intuit quickbooks CONNECT

Creating your ideal client profile

Kellie Parks, CPB

OWN THE FUTURE

About today's speaker

I am a relentless organizer and believe cloud financial technology is key to organization.

I'm a proud member of the Intuit Trainer Writer Network.

Kellie Parks, CPB

Cloud Accounting Aficionado

@kellie_parks

I'm certifiable!

Certified Professional Bookkeeper

QuickBooks Online Advanced Pro Certified

17Hats Partner, Acuity Partner, Aeroworkflow Partner, Dubsado Partner, Hubdoc Advanced Partner, Karbon Partner, Pandadoc Partner, Plooto Partner, Practice Ignition Partner, Receipt Bank, Reply Partner, Rewind Partner, TSheets Certified, WagePoint Certified, Waypay Wizard, Zoom Partner.

My personal life by the numbers

I have **3** grown kids and live with **2** unruly Australian Shepherds with **1** husband who is a [fly fishing guide] in a **100** year old lakeside cabin (that is chronically under renovation)

Daughter in law
Yes, I can count.


Take a minute
to connect with
your neighbor
#QBConnect | WiFi: QBConnect

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Agenda

Defining the elements of an ideal client profile.

Identifying how an ideal client profile creates effectiveness for your workflows.

Creating an actual, actionable ideal client profile.

“

You don’t have an ideal client profile?

What???

Do you really want to spend your day with clients who don't fit?

Who don't value you?

Who don't pay you enough?

Who you don't get along with?

And how about the drudgery of doing tasks and work you loathe?

No thank you!

This is not a session all about the theory of "the ideal client".

We are going to create a real live, actionable ideal client profile.

Let's map this out right now - what the elements an ideal client include (or don't't include) and get that profile locked down.

Let's get you moving on streamlining workflows, spending the day doing work you love with profitable clients you enjoy.

You can only create a firm and client culture of respect & work fulfillment if it is known who your firm loves to do business with, what your technology is going to be and what the work is that your firm loves & does well.

What are some other terms for ideal client?

Target audience.

Customer persona.

Customer avatar.

This one creeps me out a little.

Whatever you decide to call it, get on with creating it.

Why do I believe every business needs an ideal client profile?

I've had a number of businesses over the last 30 years.

And I loved them all.

The clients, the work, the lifestyle…

and of course the money.

The reason I loved them all, the reason I've had a number of completely different types of businesses, rests solely on always having had a current Ideal Client Profile.

Here's the mini version of my business story

Phys-Ed, sports therapy stream.

I knew I only wanted to work on people who were as invested as recovery as I was in getting them back in the game.

Then I realized I really didn't like touching people and there was never going to be an ideal client with this career.

Print industry.

I knew I only wanted to deal B2B, with larger companies that had purchasing departments.

The print product didn't matter, just the size of the orders and the process.

Branding & marketing.

I realized I only wanted to do corporate, high-end projects with professional team levels and processes.

The product now mattered very much.

The team needed to engage in my workbacks (aka workflows) & systems and bear responsibility for fallouts.

Here's the mini version of my business story

Early bookkeeping.

I wanted to do books for incorporated businesses with clients fully engaged in their business financials.

I would only work in Quickbooks Desktop.

I would only take on full-cycle bookkeeping.

Mid-life bookkeeping.

I would only work in QuickBooks Online / hosted QuickBooks Online Desk Top with bank feeds connected and document management/payment processing apps connected.

Payroll had to be done by a provider.

No multi currency or inventory.

Work was remote with on-site visits if I felt like it.

Now bookkeeping.

I only work in QuickBooks Online with bank feeds connected and document management/payment processing apps connected.

Payroll has to be done by a provider.

No multi currency or inventory.

Work is remote with on-site visits if I feel like it.

Here's the mini version of my business story

I have few new gigs.

Coaching accounting professionals.

I want everyone to love online accounting as much as I do.

Must be way over the why and now want the how.

Must be willing to take action.

Partnering with applications.

I want the online financial technology to progress in the direction accounting professionals deem valuable.

Must care deeply about the needs of the accounting industry.

Must be willing to take action.

Blah, bla, blah…

That's what you really heard.

Right!?

In fact, I hope there's a takeaway - or 5 - here

1. I have always loved what I do.

2. I have loved who i worked with.

3. I have reviewed my ideal client profile often.

4. I have pivoted with my ideal client profile to re-create my business model.

5. My business model has matched my lifestyle model.

What I hope you noticed is that my ideal client is intricately tied to my business model.

There is overlap so get a “**side hustle document**” going for building out your corporate values, service offerings, tech stack, team size and mission statement.

Who has a pet(s) that you consider perfect?

I do. Here's mine.

Kellie's ideal dog profile

A bit Saasy - not too docile.

Only barks at me and others if it's well deserved.

Listens well to instructions.

Is above average intelligence.

Doesn't pick food off my plate.

Engaged in their work.

Medium size.

Is not too clingy.

Embraces my routines.

Is willing to try new tricks.

Welcomes new toys.

Is not homogeneous.

Gratuitous dog photos

Actually this is pretty much my ideal client profile!

Kellie’s ideal client profile

A bit Saasy - not too docile.

Only barks at me and others if it’s well deserved.

Listens well to instructions.

Is above average intelligence.

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Kellie’s ideal partner profile

I could have done a better job of this.

