Ideal Client Profile

Example: Rick Delgado, Owner of Delgado Plumbing & Heating

Prepared for: Ledger & Co. Bookkeeping (a fictional bookkeeping firm)

EXAMPLE ONLY. Every person, company and detail in this document is fictional and was created to demonstrate the Ideal Client Profile process. Figures are illustrative assumptions, not research or statistics.

About the seller (interview answers)

Because this is a demonstration, the discovery interview was answered with reasonable assumptions for a fictional bookkeeper.

- **What we sell:** Monthly bookkeeping, payroll coordination and plain-English monthly reports for small home services companies, so the owner knows their numbers and is ready for tax time.
- **Who buys:** Founder-owners of plumbing, HVAC, roofing, landscaping and cleaning companies with roughly 5–25 employees. The owner decides; a spouse, office manager or the company's CPA often influences.
- **Buying triggers:** A surprise tax bill, a letter from the IRS or state, a CPA who says the books are a mess, a cash crunch despite a busy season, a spouse who stops doing the books, or a loan or truck purchase that needs clean financials.
- **Current alternatives:** The owner doing QuickBooks at night, a spouse or relative, a part-time office person, a once-a-year cleanup by the CPA, or nothing until tax season.
- **Objections:** "I can't afford it," "nobody knows my business like I do," "I got burned by a bookkeeper before," "I'll catch up this winter," "my CPA handles that."
- **Personal motivations:** Time with family, not being embarrassed in front of the CPA or the bank, protecting the crew's paychecks, building something worth selling one day.
- **Where they spend time:** Facebook groups for trade owners, LinkedIn (lightly), YouTube business channels for contractors, trade associations and supply-house counters, local chamber events, podcasts on the truck.

1. Profile overview

The ideal client is the founder-owner of a small, founder-led home services company: someone who started as the best tech on the truck and is now running a business of 8–15 people. They are the final decision-maker on hiring a bookkeeper. Their spouse, who often did the books in the early years, is a strong influencer, and their CPA can either recommend or block the decision.

Key traits

- **Builder at heart:** Started in the field and still jumps on calls when the crew is short. Measures a good day by jobs completed, not reports read.
- **Fiercely independent:** Prefers to handle things personally. Slow to hand over control of money.
- **Busy and reactive:** Runs the day from his phone and truck. Paperwork waits until night or the weekend.
- **Cash-conscious:** Watches the bank balance more than the P&L. Feels rich in summer and nervous in winter.
- **Loyal to the crew:** Feels personally responsible for every paycheck. Would rather skip his own pay than miss payroll.
- **Quietly embarrassed by the books:** Knows QuickBooks is months behind. Avoids conversations with his CPA until he must.
- **Family-driven:** Built the company to give his family a better life. Resents how much family time the business takes.
- **Trust-based buyer:** Buys on referrals and gut feel. Wants to talk to a real person who gets the trades.

Named persona

Field	Detail
Name	Rick Delgado
Age	44
Location	Outskirts of a mid-sized Midwestern city
Title	Owner, Delgado Plumbing & Heating
Company	Founder-led plumbing and HVAC company, 12 employees, 7 service trucks, residential service and replacement
Education	High school, trade school, licensed master plumber
Experience	About 20 years in the trade; started the company out of his garage with one van

Demographics

- **Household income:** Comfortable on paper but uneven; depends heavily on the season and on what the business can spare
- **Family:** Married to Lisa, who handled the books for the first several years and recently went back to work as a school nurse. Two kids: a daughter in high school sports and a son in middle school
- **Lifestyle:** Up before six, on the road most of the day, dinner with the family when he can make it, then emails and QuickBooks at the kitchen table. Coaches his son's team when the schedule allows

Psychographics

- **Values:** Hard work, doing the job right the first time, taking care of his people, honesty with customers
- **Motivations:** Give his kids more than he had, keep the crew employed year-round, build a company that could run without him and maybe be sold someday
- **Main challenges:** Books months behind, no clear view of margins by job type, cash swings between seasons, a tax bill he can't predict, payroll stress
- **Emotional drivers:** Fear of letting his family and crew down, pride in what he has built, embarrassment about the state of the books, exhaustion

Buying triggers and objections

What makes him act:

- A tax bill much larger than he expected, or penalties for late payroll deposits
- A letter from the IRS or the state
- His CPA telling him the books need a costly cleanup before the return can be filed
- Lisa saying she can't do the books anymore
- Applying for a loan or financing a new truck and being asked for current financials
- A busy month that somehow still leaves the bank account short

Objection	How to answer
"I can't afford a bookkeeper."	Compare the monthly cost with what late fees, missed deductions and nights at the kitchen table already cost him. Start with a catch-up and a simple monthly plan.
"Nobody knows my business like I do."	He keeps every decision. The bookkeeper handles entry, reconciliation and reports, and explains them in plain English.
"I got burned before."	Offer a clear scope, a set monthly check-in and read-only access he can review anytime.
"I'll catch up this winter."	Ask how last winter went. The cost of waiting is another season of guessing.
"My CPA handles that."	Most CPAs prefer clean monthly books. Offer to coordinate directly with his CPA.

