

Ideal Customer Rating System

Developed by Grace LaConte, MS, RHIA
of LaConte Consulting

About This Tool

Finding the right customers can be a difficult and frustrating task. How can you tell which customers are right for your business? What qualifies someone as "Ideal"? Is there a way to evaluate customers instead of relying on a "gut feeling"?

The answers to these questions will become clear with the Ideal Customer Rating System. This tool combines quantity (numbers) and quality (emotions and experiences) to help you discover which of your current and past customers get the best results and generate the highest profit. The result is a percentage that shows which customers are the best fit for you and your business.

This tool was inspired by the "Qualifying System Template" developed by Alan Weiss, PhD (author of *The Consulting Bible* and *Million Dollar Launch*).

Instructions

1. Review the Questions

On the left, you will see twenty questions about your work, your customer, the qualities of your customer, and the benefits you receive from serving them. Start by considering these questions. Do they accurately reflect your goals for the business? If not, adjust as needed.

EXAMPLE Ideal Customer Rating System															
	Customer 1		Customer 2		Customer 3		Customer 4		Customer 5		Customer 6		Customer 7		
	Weight	Amount													
The Work															
1. Is working with this customer challenging and interesting?	8	3	72	7	56	7	56	10	80	8	64	8	64	10	80
2. Does this customer work move me toward my ultimate Goals ?	10	8	80	5	50	8	80	3	30	7	70	7	70	10	100
3. Is the customer 100% clear on the Objectives they can expect?	10	8	80	5	50	8	80	3	30	5	50	7	70	10	100
4. Is the customer 100% clear on the Value they receive?	10	8	80	5	50	8	80	3	30	8	80	7	70	10	100
5. Do I feel confident that I can help the customer succeed ?	9	8	72	3	27	3	27	3	27	8	72	6	54	10	90
The Customer															
6. Has the customer successfully used this service before ?	7	6	42	3	21	5	35	10	70	5	35	2	14	6	42
7. Is the customer an early adopter ?	5	7	35	5	35	6	30	8	40	3	15	3	15	7	35
8. Does the customer treat me as a partner in their care?	10	10	100	10	100	3	30	10	100	3	30	6	60	10	100
9. Is the customer results oriented ?	8	10	80	3	24	8	64	3	24	10	80	4	32	8	64
10. Do I trust the customer?	9	8	72	7	63	7	63	3	27	7	63	6	54	8	72
Customer Qualities															
11. Is the customer willing to hear the truth even if it's not pleasant?	8	3	24	10	80	3	24	8	64	10	80	7	56	10	80
12. Is the customer being completely honest with me?	8	9	72	10	80	10	80	8	64	3	24	8	64	10	80
13. Does the customer accept full responsibility for their actions?	10	10	100	3	30	3	30	3	30	8	80	7	70	3	30
14. Is the customer excited about our work together?	6	10	60	8	48	3	18	10	60	8	48	7	42	3	18
15. Is the customer confident & aware of their strengths ?	7	3	21	7	49	8	56	3	21	3	21	1	7	8	56
Benefits to Me															
16. Does this customer add value to my brand and image?	7	7	49	4	28	7	49	10	70	6	42	3	21	10	70
17. Are the profit margins high?	8	8	64	4	32	8	64	10	80	3	24	6	48	3	24
18. Does the work utilize my talents and strengths ?	10	3	30	8	80	8	80	10	100	8	80	7	70	3	30
19. Does the work require minimal resources , time, and effort?	7	3	21	8	56	3	21	8	64	10	70	6	42	3	21
20. Is my labor intensity kept to a minimum?	7	3	21	6	42	3	21	3	21	3	21	6	42	8	56
Total Weighted Score			1409		1153		1330		1504		1271		965		1434
Total Score Possible			1540		1540		1540		1540		1540		1540		1540
>80% = Acceptable; >90% = Ideal			86%		70%		81%		92%		78%		59%		91%

Here are the questions included in this tool:

The Work

- 1 Is working with this customer **challenging** and interesting?
- 2 Does this customer work move me toward my ultimate **Goals**?
- 3 Is the customer 100% clear on the **Objectives** they can expect?
- 4 Is the customer 100% clear on the **Value** they receive?
- 5 Do I feel confident that I can help the **customer succeed**?

