

Ideal client blueprint

Evaluate each of the three client categories to align with your strategic direction and identify your ideal client profile. Once you're clear on your bullseye ideal client, shape your offering to drive capacity and growth.

		Client categories		
Client attribute	Detail	Bullseye	Secondary	Non-client
Commerciality	Revenue or proxy, e.g. total fees, FUA, strategic importance and/or spheres of influence, sufficient market size and/or differentiation strength			
Demographics	Age, geography, profession, income, assets etc.			
Psychographics	Delegator vs validator, relationship vs transactional, strategic vs investment, values and cultural fit etc.			
Needs and complexity	Services, assets, family and estates, communication channels, meeting formats, education, etc.			

Talk to us today - understand how Macquarie can help your business thrive in a changing environment, [click here to request a call.](#)

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