First adult love.

Professional athlete, should have known he was going to get traded away.

Starter husband.

Apparently being your ski boat driver and coach is not part of the ideal partner profile.

Current spouse.

Even though he doesn’t care how the dishwasher gets loaded.

Kellie's ideal partner profile

Actually they were perfect at the time.

This was more of a case of me changing my ideal as I grew and them changing who they were as they grew.

I revised my Ideal Partner Profile as I moved through life.

And this is important

You, your clients, your business are all going to change and grow (or shrink).

Your ideal client profile needs to change and grow as well.

Defining your ideal client creates effectiveness in your workflows

You know what the work is going to be.

You know what the communication looks like.

You know what your tech stack is.

This creates clarity, consistency, efficiency and predictability.

For you.

For your clients.

For your team.

Defining your ideal client creates effectiveness in your workflows

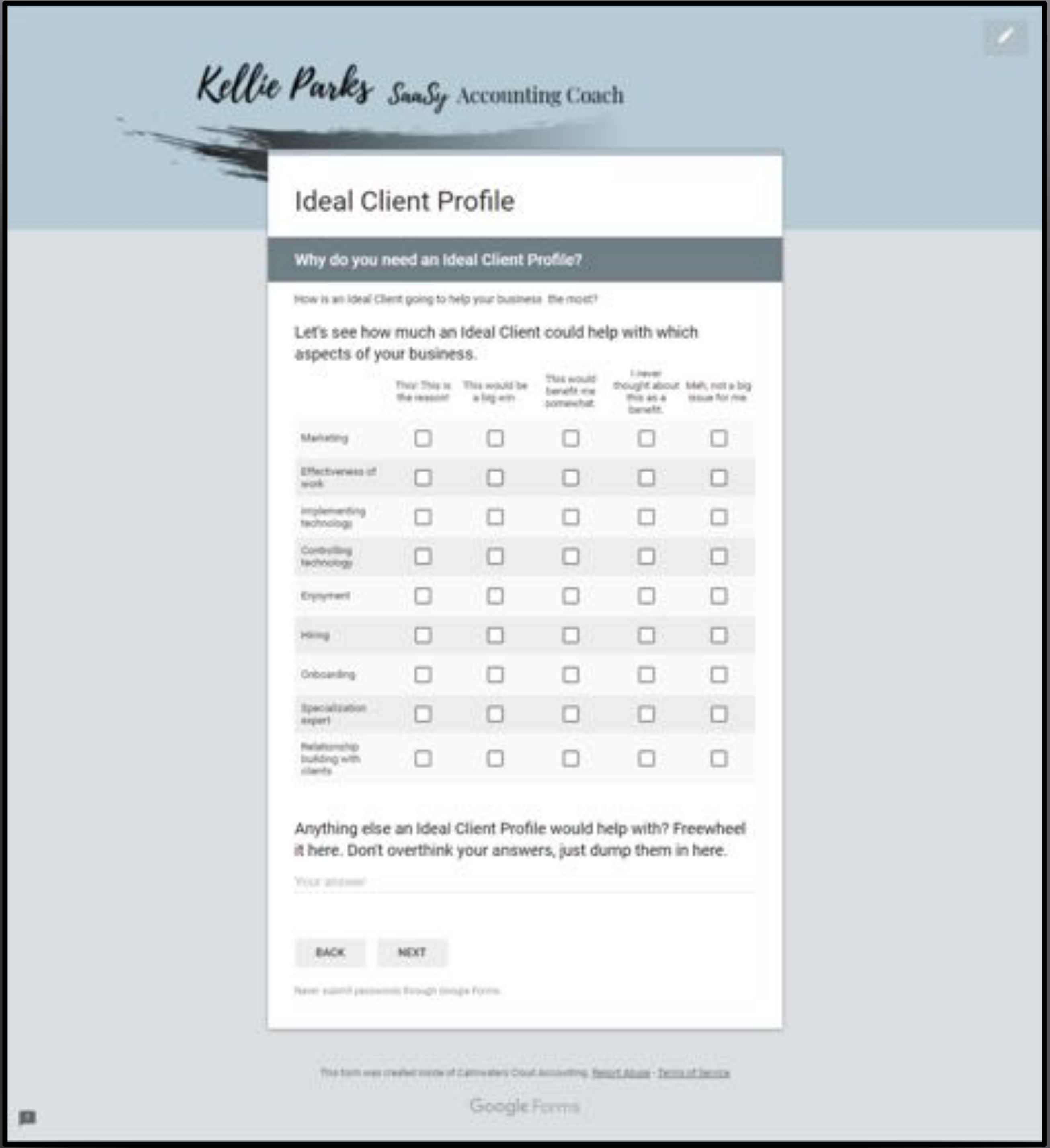
Which leads to profitability!

And meaningful, organized, respectful relationships.

Let’s build your ideal client profile!

That’s enough of me yabbering on.

Let’s do this thing!



Kellie Parks SaaSy Accounting Coach

Ideal Client Profile

Why do you need an Ideal Client Profile?

How is an Ideal Client going to help your business the most?

Let's see how much an Ideal Client could help with which aspects of your business.