The Customer

- 6 Has the customer successfully **used this service before**?
- 7 Is the customer an **early adopter**?
- 8 Does the customer treat me as a **partner** in their care?
- 9 Is the customer **results oriented**?
- 10 Do I **trust** the customer?

Customer Qualities

- 11 Is the customer willing to **hear the truth** even if it's not pleasant?
- 12 Is the customer being completely **honest** with me?
- 13 Does the customer **accept full responsibility** for their actions?
- 14 Is the customer **excited** about our work together?
- 15 Is the customer confident & **aware of their strengths**?

Benefits to Me

- 16 Does this customer **add value** to my brand and image?
- 17 Are the **profit margins** high?
- 18 Does the work utilize my **talents and strengths**?
- 19 Does the work require **minimal resources**, time, and effort?
- 20 Is my **labor intensity** kept to a minimum?

On the next page, you'll see the Ideal Customer Rating System close-up.

EXAMPLE Ideal Customer Rating System

	Customer 1 Mike R.	Customer 2 Joe W.	Customer 3 Megan A.	Customer 4 Kyle M.	Customer 5 Christy E.	Customer 6 Ron Q.	Customer 7 Laura P.	
The Work								
1. Is working with this customer challenging and interesting?	8	7	7	10	8	8	6	10
2. Does this customer work move me toward my ultimate Goals ?	10	5	8	9	7	7	7	10
3. Is the customer 100% clear on the Objectives they can expect?	10	5	8	9	5	5	7	10
4. Is the customer 100% clear on the Value they receive?	10	5	8	9	8	7	7	10
5. Do I feel confident that I can help the customer succeed ?	9	9	9	9	8	6	10	10
The Customer								
6. Has the customer successfully used this service before ?	7	3	5	10	5	2	6	6
7. Is the customer an early adopter ?	5	5	6	8	9	3	7	7
8. Does the customer treat me as a partner in their care?	10	10	9	10	9	6	10	10
9. Is the customer results oriented ?	8	9	8	9	10	4	8	8
10. Do I trust the customer?	9	7	7	9	7	6	8	8
Customer Qualities								
11. Is the customer willing to hear the truth even if it's not pleasant?	8	10	9	8	10	7	10	10
12. Is the customer being completely honest with me?	8	10	10	8	9	8	10	10
13. Does the customer accept full responsibility for their actions?	10	9	9	9	8	7	9	9
14. Is the customer excited about our work together?	6	8	9	10	8	7	9	9
15. Is the customer confident & aware of their strengths ?	7	7	8	9	9	1	7	8
Benefits to Me								
16. Does this customer add value to my brand and image?	7	4	7	10	6	3	10	10
17. Are the profit margins high?	8	4	8	10	3	6	9	9
18. Does the work utilize my talents and strengths ?	10	8	8	10	8	7	9	9
19. Does the work require minimal resources , time, and effort?	7	8	9	8	10	6	9	9
20. Is my labor intensity kept to a minimum?	9	6	9	9	9	6	8	8
Total Weighted Score								
	1409	1153	1330	1504	1271	985	1494	
Total Score Possible								
	1640	1640	1640	1640	1640	1640	1640	
	86%	70%	81%	92%	78%	59%	91%	
>80% = Acceptable, >90% = Ideal								

2. Pick a Weight

The next column is labeled "Weight Amount." This refers to the importance on which you place each of the questions. In each highlighted cell, choose a number between 1 and 10, with 10 being "extremely important" and 1 being "not important at all."

For example, in question 1 ("Is the work challenging and interesting?"), you may feel very strongly that a challenging workplace is important. For this, you would pick a high number (such as 9). If you don't believe that a question has very high importance, you would choose a lower number (like 4).

