

THE IDEAL CLIENT NICHE - B2C



How could I use this information to find more ideal clients?

Where are they based?		
What they do for a living?		
Employed, Self Employed or Business Owner?		
How much do they earn?		
How old are they?		
Marital Status?		
Gender?		
Homeowner or renting?		
Where do they hang out online?		
Where do they hang out in reality?		
What do they read?		
Who do you like working with?		
What's their total Net Worth?		

THE IDEAL CLIENT NICHE - B2C



How could I use this information to find more ideal clients?

What other assets do they own?		
Where do they like to holiday?		
What do they like to watch/do?		
Who do they support?		
What clubs are they members?		
Where do they eat/drink?		
What are their current goals?		
What are their current fears?		
What are their similar profile traits?		
What Do They Like and Need?		

Write 1 sentence that sums up the most common and important characteristics

--

Their new name	
----------------	--

What 3 actions could I immediately take to find more Ideal Clients?	1. 2. 3.
---	--

THE IDEAL CLIENT NICHE - B2C



How could I use this information to find more ideal clients?

Where are they based?	UK - primarily London, South East, and Midlands	Run city-specific events and "near you" case studies
What they do for a living?	Owners/MDs/Partners of professional-service businesses	SEO terms and run industry-specific webinars
Employed, Self Employed or Business Owner?	Business Owner	Tailor website copy to address founder pain (time-freedom, de-risking, recurring revenue)
How much do they earn?	£100k+	Target only established businesses, filtering out very early-stage ones.
How old are they?	30-60	Target the 35-50 cohort on; reference career/life stage (team scaling, family time) in hooks.
Marital Status?	Mixed	
Gender?	Mixed	
Homeowner or renting?	Predominantly homeowners	Use "asset-building business" language in ads and landing pages
Where do they hang out online?	LinkedIn, Slack/WhatsApp	Account Based Marketing ads on LinkedIn
Where do they hang out in reality?	Professional events, curated founder clubs, quality co-working spaces.	Host events at these venues; "bring-a-peer" guest passes; in-venue QR lead magnets
What do they read?	Harvard Business Review, Financial Times, The Economist etc., books on AI and business growth.	Introduce them to great books, write more guest articles for popular publications.
Who do you like working with?	Coachably ambitious, generous, integrity-led, data-curious, open to systems/AI.	Add screening questions to forms; spotlight member behaviours you value; publish "How we work" to attract/repel.
What's their total Net Worth?	£1m+	Offer tiered coaching levels, focus on how to reduce risk and increase company value.

THE IDEAL CLIENT NICHE - B2C

How could I use this information to find more ideal clients?

What other assets do they own?	Business equity, primary residence, pensions/SIPPs, ISAs.	Create content on “making the business a sellable asset”; arrange co-hosted events.
Where do they like to holiday?	Short EU breaks, active trips (Mallorca cycling), ski, family sun.	Time campaigns around peak travel; use active-travel metaphors and visuals that resonate.
What do they like to watch/do?	Founder podcasts, endurance sport, ops/AI how-to podcasts.	Cross-promote on endurance/business podcasts; short AI ops demos as lead magnets.
Who do they support?	Often local clubs/teams; endurance bias.	Sponsor local endurance/business meetups; segment ads by interest (cycling/tri/running) for relevance
What clubs are they members?	Curated founder networks, chambers, endurance clubs	Pitch talks to associations; member-only offers; referral partnerships with club admins
Where do they eat/drink?	Quality coffee spots, co-working cafés, independent restaurants, private member clubs.	Host invite-only founder lunches; “member brings a founder” breakfasts; collaborate with venue mailing lists.
What are their current goals?	Build recurring revenue, steady ideal-client pipeline, deploy AI, align team.	Create offer pages mapping goals; outcome-based testimonials.
What are their current fears?	Pipeline volatility, margin squeeze, “founder as bottleneck,” falling behind on AI/marketing.	Customise adverts, webinars and courses to address each fear.
What are their similar profile traits?	Growth-minded, time-poor, quality-driven, likes playbooks and peer challenge.	Create more website copy focus on playbook style learning and accountability.
What Do They Like and Need?	Trusted peer group, proven playbooks, dashboards, introductions.	Highlight business growth through “before/after” dashboards from current Members.

1 sentence that sums up the most common and important characteristics

Coachable UK professional-services founder seeking AI-enabled systems and referral-rich recurring revenue to reduce founder-dependence.

Their new name	The Compound-Growth Professional (CGP)	Use the label in ads (“Are you a CGP?”), in forms, and in internal alignment to keep messaging consistent.
What 3 actions could I immediately take to find more Ideal Clients?	- Contact 50 target partners on LinkedIn with a 2-minute case-study video invite. - Spotlight referrers on Social Media with a thank-you post. - Co-host a webinar with a relevant group/company.	

THE IDEAL CLIENT NICHE - B2B



How could I use this information to find more ideal clients?

Where is the company headquarters?		
What industry are they in, and what core services/products do they provide?		
Who is the primary buyer (role/title), and what is their decision authority?		
What's the company's annual revenue?		
What stage is the company (startup, scale-up, established)?		
Who sits on the leadership team?		
Which roles make up the buying committee, and who signs off?		
What's their footprint (single/multi-site, leased/owned, remote/hybrid)?		
Which online channels do they follow (LinkedIn, forums, trade media, newsletters)?		
Which in-person events do they attend?		
Which journals/research/analyst reports may influence their decisions?		
What client/firm attributes make them a great fit?		
What's their total Net Worth?		

THE IDEAL CLIENT NICHE - B2B



How could I use this information to find more ideal clients?