	This! This is the reason!	This would be a big win	This would benefit me somewhat	I never thought about this as a benefit.	Meh, not a big issue for me
Marketing	☐	☐	☐	☐	☐
Effectiveness of work	☐	☐	☐	☐	☐
Implementing technology	☐	☐	☐	☐	☐
Controlling technology	☐	☐	☐	☐	☐
Enjoyment	☐	☐	☐	☐	☐
Hiring	☐	☐	☐	☐	☐
Onboarding	☐	☐	☐	☐	☐
Specialization expert	☐	☐	☐	☐	☐
Relationship building with clients	☐	☐	☐	☐	☐

Anything else an Ideal Client Profile would help with? Freewheel it here. Don't overthink your answers, just dump them in here.

Your answer

BACK NEXT

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Google Forms

What are some of the things related to how you want to work that would make a client ideal?

Here's some that come to mind for me. Decide if they matter to you and then fill out your thoughts below.

	Where you will work	Technology	Niche/vertical	Services you love to provide	Services you loathe	Size of client	Price charged to client	Business structure of client
This matters very much to me.	☐	☐	☐	☐	☐	☐	☐	☐
This doesn't press a button.	☐	☐	☐	☐	☐	☐	☐	☐
I'm not sure what you mean by this.	☐	☐	☐	☐	☐	☐	☐	☐

Where you will work

- ☐ Remote only
- ☐ Remote and onsite
- ☐ In an office
- ☐ From a home office
- ☐ Other: ____________________

Technology. Do you have a line of technology that is all you will work in? Or are you open to variables?

Your answer ____________________

Niche/verticals. Do you have a preferred industry(ies) to work in?

Your answer ____________________

Or ones you simply won't go near?

Your answer ____________________

Here are some thoughts on accounting & bookkeeping services to get you started. It's important to know what you will do. And the key to establishing what you won't!

	Yup. I love doing this.	I will take on a client ...	Not a stinking chance.	I haven't thought eno...
Accounts Payable Ent...				
Vendor Payments. Ful...				
Bank & Credit Card Re...				
Sales Clearing Accou...				
Class Tracking.				
Reporting and Analysi...				
Year End Prep and Ac...				
Sales Tax Filing.				
Corporate Tax Returns.				

Personal Tax Returns.	☐	☐	☐	☐
Invoicing and Account...	☐	☐	☐	☐
Payroll.	☐	☐	☐	☐
Job Costing - no labo...	☐	☐	☐	☐
Full Job Costing	☐	☐	☐	☐
Multi-currency – other...	☐	☐	☐	☐
Inventory Tracking an...	☐	☐	☐	☐

We're freewheeling again. Other services you love to provide.

Your answer

Other services you loathe.

Your answer

What are some other "how you want to work" ideas?

Your answer

Here are thoughts on advisory services.

- [ ] Workflow and process mapping.
- [ ] Strategic partnerships for insurance, incorporation, financial planning.
- [ ] CFO engagements.
- [ ] CRA representation (voluntary disclosure).
- [ ] Family trust accounting and representation.
- [ ] Audit engagements.

- [ ] Rescue file work.
- [ ] Business valuations.
- [ ] Forensic accounting.
- [ ] Foreign tax.
- [ ] International services.
- [ ] Holding company accounting.
- [ ] Corporate restructuring.
- [ ] Corporate insolvency.
- [ ] Personal insolvency.

Let's get down other advisory services that come to mind. Or define the above more clearly.

What size of client do you want to take on?

- [ ] I want a few clients that take up most of my work
- [ ] I want a few major clients and round it out with some smaller ones.
- [ ] I want all small clients.
- [ ] I haven't thought about the mix of the size of my work/client.
- [ ] Other: ____________________

Do you have a minimum price you will be charging?

- ○ Yes
- ○ No
- ○ Other: ____________________

Do you have a maximum price you will be charging?

- ○ Yes
- ○ No
- ○ Maybe
- ○ Other: ____________________

Does their business structure matter? What type will you take on? Or are they all good by you?

- [ ] Sole Proprietor
- [ ] Partnership
- [ ] Limited Liability Company (LLC)
- [ ] Incorporated
- [ ] Cooperative
- [ ] Family Trust
- [ ] Non (Not For) Profits/Charities
- [ ] Other:

