

Ideal client implementation scorecard.

Defining an ideal client profile and building your experience, marketing, processes, and team with them in mind can provide valuable benefits to your firm and clients. Rate how strongly you agree or disagree with the following statements to identify opportunity in your firm.

RANK YOUR FIRM'S SEGMENTATION VIA IDEAL CLIENT		CURRENT SCORE	IDEAL SCORE
		Score 1 - 5, with 5 = I strongly agree and 1 = I strongly disagree	
Client experience	We understand the needs of our clients, based upon experience and research, and can reasonably predict their future challenges. We have aligned our firm to meet the needs of our clients creating stronger relationships.		
Competitive advantage	We understand our ideal clients, and are able to market our services demonstrating our competitive advantage over more generalist financial advisory firms.		
Business analytics	We maximize revenue based on repeatable processes, minimal one-off projects, targeted marketing, proven growth engines, competitive pricing, and profitably analysis.		
Staffing and resources	Our staff understands our ideal clients' needs and how we service them. Our technology and operational processes complement our offering by making us more efficient and client focused.		



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