|  |  |
| --- | --- |
|  | Client classification |

Assign a percentage of value for each factor. That number should reflect the factor’s importance to you. Then characterize each factor as either required or desired. Supplement with additional factors when applicable.

|  |  |  |
| --- | --- | --- |
| **Factor** | **% value (out of 100)** | **Required or desired** |
| Annual fees |  |  |
| Realization rate |  |  |
| Payment history |  |  |
| Financial health |  |  |
| Likelihood of needing additional firm or strategic partner services |  |  |
| Niche relevance |  |  |
| Likelihood of referring new clients |  |  |
| Easy to deal with and willing to follow advice |  |  |
| Other |  |  |
| Other |  |  |
| Other |  |  |

Use the information to rate each of your existing clients in a simple “A”, “B” and “C” client rating system. Armed with this information, allocate your time and resources accordingly.