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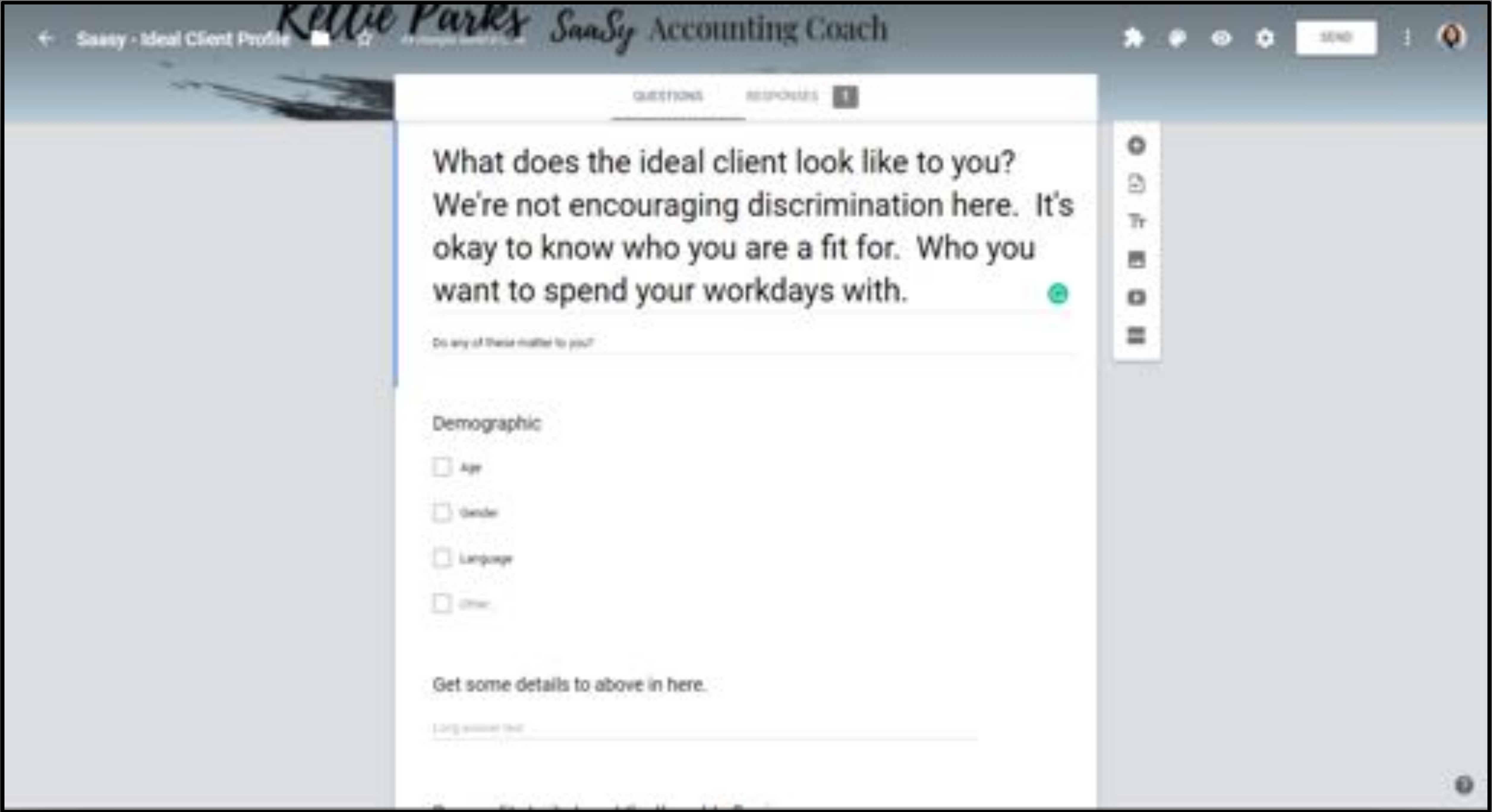
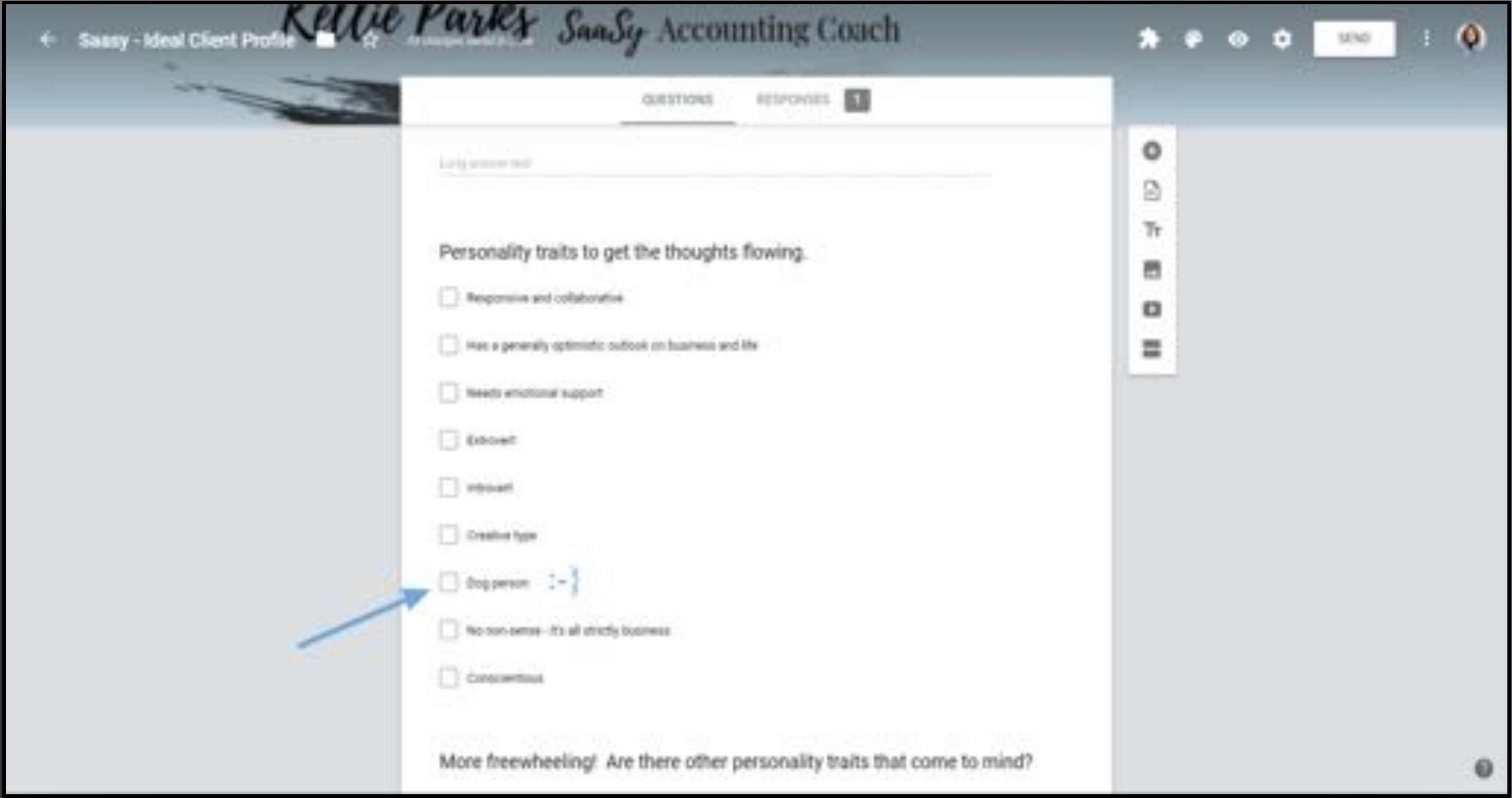

