Customer Profile Worksheet

Getting the most out of your marketing efforts and dollars means targeting a specific audience. So who is your ideal customer? Where and how do they get information on products and services? What is the best way to cultivate relationships and move them through the sales funnel?

This worksheet can help you create a detailed profile of your ideal customer that will help you develop specific strategies so that you convert sales and get the best ROI.

Sample Customer Profile

Company: Sam's Pool Installation and Repair

Demographics

Age: 43

Location: Huntsville, AL

Gender: Female

Education Level: College degree

Occupation: Hospital administration

Income: $80,000

Marital Status: Married

Children: 3

PsychoGraphics

Goals: Wants to continue to advance professionally while also enjoying the finer things in life. She has a live hard/play hard attitude.

Values: Family, integrity and compassion

Hobbies: Golf, book club and wine tastings

Sources of Information

Books: *Lean In: Women, Work and the Will to Lead, Untamed*

Websites: Buzzfeed, Instagram, CNN

Magazines: People, Time

Other: Often asks friends and neighbors for recommendations.

Challenges

Pain Points: She has a hectic schedule and limited windows of opportunities to meet and discuss projects. She is looking for value and someone that she can trust to diagnose problems and provide accurate and transparent price estimates.

Worries/Concerns: Worries about not doing enough research on companies and ending up paying too much for services.

Objections: Wants to see a portfolio and customer reviews before committing to a company.

Create Your Own Customer Profile

Fill out this worksheet and create your own ideal customer profile. You may want to complete more than one in order to better understand the different people that comprise your target audience.

Demographics

Age:

Location:

Gender:

Education Level:

Occupation:

Income:

Marital Status:

Children:

PsychoGraphics

Goals:

Values:

Hobbies:

Sources of Information

Books:

Websites:

Magazines:

Other:

Challenges

Pain Points:

Worries/Concerns

Objections: