



Audience Avatar Worksheet

Client Name: Make Taxes Fair

Date:

The audience avatar is one of the most influential and useful tools in all of marketing, but it should also help guide your product development and improvement efforts. We will use this worksheet to take a deep dive into exactly who our target audience is and how we can best help them.

This worksheet will take some thought, and will never quite be finished. This will be a living document that you will use for years to come. This will enable your business to reach the people who need your help and change the way they think about their problems and about your solution. Used properly, this will make customers feel like you are reading their minds in the ads and content that you produce.

Remember: You don't need a broad target audience, **you need a well-defined target audience.**

This is the most important step in being able to charge whatever you want and still attract business.

Messaging

1. The biggest result I can help my client/customer achieve is:

Get clarity and know specific actions to take around their taxes and what they can do to mitigate their tax bill.

Eliminate confusion, anxiety, worry, etc around taxes.

Relief from both emotional and financial cost of taxes

2. Describe the best client you've ever had/your ideal client if you are just starting

(What made them pleasant to work with? What made them the perfect fit for your service? What made them get good results? etc)



They listened, asked questions, and took immediate action.

Coachable, Teachable. Actionable. – They were engaged.

They took ownership mentality and they took instructions and ran with them. They started to notice that their business was running more smoothly as a result of implementing tax strategies.

They have tried other solutions in the past.

\$150k+ on annual tax bill

Naturally happy and appreciative people

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Most difficult: want nitty gritty details of the tax code

3. What's the biggest problem your ideal client has?

(Describe it in rich detail. Financial. Emotional. Pain.)

Organization. They are holding onto their own books and bearing the stress of wearing all the hats. Their books and records are behind and so they needlessly hold onto the stress and anxiety caused by uncertainty.

Overpaying taxes, but most significantly overpaying on the emotional cost of taxes.

4. What frustrates your ideal client the most?

(what is the source of their frustration? Why do they feel that way? What else does it make them feel?)

Not keeping their own money

Tax professionals don't have answers when they ask questions, give non-concrete answers.

Getting promised the moon but then nothing happens. Quarterly meetings don't happen or aren't actually used to strategize and lower tax bills (i.e. just forecasting taxes rather than attacking them)

Current tax professional works harder for IRS than for them.



Overwhelmed. They have so much on their plate that adding even small taxes feels like a significant burden "Where will I find the time" "when am I going to do that?"

Not knowing if they are doing it right, Worried the IRS might come back and audit them and find something wrong.

Having no way to get clarity.

5. What are THE four to five steps for them to achieve success and get results?

Schedule Discovery Call with Make Taxes Fair

Gather and organize records

Let us create a Tax Strategy Roadmap for you

Follow the roadmap we give you using actionable and detailed checklists and tools

Maintain and regularly attack your tax bill by paying attention to the strategies that you have and let us continually find new strategies for you.

Stop leaving Uncle Sam a "tip"!
Our 3 step system to legally kick IRS butt!

PLAN
Dig deep & unlock tax savings strategies specific to your business using our CLEAR EDGE Framework

IMPLEMENT
Take ACTION & integrate your tax savings into your business with 3 months of ACTION

ATTACK
With a tax strategy foundation in place proactively ATTACK your taxes to continuously evaluate your business for new tax savings opportunities

"Friends Don't Let Friends Overpay The Government!"
We average 50% in tax savings per client!
Find out how much you can save!

QR CODE

MakeTaxesFair.com



6. What keeps your perfect client awake at night (worrying, fearful, anxious)?

Taxes being wrong/Fear of being audited
Not knowing if they have funds to pay tax bill
Not knowing how much might owe at tax time
Feeling lost with conflicting or missing information

7. What humiliates/embarrasses your ideal client (moments they are trying to avoid)?

Asking a question that seems like they should know the answer to.
Finding out they have been doing their taxes wrong

They thought the answer they had was right but then they find out it wasn't

Not having funds to pay for the tax bill

8. What is the cost of staying where they are right now? How bad can things become if they don't fix it?

Overpaying in taxes. Giving precious resources to government

They continue to bear the emotional burden. Every minute they spend worrying about things they can't find answers to is a minute not spent building their business and their legacy. The extra stress causes many of them to crumple and go under.

9. What is their most urgent, pressing crisis they have to have solved right away (the real pain they're facing, the thing they need fixed immediately)?

They are putting off taxes until deadlines instead of investing the time to build a system and stop it from being a recurring problem.

"I owe money to the government and don't know how to pay it"

"I've got to to it right and its due soon"

10. What are the top 3 things that frustrate your perfect clients on a daily basis (is it doing things they don't want to do? people? circumstances? chores?)?

Not having clarity around what they should be doing.

Keeping financial records up-to-date and organized

It's a complex world when you're dealing with taxes, financial, legal, and its not in their zone of genius. I need help, I don't know how to get it, and I can't find people who can explain it in ways I understand.

11. What does your perfect client want more than anything else?

Clarity. Specific next steps. Confidence in their direction and resolution.

12. Explain what you would do if you were in their situation - high level steps. (Share 'what' you would do, not 'how' to do it.):

1. Seek understanding and knowledge
2. Determine if this is something I can confidently tackle myself or do I need an expert?
3. Find someone who understands you and can provide proof that they know for real and not just giving 90% correct info.
4. Listen to them, follow-through on your end, and trust what they say



13. What is the BIGGEST MISTAKE your perfect client is making right now (related to the problem you solve)?

Waiting until its urgent. Procrastinating.
Inaction. DIY with no guidance.

14. What are the “sacred cows” or false/limiting beliefs that your potential clients hold towards your products or services?

Tax savings comes in the form of checks and boxes that were missed on their returns.

“My CPA has me covered” – Most CPAs are ‘happy historians’ and reporting history vs examining potential strategies.

They need a CPA who is willing to play in the grey area – They need to know that the tax code has plenty of opportunity that is entirely legal and on the up-and-up.

That there is a lot of grey area – more so they just need to know the rules

15. What does your perfect client complain about when they’re with their friends or family (i.e. “not enough money,” “not enough time,” “don’t know how to do something,” etc)?

The IRS and the Government taking their money
Their tax professional who can't give them the right answers
The internet lacking proper answers
The lack of answers to their questions
The complexity of the system