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## Who Are Your Existing Clients?

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*YOU CURRENTLY HAVE Four TYPES OF CLIENTS:*

### 1. “A” CLIENTS

These are your very best clients. These clients are successful professionals, affluent retirees, and small business owners. You like them, they listen to you and they refer their friends and family.

These are also people you want to clone. If you could have a lot more clients, these are the ones you want. The beauty about your A client is the fact that they seem to run in the same circles. Because of that, they can and do generate great referrals that turn out to be “A” clients as well. An “A” client could be a former “B” client.

“A” clients generate \$\_\_\_\_\_ revenue per year.

### 2. “B” CLIENTS

“B” clients are future “A” clients; they could also be former “A” clients. You’ll spend more time profiling and gathering assets that you don’t already have. I found that one reason you didn’t have all their business was simply that you have not established credibility fully or they don’t perceive you as someone who can handle their entire financial situation.

Just because someone is a “B” client this year, doesn’t mean they are a “B” client forever. Your job is to uncover all the assets. This takes time and comes from establishing long-term relationships that are built on the highest levels of trust, integrity and service.

If a “B” client is not promoted, they must be managed to consume a minimum amount of your time.

“B” clients generate \$\_\_\_\_\_ amount of revenue per year.

### 3. “C” CLIENTS

Your “C” clients are those who generate very little income for you. This might be a client that you inherited, or maybe they did one transaction with you and there isn’t any more opportunity, at least right now. It’s important to set the right

service expectations with your “C” clients. The relationship is more reactive on your part, but you can set the expectation that if their situation changes (financially), they should call you.

“C” clients generate \$\_\_\_\_\_ amount of revenue per year and don’t really give you referrals.

#### 4. “F” CLIENTS

Everyone has a few “F” clients. We call them “F” clients because you really should fire these clients. It doesn’t matter how much assets these clients have or the potential. They don’t take your advice, give you referrals and can consume your valuable time with service issues. It’s OK to fire these clients.

**Now, go through your entire client list:**

- ☐ First, list all your clients by portfolio size and revenue generated
- ☐ Second, promote clients to the top who could potentially become “A” or “B” clients.
- ☐ Third, promote those clients who are large centers of influence.

**Where you draw the lines will determine how much your income goal currently is and how many clients you currently have.**

	# of Clients	Total Revenue
<u>“AA” CLIENTS</u>	_____	\$ _____
Average Revenue per “AA” Client		\$ _____
<u>“A” CLIENTS</u>	_____	\$ _____
Average Revenue per “A” Client		\$ _____
<u>“B” CLIENTS</u>	_____	\$ _____
Average Revenue per “B” Client		\$ _____
<u>“C” CLIENTS</u>	_____	\$ _____
Average Revenue per “C” Client		\$ _____
<u>“F” CLIENTS</u>	_____	\$ _____
Average Revenue per “F” Client		\$ _____

## Client Breakdown

	TOTAL #	% of TOTAL Revenue
TOTAL "AA" CLIENTS	_____	_____
TOTAL "A" CLIENTS	_____	_____
TOTAL "B" CLIENTS	_____	_____
TOTAL "C" CLIENTS	_____	_____
TOTAL "F" CLIENTS	_____	_____
TOTAL Clients and Revenue (Add AA, A, B, C & F clients)	<div></div>	<div></div>