EXAMPLE Ideal Customer Rating System										
	Customer 1	Customer 2	Customer 3	Customer 4	Customer 5	Customer 6	Customer 7			
	Mike R.	Joe W.	Megan A.	Kyle N.	Christy E.	Ron Q.	Laura P.	Weight	Weight	Weight
The Work										
1 Is working with this customer challenging and interesting?	8	9	7	5	7	10	8	6	10	8
2 Does this customer work move me toward my ultimate Goals ?	10	8	8	5	8	9	7	7	7	10
3 Is the customer 100% clear on the Objectives they can expect?	10	8	8	5	8	9	5	5	7	10
4 Is the customer 100% clear on the Value they receive?	10	8	8	5	8	9	8	8	7	10
5 Do I feel confident that I can help the customer succeed ?	9	8	7	5	9	8	7	7	6	10
The Customer										
6 Has the customer successfully used this service before ?	7	6	4	3	5	10	7	5	2	6
7 Is the customer an early adopter ?	5	7	3	5	6	8	4	9	3	7
8 Does the customer treat me as a partner in their care?	10	10	10	9	9	10	9	9	6	10
9 Is the customer results oriented ?	8	10	8	9	7	10	10	4	4	8
10 Do I trust the customer?	9	8	7	7	6	9	7	6	6	8
Customer Qualities										
11 Is the customer willing to hear the truth , even if it's not pleasant?	8	9	7	10	8	9	10	8	7	10
12 Is the customer being completely honest with me?	8	9	7	10	8	9	10	8	7	10
13 Does the customer accept full responsibility for their actions?	10	10	9	9	9	9	8	8	7	9
14 Is the customer excited about our work together?	6	10	8	8	9	10	8	8	7	9
15 Is the customer confident & aware of their strengths ?	7	9	6	7	8	9	8	7	7	8
Benefits to Me										
16 Does this customer add value to my brand and image?	7	7	4	4	7	10	7	6	3	10
17 Are the profit margins high?	8	8	6	4	8	10	8	3	4	9
18 Does the work utilize my talents and strengths ?	10	9	8	8	8	10	8	8	7	9
19 Does the work require minimal resources , time, and effort?	7	9	8	8	9	10	8	7	6	9
20 Is my labor intensity kept to a minimum?	7	9	6	4	9	9	8	7	6	8
Total Weighted Score		1409	1153	1330	1504	1271	965			1434
Total Score Possible		1640	1640	1640	1640	1640	1640			1640
>80% = Acceptable; >90% = Ideal		86%	70%	81%	92%	78%	59%			91%

© 2019 LaConte Consulting
<https://laconteconsulting.com>



3. Label Your Customers

Then, consider your current and past customers. Pick twenty Customers whom you most enjoy serving. In the [Name] cell, write the customer's name or an alias.

If you want to analyze more than 15 customers, simply copy the Template sheet (right-click on Template, pick "Move or Copy," and click the box "Make a Copy," which keeps the formatting intact). Continue your analysis on the new page.

