Ideal Customer Profile

Creating an Ideal Customer Profile will assist in focusing marketing efforts on prospects with the greatest likelihood of becoming good customers — and to avoid wasting valuable resources on those that aren't a good fit.

The best way to determine an ideal client is by taking a look at your existing customers. With your customer summary report and ideal client chart, map out the general characteristics of your top 20 customers.

Keep in mind as you're completing the chart that it is important to consider customers who may not spend the most dollars with you, but are loyal, give referrals, and are fans! These types of customers are valuable too!

Please complete both charts.

Ideal Customer Profile Chart Overview:

Customers: We do not need the actual customer names; this is for your reference. You can use acronyms and generals like, "client 1", "client 2", etc.

# of Employees: If you're not sure of the exact number, a range is ok. Consider pulling their user list from your RMM tool.

Industry: Use this list to help categorize your customers' industries:
- Manufacturing, Law, Healthcare, Banking, Education, Financial, Insurance, Construction, Real Estate, Government, Retail, Etc.
- Type of Business: Non-Profit, Entrepreneur, Home-based, Online, Franchise

Average Revenue: If you're not sure of the exact number, a range is ok.

Location: This can be based on distance from your office, particular section of town/city, county, etc.

# of Years as a Customer: If you're not sure of this information, your accounting or PSA package should give you an idea when they were first invoiced.

What Do They Purchase: This can be a list of broad services. For example, if they buy computers from you, you can simply list computers. (examples: Managed Desktop (pro level), Managed Server, Antivirus Subscription, Spam Protection, etc.)

Average Spent Per Month: Compute from customer summary monthly sheet.

Average Spent Per Year: Copy from yearly customer summary monthly sheet.

Have they ever referred you? Given a testimonial?: For these two questions if you're not sure, leave blank.

Ideal Customer Profile Chart Part 1

Customer	# of Employees	Industry	Type of Business	Average Revenue	Location	#Years as Customer

Ideal Customer Profile Chart Part 2

Customer	What do they purchase	Average Spent Per Month	Average Spent Per Year	Have they referred you?	Given Testimonial?