Saasy - Ideal Client Profile
Kellie Parks SaaSy Accounting Coach
QUESTIONS
RESPONSES
What does the ideal client look like to you? We're not encouraging discrimination here. It's okay to know who you are a fit for. Who you want to spend your workdays with.
Demographic
Age
Gender
Language
Get some details to above in here.


Saasy - Ideal Client Profile
Kellie Parks SaaSy Accounting Coach
QUESTIONS
RESPONSES 1
Personality traits to get the thoughts flowing.
Responsive and collaborative
Has a generally optimistic outlook on business and life
Needs emotional support
Extrovert
Introvert
Creative type
Dog person
No non-sense - it's all strictly business
Conscientious
More freewheeling! Are there other personality traits that come to mind?

How are you going to collaborate with them? This goes back to their and your personality fits.

- [ ] Compliant with tax regulations - no "fine line accounting" beliefs
- [ ] They can set the compliance table
- [ ] Engaged with their business and the accounting processes/technology
- [ ] Hands off involvement - wants reports only
- [ ] Embraces cloud financial technology
- [ ] I have no need for them to be involved in the tech
- [ ] Will allow bank connections to cloud financial technology
- [ ] Willingness to collaborate and follow my best practices, processes, systems and workflows that I implement for them
- [ ] Respects the communication methods and time frames we have implemented
- [ ] They can set the stage for how they communicate with me
- [ ] Wants higher level advisory services
- [ ] Simply wants the base information for tax filing
- [ ] Will make sincere efforts to implement suggestions
- [ ] Is not an "ask-hole"

Now how about you do a little navel-gazing?

- [ ] I value empowering autonomy
- [ ] I like clients dependence on me
- [ ] I am a persuer
- [ ] Or a distancer
- [ ] I am a pleaser
- [ ] I am a complete doormat
- [ ] I am great at enforcing boundaries
- [ ] I am controlling (it's not always a bad thing)
- [ ] I am rigid about my processes
- [ ] I am an integrator - blend situations
- [ ] I am a segmentor - compartmentalize situations
- [ ] Other

QUESTIONS RESPONSES 1

Other...

You know what to do here by now. Get your ideas down about your clients.