EXAMPLE Ideal Customer Rating System															
	Customer 1		Customer 2		Customer 3		Customer 4		Customer 5		Customer 6		Customer 7		
	Weight	Amount	Weight	Amount	Weight	Amount	Weight	Amount	Weight	Amount	Weight	Amount	Weight	Amount	
The Work															
1. Is working with this customer challenging and interesting?	8	3	72	7	56	7	56	10	80	8	64	8	64	10	80
2. Does this customer work move me toward my ultimate Goals ?	10	8	80	5	50	8	80	3	30	7	70	7	70	10	100
3. Is the customer 100% clear on the Objectives they can expect?	10	8	80	5	50	8	80	3	30	5	50	7	70	10	100
4. Is the customer 100% clear on the Value they receive?	10	8	80	5	50	8	80	3	30	8	80	7	70	10	100
5. Do I feel confident that I can help the customer succeed ?	3	8	72	3	24	3	24	3	24	8	72	6	54	10	80
The Customer															
6. Has the customer successfully used this service before ?	7	6	42	3	21	5	35	10	70	5	35	2	14	6	42
7. Is the customer an early adopter ?	5	7	35	5	25	6	30	8	40	3	15	3	15	7	35
8. Does the customer treat me as a partner in their care?	10	10	100	10	100	3	30	10	100	3	30	6	60	10	100
9. Is the customer results oriented ?	8	10	80	3	24	8	64	3	24	10	80	4	32	8	64
10. Do I trust the customer?	3	8	72	7	56	7	56	3	24	7	56	6	48	8	64
Customer Qualities															
11. Is the customer willing to hear the truth even if it's not pleasant?	8	3	72	10	80	3	24	8	64	10	80	7	56	10	80
12. Is the customer being completely honest with me?	8	3	72	10	80	10	80	8	64	3	24	8	64	10	80
13. Does the customer accept full responsibility for their actions?	10	10	100	3	30	3	30	3	30	8	80	7	70	3	30
14. Is the customer excited about our work together?	6	10	60	8	48	3	24	10	80	8	48	7	42	3	18
15. Is the customer confident & aware of their strengths ?	7	3	21	7	49	8	56	3	24	3	24	1	7	8	56
Benefits to Me															
16. Does this customer add value to my brand and image?	7	7	49	4	28	7	49	10	70	6	42	3	21	10	70
17. Are the profit margins high?	8	8	64	4	32	8	64	10	80	3	24	6	48	3	24
18. Does the work utilize my talents and strengths ?	10	9	90	8	80	8	80	10	100	8	80	7	70	3	30
19. Does the work require minimal resources , time, and effort?	7	3	21	8	56	3	24	8	64	10	80	6	48	3	24
20. Is my labor intensity kept to a minimum?	7	3	21	6	42	3	24	3	24	3	24	6	48	8	56
	Total Weighted Score		1403		1153		1330		1504		1271		965		1494
	Total Score Possible		1640		1640		1640		1640		1640		1640		1640
	>80% = Acceptable; >90% = Ideal		86%		70%		81%		92%		78%		59%		91%

© 2019 LaConte Consulting
<https://laconteconsulting.com>



4. Rate the Customer

Next, go back to the first column. Read each question; and in the boxes under the customer's name, type a number from 1 to 10 that corresponds to whether you agree (a number of 6 to 10) or disagree (a number from 1 to 5).

For example: question 1 ("Is the work challenging and interesting?") might be very true for Customer 1. You might pick a high number (such as 10). Customer 2, on the other hand, might not be as motivating; so you would choose a lower number (such as 4). After you answer all questions, a percentage will appear in the bottom column.

EXAMPLE Ideal Customer Rating System																	
	Customer 1		Customer 2		Customer 3		Customer 4		Customer 5		Customer 6		Customer 7				
	Weight	Amount															
The Work																	
1	8	3	72	7	56	7	56	10	80	8	64	8	64	10	80		
2	10	8	80	5	50	8	80	9	90	7	70	7	70	10	100		
3	10	8	80	5	50	8	80	9	90	5	50	7	70	10	100		
4	10	8	80	5	50	8	80	9	90	8	80	7	70	10	100		
5	9	8	72	9	81	9	81	9	81	8	72	6	54	10	90		
The Customer																	
6	7	6	42	3	21	5	35	10	70	5	35	2	14	6	42		
7	5	7	35	5	35	6	30	8	40	9	45	3	15	7	35		
8	10	10	100	10	100	9	90	10	100	9	90	8	80	10	100		
9	8	10	80	9	72	8	64	9	72	10	80	4	32	8	64		
10	9	8	72	7	63	7	63	9	81	7	63	8	64	8	72		
Customer Qualities																	
11	8	9	72	10	80	9	72	8	64	10	80	7	56	10	80		
12	8	9	72	10	80	10	80	8	64	9	72	8	64	10	80		
13	10	10	100	9	90	9	90	9	90	8	80	7	70	9	90		
14	6	10	60	8	48	9	54	10	60	8	48	7	42	9	54		
15	7	9	63	7	49	8	56	9	63	9	63	1	7	8	56		
Benefits to Me																	
16	7	7	49	4	28	7	49	10	70	6	42	3	21	10	70		
17	8	8	64	4	32	8	64	10	80	3	24	6	48	9	72		
18	10	9	90	8	80	8	80	10	100	8	80	7	70	9	90		
19	7	9	63	8	56	9	63	8	56	10	70	6	42	9	63		
20	7	9	63	6	42	9	63	9	63	9	63	8	56	8	56		
Total Weighted Score				1409		1153		1330		1504		1271		965		1434	
Total Score Possible				1640		1640		1640		1640		1640		1640		1640	
				86%		70%		81%		92%		78%		59%		91%	

