OVERVIEW

Ideal Client Profile

Diagnose the situation, choose a target and capture the first insight.

CLIENT / ACCOUNT	COACH	SESSION DATE

PURPOSE

Use this coaching worksheet to identify the revenue teams with an urgent coaching need. Leave with a one-page ideal client profile that can be tested in real, buyer-respectful work.

WHY THIS MATTERS

Start with client interviews, sales performance data and coach discovery notes. Watch for treating every sales team as equally suitable. Review qualified inquiry rate as a learning signal, not a promised result.

SELF-ASSESSMENT / SCORE EACH DIMENSION 1 TO 10

LOOK FOR	NOW /10	GOAL /10
01 Buyer fit		
02 Problem clarity		
03 Proof quality		
04 Differentiation		
05 Message recall		
06 Commercial relevance		

QUICK REFLECTION

Which dimension is the best starting point for this focus: identify the revenue teams with an urgent coaching need?

DEEP WORK I

Ideal Client Profile

Use actual evidence. Separate what happened from what you assume it means.

01 / CURRENT PICTURE

01 Review client interviews, sales performance data and coach discovery notes. What observed moment shows the need to identify the revenue teams with an urgent coaching need?

02 What did the buyer, seller or sponsor actually say or do? Record one concrete example.

02 / THE LEVER

03 When you try to identify the revenue teams with an urgent coaching need, which step breaks down first, and in what context?

04 What assumption are you making that the evidence does not yet support? How could you check it?

03 / PRACTICE & TEST

05 Coach question: Which type of revenue team would gain least from your approach?

06 How could you replace treating every sales team as equally suitable with a fair, specific and testable move?

DEEP WORK II + WORKSHEET

Ideal Client Profile

Build a usable artifact, then pressure-test it with a real-world scenario.

07 What must a one-page ideal client profile contain to help the user identify the revenue teams with an urgent coaching need? Name the first two decisions it supports.

08 Where might treating every sales team as equally suitable show up? How will you notice it and adjust before a client or buyer is affected?

EVIDENCE AUDIT

Complete five rows while building a one-page ideal client profile. Use only approved, non-sensitive examples.

SOURCE	WHAT HAPPENED	WHAT IT SUGGESTS	NEXT CHECK
01			
02			
03			
04			
05			

BRING INTO THE NEXT COACHING CONVERSATION

Ask: Which type of revenue team would gain least from your approach? Check: qualified inquiry rate.

ACTION PLAN

Ideal Client Profile

Move from insight to observable practice, with a realistic measure and review date.

FROM INSIGHT TO ACTION

STEP	PRACTICE ACTION	BY WHEN
01 REVIEW	Inspect one real example from client interviews, sales performance data and coach discovery notes.	
02 BUILD	Draft a one-page ideal client profile using that evidence.	
03 REHEARSE	Practise the move with a coach or peer and request one correction.	
04 TEST	Try it in one relevant, permissioned buyer or client interaction.	
05 ADAPT	Review qualified inquiry rate and change one thing.	

SUCCESS METRIC

Leading signal: qualified inquiry rate. Choose a baseline and a realistic target; outcomes are not guaranteed.

MILESTONES / WHEN WILL YOU LOOK FOR EVIDENCE?

CHECKPOINT	WHAT YOU EXPECT TO SEE	REVIEW DATE
DAY 30		
DAY 60		
DAY 90		

SUPPORT NEEDED

MAIN RISK

COMMITMENT & FIELD NOTES

Ideal Client Profile

Agree the next move, track what happened and return with evidence.

MY COMMITMENT

In the next relevant situation, I will use a one-page ideal client profile to identify the revenue teams with an urgent coaching need.

IF THIS GETS IN THE WAY, I WILL...

PARTICIPANT SIGNATURE

DATE

WEEKLY FIELD NOTES

WEEK	SITUATION	WHAT I TRIED	EVIDENCE + ADJUSTMENT
01			
02			
03			
04			

IN THE BUYER OR CLIENT'S WORDS / USE PERMISSIONED, NON-SENSITIVE WORDING

NEXT REVIEW

ACCOUNTABILITY PARTNER

Keep buyer and client data private. No results are guaranteed.