What systems and vendors do they already use?		
What is their seasonal cadence?		
How do they prefer to learn and evaluate vendors?		
Which partners, platforms, or associations do they already trust or buy from?		
Which professional bodies, trade associations, or peer networks are they part of?		
What is their preferred meeting format and venue?		
What are their top 12-month priorities?		
What are their current risks/ pain points?		
What cultural/operational traits do they share?		
What do they require, and what support do they expect?		

Write 1 sentence that sums up the most common and important characteristics

--

Their new name	
What 3 actions could I immediately take to find more Ideal Clients?	1. 2. 3.

THE IDEAL CLIENT NICHE - B2B



How could I use this information to find more ideal clients?

Where is the company headquarters?	UK & Ireland, concentrated in London, the South East, the Midlands, and Dublin.	Run geo-targeted LinkedIn campaigns and prioritise partner channels with local accountants and ERP resellers.
What industry are they in, and what core services/products do they provide?	Professional services, technology, and wholesale/distribution with significant invoice volume.	Build vertical campaigns per sector with tailored pain points and case studies.
Who is the primary buyer (role/title), and what is their decision authority?	FO/Finance Director with final commercial sign-off, evaluation delegated to Financial Controller and AP Manager.	Aim messaging at CFO outcomes while supplying controller/AP proof packs, and book first meetings via the controller to accelerate consensus.
What's the company's annual revenue?	£10–£200 million in annual revenue.	Filter prospects by revenue bands, align pricing/ROI to their scale.
What stage is the company (startup, scale-up, established)?	Scale-ups and established firms undergoing finance transformation.	Trigger outreach around growth, audits, ERP changes, or funding news that signal readiness to modernise AP.
Who sits on the leadership team?	CEO/MD, CFO/FD, COO, and CIO/CTOs.	Request warm introductions from CEOs to CFOs.
Which roles make up the buying committee, and who signs off?	CFO/FD, Financial Controller, AP Manager, IT/Security, and Procurement.	Map content to stakeholders - ROI and risk for CFO, workflow demos for AP etc.
What's their footprint (single/multi-site, leased/owned, remote/hybrid)?	Multi-site organisations with hybrid teams and a mix of leased offices and remote finance staff.	Emphasise cloud access, role-based approvals, and multi-entity support in campaigns.
Which online channels do they follow (LinkedIn, forums, trade media, newsletters)?	LinkedIn, AccountingWEB, ICAEW newsletters, CFO Dive, and vendor/ERP partner newsletters.	Sponsor and contribute to these channels, run LinkedIn thought leadership, and co-market via ERP partner lists.
Which in-person events do they attend?	Accountex, CFO/finance leadership forums, ICAEW regional events.	Host theatre sessions and live demos at these events..
Which journals/research/analyst reports may influence their decisions?	ICAEW/HMRC updates, and Big Four finance transformation insights.	Align messaging to regulatory updates, and provide compliance checklists that capture leads.
What client/firm attributes make them a great fit?	1,000–20,000 invoices per month, manual AP bottlenecks.	Qualify on invoice volume and ERP, prioritise multi-entity prospects.
What's their total Net Worth?	Net assets of £2m+, prioritise operational indicators like invoice volume and cash conversion cycle.	Focus targeting on AP throughput, DPO goals, and ERP stack where value is clearest.

THE IDEAL CLIENT NICHE - B2B

How could I use this information to find more ideal clients?

What systems and vendors do they already use?	Accounting tools plus email/chat and e-signature tools.	Target companies using those tools and show click-to-connect demos for each one.
What is their seasonal cadence?	Busiest at month-end, quarter-end, year-end, and around audits and tax deadlines.	Time campaigns and “close faster” offers just before those periods.
How do they prefer to learn and evaluate vendors?	Short demo, simple free trial/pilot, quick savings summary and customer reference.	Offer a 20-minute demo, 30-day pilot then reference call as a clear, fast path.
Which partners, platforms, or associations do they already trust or buy from?	Accountants, accounting-software providers and respected local business groups.	Co-market with those partners and share joint case studies for credibility.
Which professional bodies, trade associations, or peer networks are they part of?	Finance bodies and local Chambers of Commerce or CFO peer groups.	Run member webinars with CPD credit and member-only pilot offer.
What is their preferred meeting format and venue?	30-minute video call, 60-minute online workshop with wider team, on-site only for rollout.	Make this journey one-click bookable so prospects can schedule each step easily.
What are their top 12-month priorities?	Close the books faster, cut invoice costs, stop fraud and errors and scale without extra hires.	Lead messages with these outcomes and show before-and-after numbers.
What are their current risks/pain points?	Duplicate or late payments, unclear approvals, audit issues and poor visibility.	Offer quick “AP risk check” that flags these gaps and proposes fixes.
What cultural/operational traits do they share?	Practical, rule-aware, and KPI-driven, expect clear timelines and accountability.	Publish simple SLAs, go-live timelines, and uptime stats to build trust fast.
What do they require, and what support do they expect?	Secure, compliant software that plugs into accounting system and a named person to help them go live quickly.	Package a “security + setup” kit and promise a named success manager with a 30-day go-live.

Write 1 sentence that sums up the most common and important characteristics

Mid-sized UK companies that handle lots of invoices and want to save time, avoid mistakes, and get cleaner, faster month-ends.

Their new name	Invoice-Heavy Mid-Market.	Tag this label in CRM to build tailored messages.
----------------	---------------------------	---

What 3 actions could I immediately take to find more Ideal Clients?	1. Co-host two short webinars with popular accounting-software partners 2. Offer a 30-day pilot to qualified prospects 3. Message 100 CFOs/Controllers on LinkedIn with a 90-second results video and one-click pilot booking.	
---	--	--