



Warm Email Prospecting for Freelancers

Ideal Client Worksheet

Remember: You don't have to have just one ideal client profile (ICP). You can have two or more. However, make sure to complete one of these worksheets for each of your ICPs.

Company/Organizational Attributes:

What Industry or industries does this client work in? (Could be more than one.)

Describe some of the key business attributes (e.g., the organization's size, types of products/services sold, markets served, are they in growth mode? Is it a new venture?):

Level of financial stability: _____

Preferred location/region: _____

Personal Attributes:

Their position or title: _____

Gender and age range: _____

How does this person view you and what you bring to the table? What's their perception of using solo professionals in your field?

Have they worked with a solo professional in your field before? If so, why did they end the relationship? Or, if they're still working with a competing service provider, will you be part of a larger outsourced team for this client?

How good of a communicator is he/she? How do they prefer to communicate with you?

How easy is it to work with him/her? _____

What specific types of work would this client hire you for? How would the nature of your work grow or evolve over time—and how rapidly (if at all)?

How many projects would you deliver for this client every year? Or, how many hours per month or week would you work for this client? _____

How big a part does this client want you to play in their department or organization? In other words, are you brought in for lower-level work, for more strategic projects and consulting, or a mixture of both? (Be specific here.)

How price-sensitive is he/she? _____

Describe their level of sophistication, knowledge and expertise with regards to the work you do.
