

More Clients Preparation

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## Ideal Clients

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TechMentor's ideal client is a professional business that is in search of a solution (database, Excel macro, training course) that will help them automate and simplify their processes and thus achieve at least a 100% boost in productivity.

The ideal client is a small to medium size business which employs anywhere from 5 to 75 people, or it may be a similarly sized department of a much larger business. This business relies on personal computers and electronic tablets to get its job done.

The ideal client will have a **sponsor**, **project manager**, and multiple **users** who are all excited about the solution TechMentors will create. Tom will usually meet with the sponsor and project manager at the beginning of the project to get an idea of the project's scope. During the development phase Tom will collaborate most often with the project manager, and occasionally with users to get their input and to see how they work, thus enabling him to tailor the automated solution to their needs and desires. Ideally, at the end of the project, Tom will meet again with the sponsor and project manager to review the project and discuss needs for ongoing support, and possibly identify other projects that would have positive benefits for the company.

### The Sponsor

The sponsor is the individual who authorizes the project. This is usually a C-level executive or a department head. This person is well-educated with an MBA, CPA or similar degree. They are typically between 30 and 60 years old, and earn anywhere from \$150K to \$300K per year. They have a high level of integrity and a good work

ethic. They typically work 50 to 60 hours per week but still make time for family and other worthwhile activities.

The sponsor cares about his or her people and wants to make the world a better place for them, their clients, the community at large and for his or her own family.

This sponsor is also a visionary who sees how things could be and they are passionate about finding solutions that will get them there. Consequently, they don't see the project as an expense, but as an investment that will provide a high return.

Most sponsors can be found attending functions with professional associations like the American Institute of CPAs as well as community organizations like Kiwanis, the Lion's club, or the BYU Management Society. They also can be found helping their church or community by serving on a board of directors for a worthwhile project.

### **The Project Manager**

The project manager is the key person with whom Tom will work to produce the solution. They will manage the project, set priorities, and make and clarify decisions relative to the project. They too see the value this project will bring to the company and they are open to additional suggestions about how things can be improved. The project manager will also be the project's subject-matter-expert and will generally be available by phone or email when Tom has questions.

The project manager is college educated and usually holds a bachelor's degree. More important they are very computer literate and they enjoy working with programs like Microsoft Excel. They are typically between 25 and 50 years old, and earn anywhere

from \$75,000 to \$150,000 per year. They too have a high level of integrity and typically work 45 to 55 hours per week and enjoy spending time with their family and serving in their community.

### **The Users**

Users demographics and psychographics vary. They are usually young, at least 20 years old, but some may be over 50. Many are full-time employees putting in 40 hours a week, while some work part-time. The ideal user is computer literate. Most have at least a high-school diploma, while some may have advanced degrees. Most will have an hourly rate between \$20 and \$40 per hour, but some may command an annual six-figure income. Many users are single, while some have a spouse and children. Ideally each user will have a good work ethic, be trustworthy, and care about the success of the business.

## Demographic and Psychographic Table

	<b>Demographic</b>	<b>Psychographic Interests</b>
Sponsor	<ul style="list-style-type: none"> <li>• Fluent in English</li> <li>• Male or Female</li> <li>• 30 to 60 years old</li> <li>• Married with children</li> <li>• Computer literate</li> <li>• Annual Income: \$150K - \$300K</li> </ul>	<ul style="list-style-type: none"> <li>• Entrepreneurial opportunities</li> <li>• Business industry</li> <li>• Wealth creation / preservation</li> <li>• Professional associations</li> <li>• Career</li> <li>• Family</li> <li>• Community / church</li> </ul>
Project Manager	<ul style="list-style-type: none"> <li>• Fluent in English</li> <li>• Male or Female</li> <li>• 25 to 50 years old</li> <li>• Married with children</li> <li>• Very computer literate especially with spreadsheets</li> <li>• Annual Income: \$75 – \$150K</li> </ul>	<ul style="list-style-type: none"> <li>• Career</li> <li>• Management</li> <li>• Technology</li> <li>• Family</li> <li>• Community / church</li> </ul>
User	<ul style="list-style-type: none"> <li>• Fluent in English</li> <li>• Male or Female</li> <li>• 20+ years old</li> <li>• Single or married Some have children</li> <li>• Computer literate</li> <li>• Annual Income: \$40K - \$300K</li> </ul>	<ul style="list-style-type: none"> <li>• Career</li> <li>• Technology</li> <li>• Family</li> <li>• Community / church</li> </ul>

## Ultimate Outcome

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TechMentors helps small business professionals who are frustrated with or need to get more out of business software like Microsoft Office. I help them turn time-wasting tasks into quick automated solutions that save time and money, provide insights and enable action.

## Core Client Question

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How can I leverage the power of my existing computers to reduce time-wasting tasks, save money, and provide helpful data analytics so I can produce outstanding results with my existing workforce?

## **Success Story**

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Prior to working with me one client spent two days per month tediously re-entering and manipulating Survey Monkey data into Excel so they could produce charts for Power Point presentations. I created an Excel macro that now imports the data and produces the Power Point presentation in six minutes.

## **Values**

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**Integrity:** Dr. Henry Cloud has written that integrity is the courage to meet the demands of reality<sup>1</sup>. Religious leader and renowned heart surgeon Dr. Russel M. Nelson, and after speaking about the structural integrity of the heart, said that integrity may be defined as being “unimpaired” and “incorruptible”.<sup>2</sup> I strive to be a man of integrity, I strive to be honest and incorruptible, especially in my communication and in my billing. To that end I need to communicate the following to new clients who may not have a realistic expectation regarding the realities of developing code:

As a programmer I write code and charge for my time. I acknowledge that this is an iterative process that can take longer than expected. It usually includes initially writing imperfect code which is then tested and rewritten multiple times until it meets my understanding of the demands of the customer’s reality.