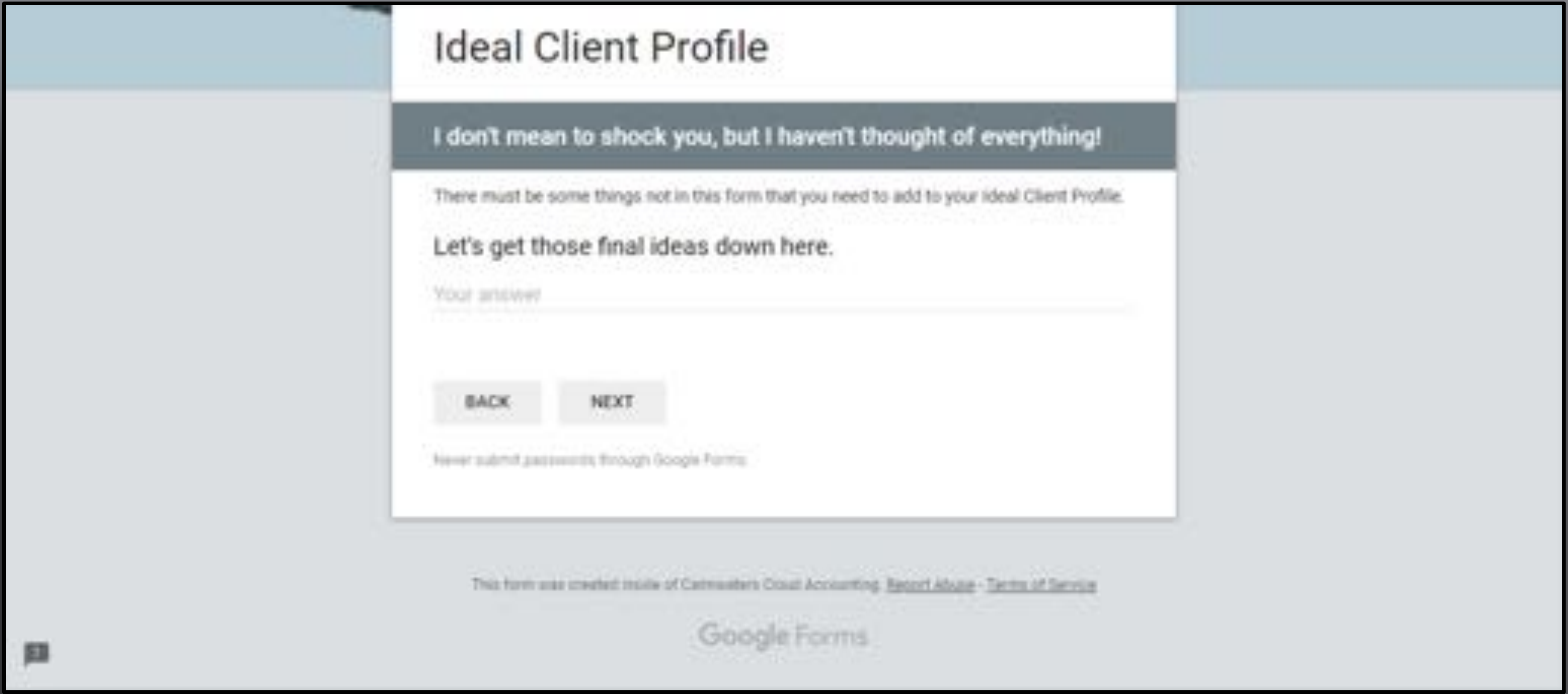
Long answer text

And about you...

Long answer text

Here's a fun rabbit hole to go down. It may give you some insight into yourself and your ideal client.

https://www.myersbriggs.org/my-mbti-personality-type/mbti-basics/the-16-mbti-types.htm?bhcp=1


Ideal Client Profile

I don't mean to shock you, but I haven't thought of everything!

There must be some things not in this form that you need to add to your Ideal Client Profile.

Let's get those final ideas down here.

Your answer

BACK NEXT

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Google Forms

We started to build your ideal client profile!

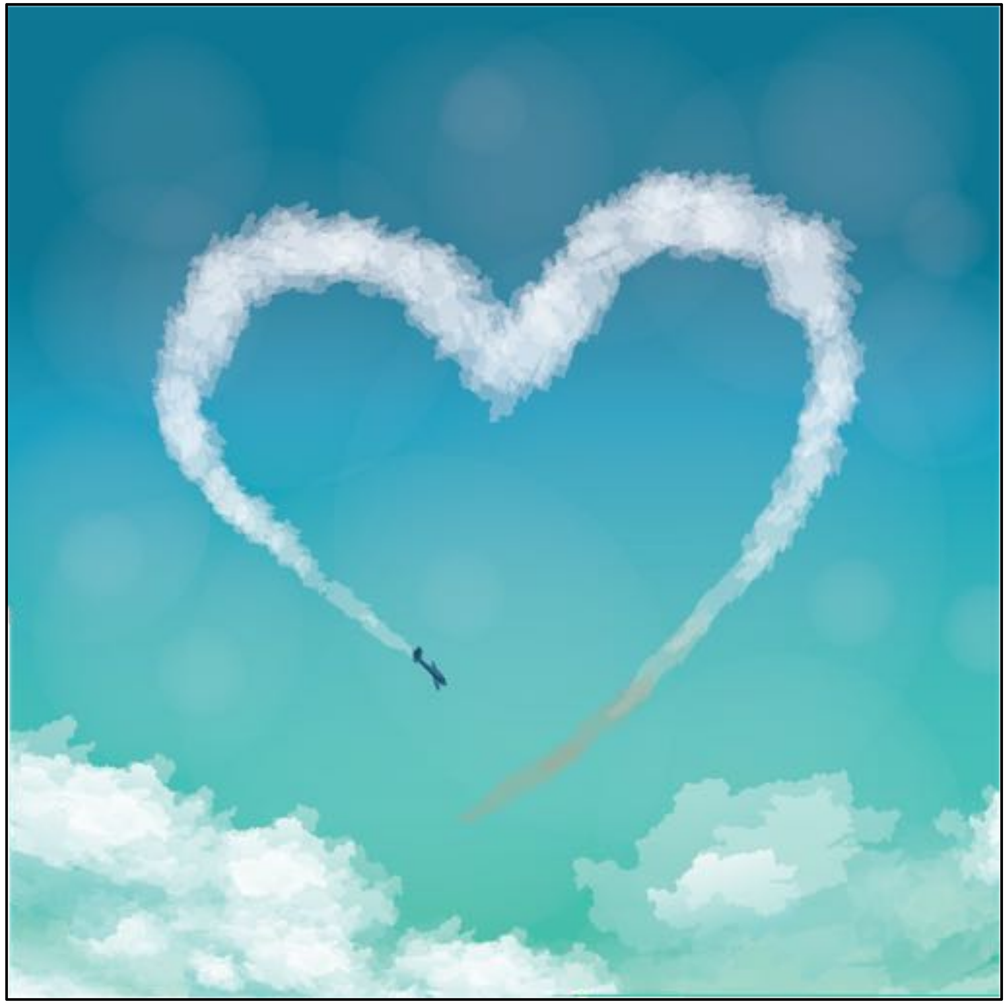
Feels good right!?