Powerful language

- **The kitchen-table shift:** The second job he works every night after the trucks are parked.
- **Busy but broke:** A packed schedule that still leaves the account thin by the fifteenth.
- **The shoebox:** Receipts in the truck console, the glovebox and a box in the garage.
- **Knowing your numbers:** Being able to say which jobs make money before he bids the next one.

Persona summary

Rick Delgado is a 44-year-old master plumber who turned a one-van garage operation into Delgado Plumbing & Heating, a 12-person plumbing and HVAC company. His wife Lisa used to do the books but has gone back to nursing, and the bookkeeping has slid months behind. Rick is busy, proud and cash-conscious; he worries about the next tax bill, whether payroll will clear in a slow month and whether his jobs are as profitable as they look. He wants his evenings back and to finally understand his numbers, but he will only hand the books to someone he trusts, who speaks his language and keeps him in control.

2. Challenges and deepest fears

Challenges

Challenge	Impact
Books are months behind	He makes pricing, hiring and purchasing decisions without current numbers.
No clear margins by job type	He can't tell whether water heaters, service calls or full replacements actually make money.
Seasonal cash swings	Strong summers mask thin winters; he scrambles to cover payroll and supplier bills.
Payroll and payroll taxes	Deposits and filings are easy to miss, and penalties add up quietly.
Time	Hours of evening bookkeeping take him away from his family and leave him exhausted.

Deepest fears

Fear	Impact
A tax bill he can't pay	He'd have to drain savings, borrow or set up a payment plan, and feel like a failure.
Trouble with the IRS	Letters, penalties or an audit, and the shame of having let it happen.
Missing payroll	Letting down the people who trust him, and losing good techs he can't replace.
Working hard for nothing	Finding out that some of his busiest work barely breaks even, or loses money.
Missing his kids growing up	Trading games, dinners and weekends for a laptop at the kitchen table.

Consequences if unaddressed

Rick keeps guessing at prices and cash, pays avoidable penalties and costly year-end cleanups, carries constant low-level stress, and risks a cash crisis in a slow season. The business stays

dependent on him, harder to grow and harder to sell, and the evenings he can't get back keep going to QuickBooks.

3. Journal entry

Tuesday, November 4, 11:52 p.m.

Kitchen table again. Lisa went to bed an hour ago and said "don't stay up all night," which is what she says every night now. Emma's volleyball team played in the semifinal tonight. I watched the last set on Lisa's phone from a crawl space on Maple because Ray called in sick and somebody had to finish the job.

I opened QuickBooks to catch up on October and realized I never finished September. There's a pile of supply-house receipts next to my coffee and another one in the truck. I honestly don't know if that big boiler job made us money or if I just moved a lot of cash around.

What keeps me up is the tax bill. Last April it was way more than I expected and I had to pull from the account we were saving for the kids. I still don't know what this year's will be. And payroll is Friday. December is always slow. Twelve people are counting on me, and some of them have kids too.

Lisa used to keep all of this straight. She never complained, but I know she's relieved she doesn't have to anymore. I can't keep asking her, and I'm clearly not doing it either. Every night I'm here, I'm not with them.

I'm good at running jobs. I'm not good at this, and I'm tired of pretending I'll catch up next month. I need someone who actually understands a business like mine to get the books current, keep them that way and just tell me straight where we stand, so I can stop guessing and go to bed.

4. Prospecting kit

Where to find them

- LinkedIn: owners who list their trade company as their employer, often with sparse profiles
- Facebook groups for plumbing, HVAC, roofing and contractor business owners
- Local trade associations, chamber of commerce events and supply-house open houses
- Referrals from CPAs, insurance agents, equipment lenders and business coaches who serve the trades
- Google Business Profiles of local service companies with 5–25 employees

LinkedIn search filters

- **Titles:** Owner, Founder, President, Co-Owner, General Manager
- **Industries:** Construction; Plumbing, Heating and Air-Conditioning; Facilities Services; Landscaping Services; Building and Cleaning Services

