

________________________________________________

________________________________________________

________________________________________________

When something went wrong, how did the client react/handle it?

________________________________________________

________________________________________________

________________________________________________

When something went well, how did the client react/handle it?

________________________________________________

________________________________________________

________________________________________________

Did the client spotlight your work inside the company?  
☐ Yes ☐ No

Was the client willing to let you form other relationships inside the company?  ☐ Yes ☐ No

Were you treated like a thinking partner/strategic advisor or did you just execute? ______________________________

________________________________________________

________________________________________________

On a scale of 1-10, how would you rate the strategies you presented/executed:

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10

On a scale of 1-10, how would you rate the creative you presented/executed:

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10

Were they a sexy/prestigious client for the agency?  
☐ Yes ☐ No

Did working with them open other doors/opportunities for the agency?  ☐ Yes ☐ No
Cloneable client #3:

**Tangibles:**

Client title: 

Client age: ____________  Client gender ____________  Client’s years of experience: ____________

Annual budget: 

Industry: 

Company size: __________________ # of locations: __________________

Company ownership structure: __________________

- B-to-B  or  - B-to-C

Types of work done for client: 

________________________________________________

________________________________________________

________________________________________________

Internal structure of marketing department: 

________________________________________________

________________________________________________

Profit margin of the work (you can approximate): 

________________________________________________

Client’s level of marketing sophistication: 

________________________________________________

Did the agency have access to the C-Suite?  Yes  No

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Decision making process on the client side: 

________________________________________________

________________________________________________

Client company’s experience level with agencies: 

________________________________________________

Budget process (did you create it together, were you given a number, etc): ____________

________________________________________________

Client company’s position in the marketplace (leader, underdog, start up, newcomer, etc.) 

________________________________________________

Were you their only agency?  Yes  No

Longevity of the relationship: __________________

---
Cloneable client #3:

**Intangibles:**

Client’s core personality traits:

________________________________________________
________________________________________________
________________________________________________

Client’s work style: ________________________________

________________________________________________
________________________________________________

Client’s level of organization/being buttoned up:

________________________________________________
________________________________________________

When something went wrong, how did the client react/handle it? ________________________________

________________________________________________
________________________________________________

When something went well, how did the client react/handle it?

________________________________________________
________________________________________________
________________________________________________

Did the client spotlight your work inside the company?  
☑ Yes ☐ No

Was the client willing to let you form other relationships inside the company?  
☑ Yes ☐ No

Were you treated like a thinking partner/strategic advisor or did you just execute? ________________________________

On a scale of 1-10, how would you rate the strategies you presented/executed:

☑ 1 ☑ 2 ☑ 3 ☑ 4 ☑ 5 ☑ 6 ☑ 7 ☑ 8 ☑ 9 ☑ 10

On a scale of 1-10, how would you rate the creative you presented/executed:

☑ 1 ☑ 2 ☑ 3 ☑ 4 ☑ 5 ☑ 6 ☑ 7 ☑ 8 ☑ 9 ☑ 10

Were they a sexy/prestigious client for the agency?  
☑ Yes ☐ No

Did working with them open other doors/opportunities for the agency?  
☑ Yes ☐ No
Adding it up

Now that you’ve analyzed the three clients you’d most like to clone, identify the commonalities they shared:

**Tangible Commonalities:**
_____________________________________________________________________________________________________
_____________________________________________________________________________________________________
_____________________________________________________________________________________________________
_____________________________________________________________________________________________________
_____________________________________________________________________________________________________
_____________________________________________________________________________________________________
_____________________________________________________________________________________________________
_____________________________________________________________________________________________________

**Intangible Commonalities:**
_____________________________________________________________________________________________________
_____________________________________________________________________________________________________
_____________________________________________________________________________________________________
_____________________________________________________________________________________________________
_____________________________________________________________________________________________________
_____________________________________________________________________________________________________
_____________________________________________________________________________________________________
_____________________________________________________________________________________________________

Now, select the 7-9 commonalities that they all shared that are most important or valued by you and your team. These should be the commonalities that you feel were most important to creating the great working relationship/opportunity for the agency.
A tool you can use every day

We’ll use the common traits that you just identified to create your sweet spot client filter.

Now that we know the criteria— we need to create the filter that you’ll use to screen prospects. Create a document that looks like this one below. Fill in no more than your top 9 criteria into the document, so you have a quick scorecard that you can use with any prospect. This becomes your sweet spot client filter.

Prospect Organization:

Contact Name: ___________________________ Phone: ___________________________

Address: ______________________________ City/ST/ZIP: __________________________

What do they do? __________________________________________________________________

Source:

☐ Inbound lead: From? (check one) ☐ Option A  ☐ Option B  ☐ Option C  ☐ Option D  ☐ Other ______________

☐ Outbound lead? From? (check one) ☐ Option A  ☐ Option B  ☐ Option C  ☐ Option D  ☐ Other ______________

Criteria #1 (Are in one of our 3 focus industries?)

Criteria #2____________________________________

Criteria #3____________________________________

Criteria #4____________________________________

Criteria #5____________________________________

Criteria #6____________________________________

Criteria #7____________________________________

Criteria #8____________________________________

Criteria #9____________________________________

Criteria #10___________________________________

TOTAL (If #1 is a no, all the rest must be a yes. Otherwise 7+ is minimum to actively pursue.)

Things we should also consider (bonus points)

_________________________________________________________________________________

_________________________________________________________________________________

_________________________________________________________________________________
This needs to be your new norm

The key to using your sweet spot client filter is that you need to be very disciplined about it. You can’t argue against it every time someone has a big bag of money to spend. Really use the tool to screen potential clients so you don’t waste your time, money and ideas chasing after a client who is either never going to choose you or even worse – choose you and turn out to be a bad fit.

When you and your agency are firm about honoring the sweet spot client filter, you’ll attract the clients you can delight every time. This leads to increased budgets, healthy profits and a client retention percentage that means you don’t have to sweat out the ups and downs of a client revolving door.