© 2019 LaConte Consulting
<https://laconteconsulting.com>



5. Review the Scores

Once you fill in all the answers for each Customer, the table will automatically calculate a total based on the weight you picked in Step #2. To the right of each Customer score is a column called "Weight." This number is the value of the Customer score, multiplied by the Weighted Score for each line.

At the bottom of each Customer column is a cell labeled "Total Weighted Score." This automatically adds up the weighted scores for all twenty questions.

Beneath this is a cell called "Total Score Possible." If you were to selected a "perfect score," with a weight of 10 for each question and a score of 10 for each customer, the highest total would be 1,640. You can compare each customer's total against this to see how highly they rank.

EXAMPLE Ideal Customer Rating System															
	Customer 1 Mike R.		Customer 2 Joe W.		Customer 3 Megan A.		Customer 4 Kyle N.		Customer 5 Christy E.		Customer 6 Ron Q.		Customer 7 Laura P.		
	Weight	Amount	Weight	Amount	Weight	Amount	Weight	Amount	Weight	Amount	Weight	Amount	Weight	Amount	
The Work															
1	Is working with this customer challenging and interesting?	8	3	72	7	56	10	80	8	64	7	70	10	80	
2	Does this customer work move me toward my ultimate Goals ?	10	8	80	5	50	8	80	3	30	7	70	10	100	
3	Is the customer 100% clear on the Objectives they can expect?	10	8	80	5	50	8	80	3	30	5	50	7	70	
4	Is the customer 100% clear on the Value they receive?	10	8	80	5	50	8	80	3	30	8	80	7	70	
5	Do I feel confident that I can help the customer succeed ?	9	8	72	3	27	3	27	8	72	6	54	10	90	
The Customer															
6	Has the customer successfully used this service before ?	7	6	42	3	21	5	35	10	70	5	35	2	14	
7	Is the customer an early adopter ?	5	7	35	5	25	6	30	8	40	9	45	3	15	
8	Does the customer treat me as a partner in their care?	10	10	100	10	100	9	90	10	100	9	90	6	60	
9	Is the customer results oriented ?	8	10	80	9	72	8	64	9	72	10	80	4	32	
10	Do I trust the customer?	9	8	72	7	63	7	63	9	81	7	63	6	54	
Customer Qualities															
11	Is the customer willing to hear the truth , even if it's not pleasant?	8	9	72	10	80	9	72	8	64	10	80	7	56	
12	Is the customer being completely honest with me?	8	9	72	10	80	10	80	8	64	9	72	8	64	
13	Does the customer accept full responsibility for their actions?	10	10	100	9	90	9	90	10	100	8	80	7	70	
14	Is the customer excited about our work together?	6	10	60	8	48	9	54	10	60	8	48	7	42	
15	Is the customer confident & aware of their strengths ?	7	9	63	7	49	8	56	9	63	9	63	1	7	
Benefits to Me															
16	Does this customer add value to my brand and image?	7	7	49	4	28	7	49	10	70	6	42	3	21	
17	Are the profit margins high?	9	8	72	4	32	8	64	10	80	3	24	6	48	
18	Does the work utilize my talents and strengths ?	10	9	90	8	80	8	80	10	100	8	80	7	70	
19	Does the work require minimal resources , time, and effort?	7	9	63	8	56	9	63	8	56	10	70	6	42	
20	Is my labor intensity kept to a minimum?	7	9	63	6	42	9	63	9	63	6	42	8	56	
Total Weighted Score				1409			1153			1330			1504		
Total Score Possible				1640			1640			1640			1640		
				86%			70%			81%			92%		

>80% = Acceptable; >90% = Ideal

© 2019 LaConte Consulting
<https://laconteconsulting.com>  LaConte Consulting

Finally, the colored box at the bottom is the percentage of the Customer's Total Weighted Score, divided by the highest possible number. These boxes have conditional formatting. Boxes with 70% or below will turn **red**. Boxes with a score below 80% will turn **gold**. And boxes with a score above 90% will turn **green**.