Now make it actionable.

Starting figuring out who doesn’t fit...

We started to build your ideal client profile!

...and make room
for ones that do.



What's to gain for my business with all this profiling?

A defined & rationalized tech stack.

End app overwhelm.

End app subscription sticker shock!

A targeted audience.

Create consistent, meaningful messaging.

Know where to place your messaging efforts!

Honed best practices, systems and workflows.

You know who, what, when to build out consistent, meaningful processes.

What’s to gain for my business with all this profiling?

A happy you (and team).

You are only working with clients you enjoy.

Happy clients.

You are only working working with clients that have aligned business needs and values.

Happy profitability.

You are only working with clients who value what you are bringing to their business.

Right!?

What’s not to love about creating your ideal client profile!?

Questions?

Today’s big takeaways

Covered what the elements of an ideal client include (or didn't include).

Discussed how an ideal client profile creates effectiveness for your workflows.

Created (or started to create) an actual, actionable ideal client profile!

You can only build a firm and client culture of respect & work fulfillment if it is known who your firm loves to do business with, what your technology is going to be and what the work is that your firm loves & does well.

Thank you!

Fill out the survey!

Intuit really, really cares about delivering valuable, actionable content.

So let them know how we are all doing at achieving these goals.

Would you like to work with me to create your ideal client profile?

I gig on helping accounting professionals love their businesses as much as I love mine.

I can’t wait to hear from you!

Kellie Parks
#SaasyAccountingCoach

Would you simply like to purchase my ideal client profile worksheet?

Here's a link.

Kellie Parks
#SaasyAccountingCoach

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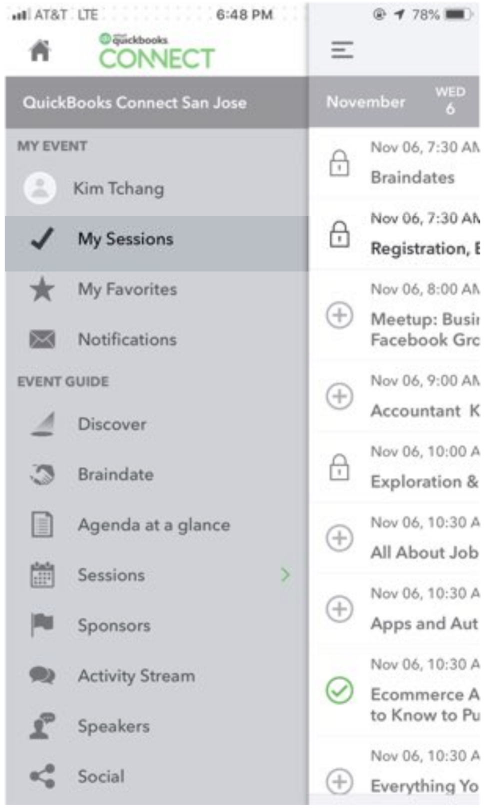

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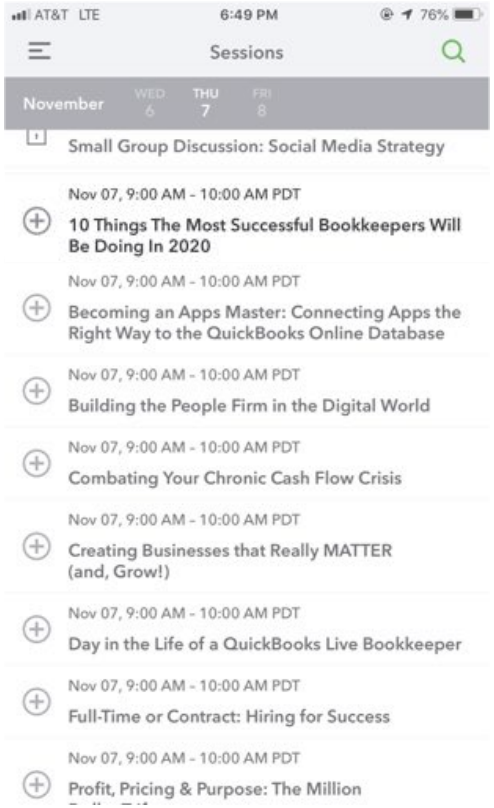

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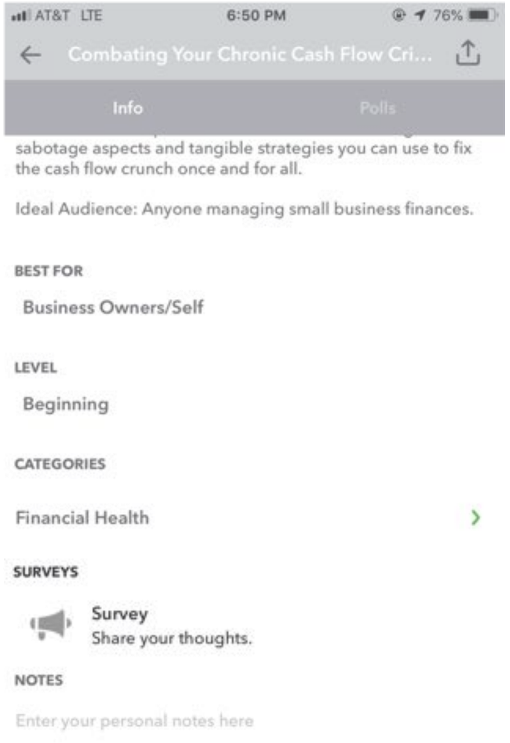