How does integrity impact my life and business? It requires that I acknowledge to myself those times when debugging code has been a fruitless exercise of spinning my wheels. In such situations, I cannot in good conscience charge a client for all the time I

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<sup>1</sup> From the subtitle of Henry Cloud’s book Integrity: The Courage to Meet the Demands of Reality

<sup>2</sup> See <https://speeches.byu.edu/talks/russell-m-nelson/integrity-heart/>

have put in. I have therefore reassessed what is fair to both the client and myself and have reduced the bill accordingly.

**Humility, meekness, and respect** – No one wants to pay money to hear a professional brag or show off. Neither do they want to hire a trainer who, with contempt, rolls their eyes at a student who asks a question. I therefore strive to “check my ego at the door” and be the caring respectful trainer who can relate to the student and/or client who finds technology confusing. I want to be their “guide on the side” not the “know-it-all sage on the stage.”

**Synergy** – I believe that two heads are better than one, and therefore I can learn much from my students and my consulting clients. I acknowledge that they are the experts on the task they are trying to accomplish. I therefore value their participation and communication in both the classroom and in the process of creating automated solutions.

**Excellence** – I want to deliver a user-friendly quality training and/or consulting product. I want my students and consulting clients to be raving fans who are excited about the results they have received. I therefore strive for excellence, even when that means taking more time to test a solution to make sure it is right. I also encourage my clients to test what I have given them and let me know of any issues they find.

## **Business Vision**

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Dear Friend,

Here it is, 2030, and you have asked me about my life and career as a self-employed professional, and you want to know if it is as good as it appears. In all honesty and hopefully with appropriate humility and thankfulness for the blessings that my Heavenly Father has given me, I can say life has been wonderful. Because I have been self-employed since 2010, I have had the freedom to serve my family, clients, community and church as I see fit. It is very satisfying to oversee your own schedule rather than having to wonder if the boss will be annoyed with another request for time off.

However, please do not misunderstand. Being self-employed does not mean I can be irresponsible with my time. I have a financial and moral obligation to meet my clients needs in the time frame I have committed to. Meeting such commitments requires integrity, self-control, good planning, and sacrifice. It also requires that I skillfully communicate and negotiate with clients to ensure that deadlines are not missed and expectations are fulfilled.

Back in 2020 I had two problems. The first was being too busy, and the second was not being busy enough. Let me explain. Often, I would have multiple client projects on my plate at the same time. For weeks at a time I would rush around, working hard, and hoping, wondering and praying that I would be able to get all the work done. Then after I finally got it all done, I had little to do because I had failed to do any marketing while I was so busy. So, I would grudgingly gird up my loins and go do some marketing so I could again provide for my family.

In April 2020 I solved my problem by joining a nine-month program that taught me how to balance working in the business (client work) with working on the business (marketing). The program taught me how to systematize and streamline the marketing activities. This made the marketing enjoyable and made it so I could quickly and easily follow through with potential clients. Consequently, the drudgery associated with marketing was gone, and I gladly developed and kept a balance between client work and marketing. That balance has helped me thrive both in my business and in the other aspects of my life.

## **High-End, Outcome-Based Program**

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*I have a confession – I have doubts about the following being the high end, outcome based program I should pursue. I would love your input.*

**What is the name of the program?**

Excel Dashboard Mastery Class

**What is the Ultimate Outcome of the program?**

Students will be able to create advanced Excel dashboards using formulas, functions, filters, slicers, controls, and macros.

**How is it different from other programs in my marketplace?**

Includes courseware, recorded video training, weekly class sessions, homework assignments and one on one help. Trainer has over 20 years experience teaching Excel classes in a fun way that is customized to the needs of the students.

**What is the structure of the program?**

Students attend a once a week workshop every week for 12 weeks. Students receive a PDF book with exercises and sample files. Students have homework assignments that they must do prior to each class. The homework is then turned in to a person who will keep them accountable (boss, friend, etc.). Students can send questions in to the instructor who will anonymously share answers with the whole class via the website.

**Where to find ideal clients?**

Word of mouth, email newsletter / blog, etc.

**How will this help my business?**

This program will give me:

- Questions from students that I can address in a weekly blog post
- Content which can be sold
- Help fill the pipeline for consulting clients

## **Strengths and Weaknesses**

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### **Strengths**

- Ambitious
- Authentic
- Caring
- Candid
- Creative
- Dedicated
- Dependable
- Enthusiastic
- Flexible
- Honest
- Kind
- Logical
- Motivated
- Optimistic
- Open Minded
- Persistent
- Responsible
- Self Controlled
- Trustworthy
- Versatile
- Team Player
- Great communicator
- Leader
- Computer Skills
- Manage Time
- Desire to help
- Seek for deep understanding
- Listen
- Quick to ask for clarification
- Excellent teacher / presenter
- Good facilitator
- Good planner

### **Weaknesses**

- Slow to understand / interpret data
- Slow to observe others and their feelings
- Poor estimator of time needed to do a task
- Misinterpret people
- Do not get all the social queues
- Too technical especially with instructions and people
- Prone to participate too much
- Poor negotiator
- Easily hurt emotionally
- Poor delegator
- Too detail oriented
- Hesitant to market self / business
- Indecisive
- Hesitant

## **Commitment**

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I will do the work and be ready for each class. I will set aside at least half-a-day to a full-day or more each week to make a difference. This may require saying no to some opportunities – in other words I will proactively put long term success over short-term gain.