



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:

Decision making process on the client side:

Internal structure of marketing department:

Client company's experience level with agencies:

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

Profit margin of the work (you can approximate):

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

Client's level of marketing sophistication:

Were you their only agency? Yes No

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

Longevity of the relationship: _____



Cloneable client # 1:

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 #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:

Decision making process on the client side:

Internal structure of marketing department:

Client company's experience level with agencies:

Profit margin of the work (you can approximate):

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

Client's level of marketing sophistication:

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

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

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:

Decision making process on the client side:

Internal structure of marketing department:

Client company's experience level with agencies:

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

Profit margin of the work (you can approximate):

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

Client's level of marketing sophistication:

Were you their only agency? Yes No

Did the agency have access to the C-Suite? 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.

If the prospect is not in one of your core industries (you do have 2-3 of those, don't you?), then all the other criteria must be present/received a yes score to be considered eligible for consideration. If the industry answer is yes - the prospect must score at least 70% over all to be worthy of your time and attention.

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.