Any Customer with a score of 90% or above can be considered your Ideal Customer, because they most closely fit the criteria you selected.

EXAMPLE Ideal Customer Rating System															
	Customer 1		Customer 2		Customer 3		Customer 4		Customer 5		Customer 6		Customer 7		
	Weight	Amount													
The Work															
1 Is working with this customer challenging and interesting?	8	9	72	7	56	7	56	10	80	8	64	8	64	10	80
2 Does this customer work move me toward my ultimate Goals ?	10	8	80	5	50	8	80	9	90	7	70	7	70	10	100
3 Is the customer 100% clear on the Objectives they can expect?	10	8	80	5	50	8	80	9	90	5	50	7	70	10	100
4 Is the customer 100% clear on the Value they receive?	10	8	80	5	50	8	80	9	90	8	80	7	70	10	100
5 Do I feel confident that I can help the customer succeed ?	9	8	72	9	81	9	81	9	81	8	72	6	54	10	90
The Customer															
6 Has the customer successfully used this service before ?	7	6	42	3	21	5	35	10	70	5	35	2	14	6	42
7 Is the customer an early adopter ?	5	7	35	5	25	6	30	8	40	9	45	3	15	7	35
8 Does the customer treat me as a partner in their care?	10	10	100	10	100	9	90	10	100	9	90	6	60	10	100
9 Is the customer results oriented ?	8	10	80	9	72	8	80	9	72	10	100	4	32	8	80
10 Do I trust the customer?	9	8	72	7	63	7	63	9	81	7	63	6	54	8	72
Customer Qualities															
11 Is the customer willing to hear the truth even if it's not pleasant?	8	9	72	10	80	9	72	8	64	10	80	7	56	10	80
12 Is the customer being completely honest with me?	8	9	72	10	80	10	80	8	64	9	72	8	64	10	80
13 Does the customer accept full responsibility for their actions?	10	10	100	9	90	9	90	9	90	8	80	7	70	9	90
14 Is the customer excited about our work together?	6	10	60	8	48	9	54	10	60	8	48	7	42	9	54
15 Is the customer confident & aware of their strengths ?	7	9	63	7	49	8	56	9	63	9	63	1	7	8	56
Benefits to Me															
16 Does this customer add value to my brand and image?	7	7	49	4	28	7	49	10	70	6	42	3	21	10	70
17 Are the profit margins high?	8	8	64	4	32	8	64	10	80	3	24	6	48	9	72
18 Does the work utilize my talents and strengths ?	10	9	90	8	80	8	80	10	100	8	80	7	70	9	90
19 Does the work require minimal resources , time, and effort?	7	9	63	8	56	9	63	8	56	10	70	6	42	9	63
20 Is my labor intensity kept to a minimum?	7	9	63	6	42	9	63	9	63	9	63	6	42	8	56
Total Weighted Score			1409		1153		1330		1504		1271		965		1494
Total Score Possible			1640		1640		1640		1640		1640		1640		1640
>80% = Acceptable; >90% = Ideal			86%		70%		81%		92%		78%		59%		91%

Applying the Results

Once you have filled in the data for each Customer, you can review the colored boxes. Consider how many customers have a score of 80% or above (**gold** and **green** cells). Then think about which Customers had the lowest scores (**red** cells)

Are you surprised at these results? Does the score differ from your perception of these Customers, or does it align with what you already knew? What type of unique needs do your Ideal Customers share? Now that you know who your Ideal Customers are, how will you develop a marketing strategy to attract them?

Contact

If you have any questions about this tool or suggestions for improvement, please send Grace an e-mail at laconteconsulting@gmail.com.

You can also visit <https://laconteconsulting.com> for more tools and resources.