

WEBSITE FUNDAMENTALS



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Use this worksheet to ensure your website leverages best practice fundamentals to optimize your positioning, messaging and appeal to potential clients.



Build Your Ideal Client Avatar

Clearly identify (and speak to) your ideal client's characteristics and pain points.



DEMOGRAPHICS

Ex. Age 50+, \$1M+ Investable Assets, Low Expenses With Zero Debt.

PAIN POINTS

Ex. Tsunami of RMDs, Surviving Spouse Lacks Expertise, Worries About Making Mistakes.



Craft Your Above The Fold Billboard

1 What You Do & Who It's For (Headline):

Write a clear, concise statement that describes your services and target audience.

2 Key Marketing Message (Sub-Headline):

Summarize the primary benefit or outcome your clients can expect.

3 Call-to-Action (CTA):

What's the #1 action you want prospects to take? Write it out.

4 Review & Refine:

Read your billboard elements aloud. Revise as needed until they pass the "That's me. That's what I want. How do I start?" test.



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Flip the Script on Your Client

List 5-7 questions or concerns that are top-of-mind for your ideal clients.

How to start:

- 1 Reflect on your initial client meetings. What questions or concerns arise?
- 2 Think about your ongoing client relationships. What issues do clients bring up repeatedly?
- 3 Consider your ideal client's daily life. What financial worries might be on their mind?
- 4 Identify the pain points your services specifically address.



Design Your Unique Discovery Process

1 What It Is (Intention/Result):

Describe the outcome of the Discovery Call in one sentence.

2 Who It's For (3 Qualifiers):

Identify your ideal client identity, values, and mindset.

3 How It Works (1-3 Steps):

Outline your unique discovery process in 3 steps.