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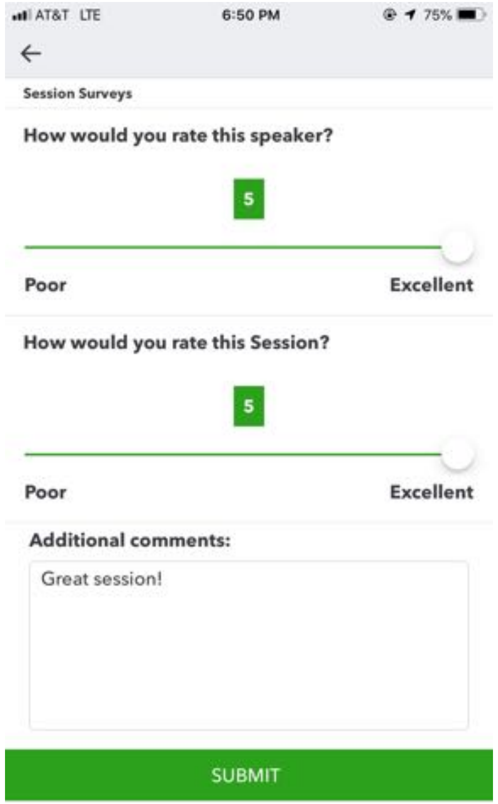

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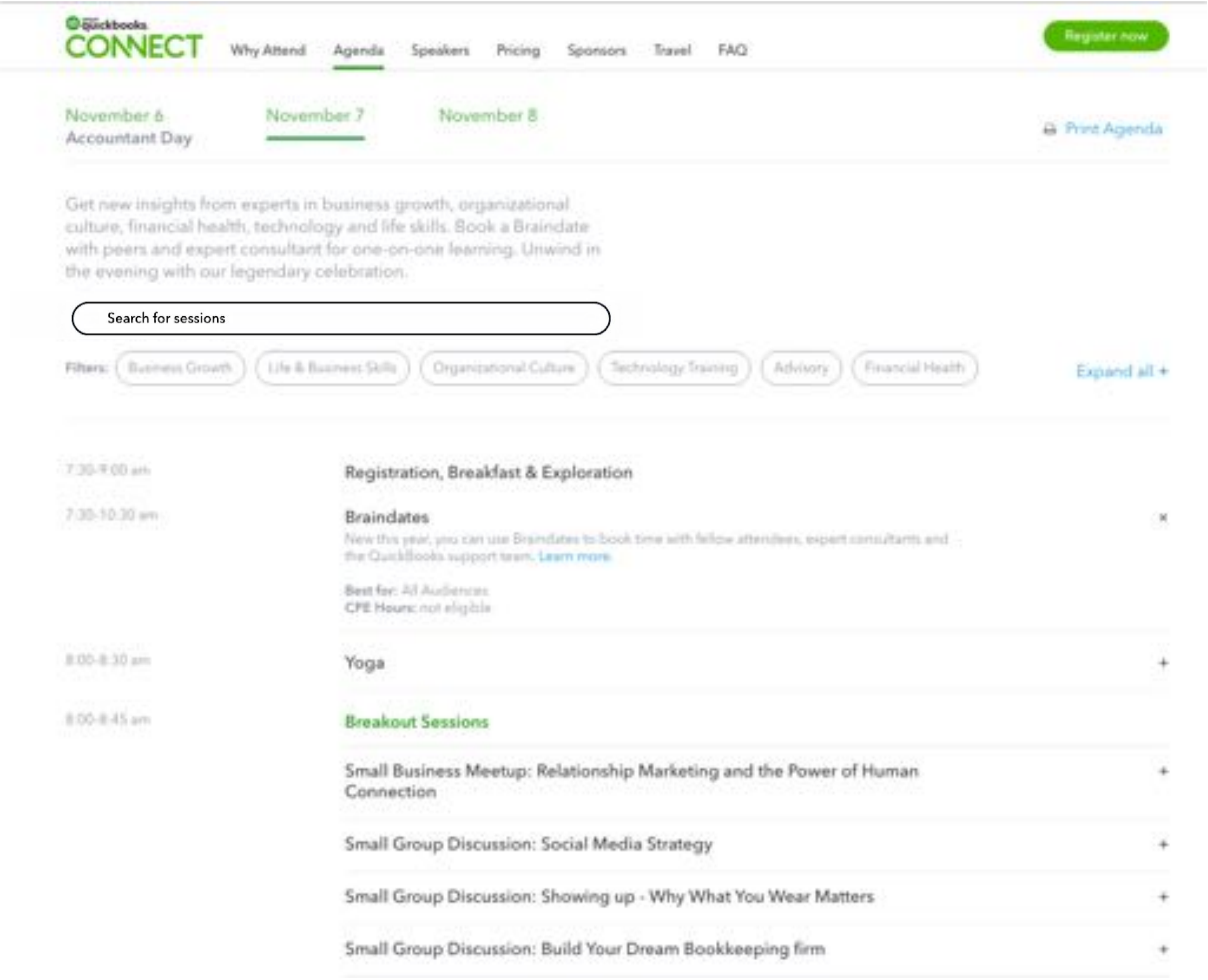

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