- **Company size:** 2–10 and 11–50 employees
- **Geography:** Within the bookkeeper's service region, or nationwide for a remote firm
- **Keywords:** "plumbing," "HVAC," "heating and cooling," "roofing," "landscaping," "residential service"

Outreach openers

1. **Connection note:** Hi Rick, I work with owners of small plumbing and HVAC companies who'd rather spend their evenings with their families than in QuickBooks. Would be glad to connect.
2. **First message:** Thanks for connecting, Rick. Quick question I ask a lot of trade owners: when you're bidding a job, do you know what that type of job actually made you last quarter, or is it more of a gut call? No pitch, just curious how you handle it.
3. **Follow-up:** Hi Rick, this time of year a lot of owners I talk to are bracing for winter and wondering what the tax bill will look like. If it'd help, I'm happy to share the simple monthly checklist we use to keep owners ahead of both. Just say the word.

Discovery questions

4. When did you last look at a profit and loss statement you trusted, and what did it tell you?
5. How did last year's tax bill compare with what you expected, and what did you have to do to cover it?
6. Walk me through a typical week of bookkeeping. Who does it, when, and what gets pushed aside to make room for it?

5. Content that speaks to them

LinkedIn posts

Post 1: Fear: a tax bill he can't pay

Hook: The scariest number in a contractor's year isn't a bid. It's the tax bill.

Story: An owner told me his April bill was so much bigger than expected that he had to pull from the money he'd saved for his kids. The business had a great year. He just didn't know what it would cost him until it was too late to plan. Monthly books turn that April surprise into a number you've been setting aside all year.

Call to action: If you'd like to know your number before April, send me a message.

Hashtags: #smallbusiness #contractors #bookkeeping

Post 2: Challenge: no clear margins by job type

Hook: Busy isn't the same as profitable.

Story: One plumbing owner was sure his full replacements were his best work. When his books were current, he found they were barely breaking even once you counted labor and callbacks,

while his service calls quietly carried the company. Same crew, same trucks, very different decisions once he could see it.

Call to action: Which of your jobs actually make you money? Comment and I'll share how to find out.

Hashtags: #plumbing #hvac #knowyournumbers

Post 3: Fear: missing payroll

Hook: Every owner I know would skip their own paycheck before they'd miss the crew's.

Story: That's admirable, but it shouldn't come to that. Most payroll scares in the trades aren't about a bad business; they're about a slow month nobody saw coming. Current books and a simple cash forecast show you December in October, while there's still time to plan.

Call to action: If winter cash keeps you up at night, let's talk.

Hashtags: #homeservices #payroll #smallbusinessowner

Post 4: Fear: trouble with the IRS

Hook: Nobody starts a plumbing company to open letters from the IRS.

Story: Late payroll deposits and missed filings are rarely about dishonesty. They happen when the owner is also the dispatcher, the closer and the bookkeeper. Getting the books current, and keeping them that way, is the quiet fix that stops most of those letters before they're written.

Call to action: Behind on filings? Message me; no judgment, just a plan.

Hashtags: #contractorlife #taxes #bookkeeping

Post 5: Fear: missing his kids growing up

Hook: The second shift nobody talks about: the kitchen table at 11 p.m.

Story: A roofing owner told me he'd watched his daughter's game on his wife's phone from a job site, then gone home to do QuickBooks until midnight. He wasn't behind on effort. He was doing two jobs. Handing off the books gave him his evenings back, and he still makes every decision.

Call to action: What would you do with your evenings back? Tell me below.

Hashtags: #familybusiness #tradesbusiness #worklifebalance

Letter from Rick to Ledger & Co. Bookkeeping

Dear Ledger & Co.,

My name is Rick Delgado. I own Delgado Plumbing & Heating. We're twelve people and seven trucks, and I'm proud of what we've built. But I'll be honest: our books are a mess.

My wife used to keep them, and now she's back to nursing, so it's me at the kitchen table at midnight trying to catch up. I'm months behind. I don't really know which of our jobs make money, I got blindsided by last year's tax bill, and every slow winter I worry about payroll.

I'm reaching out because I need someone who understands a business like mine. I don't want to give up control; I want to finally understand my numbers. I want my books current every month, a plain-English report I can actually read, someone who'll talk to my CPA so I don't have to, and a heads-up before the tax bill, not after.

Mostly, I want my evenings back. If you can help me stop guessing and spend more nights with my family, I'd like to talk.

Rick Delgado
Owner, Delgado Plumbing & Heating

Saved reference

Rick Delgado, 44, owner of Delgado Plumbing & Heating (12 employees): a busy, proud trade founder whose books are months behind, who fears the tax bill and missed payroll, and who wants his evenings back and to finally know his numbers.