

Ideal Client Persona **Worksheet**

For growing profitable revenue
in a B2B environment.



Ideal Client Persona Worksheet



Demographics:

Title _____

Position Characteristics _____

Ownership _____

Growth Phase _____

Company Size _____

Annual Revenue _____

Number of Employees _____

Industries _____

Geography _____

Psychographics:

Attitudes (to business & life) _____

Values (quality, price, results, etc.) _____

Quality Standards (highest, getting by, etc.) _____

Honors Commitments _____

Communication Level _____

Loyalty (long term relationships?) _____

Ethics _____

Purchasing Characteristics:

Products or services purchased _____

Their ideal vendor characteristics (responsiveness, price, e-commerce, etc.) _____

Frequency of purchases (monthly, JIT, one-time, etc.) _____

Buying motivations (one time need, disposable replenishment, etc.) _____

Buying requirements (bid, PO, etc.) _____

What you want them to say about your product or service after they buy _____

To grow profitable revenue, I recommend that you do more of what's working and less of what's not. A key to achieving this state is knowing the characteristics of your ideal client. Actually, not just the characteristics, but also their demographics, psychographics, and purchasing patterns. In other words – their persona.

There is a tendency in the world of marketing to create multiple pages documents that go into extreme detail when describing a persona. For the purposes of growing profitable revenue in a B2B environment, I believe that there is an equally effective, simpler approach. This **Ideal Client Persona Worksheet** is a great place to start.

In a B2B environment you need to focus on the critical few, key characteristics of your ideal client. Knowing how many children they have or whether they prefer to shop at Nordstrom instead of Target, isn't relevant to growing profitable B2B revenue. It is essential to know what their job title is, where they are located, what they buy, how they buy, when they buy, and why they buy.

Additional questions you need to answer include:

- What are the characteristics of their job position? Are they a decision maker, etc.
- What is the ownership of the company? Privately held, etc.
- Where are they on the business lifecycle curve? Start-up, mature, etc.
- What are your ideal client's attitudes toward business and life? Analytical, lifelong learner, etc.
- Do they honor their commitments to themselves and others?
- What do they value in a vendor?
- Why do they buy? What is going on in their organization at the moment of decision that causes them to buy your product or service?
- What are their buying requirements? Online, PO, etc.
- If you could capture a quote from them about your product or service after they've bought it, what would you like them to say?

You must be able to answer these questions to effectively sell your products and services. Without this information you will be forced to take a shotgun approach to sales that is long, difficult and most often unsuccessful.

When you capture this information on the **Ideal Client Persona Worksheet**, you create the essential persona of the clients you want to attract. These are not necessarily your existing clients. (Although, hopefully some of them come close to this description.) You are creating your *ideal* client persona. These are the clients that you want more of to grow your business.

The **Ideal Client Persona** will inform your product or service recommendations, sales approach, and timing. In addition, your entire company will thank you for growing your client base with more great customers. Morale and team engagement will increase along with profits.

You are very welcome to email me at elizabeth@resultist.com or call me directly at **206-361-4562** with any questions or thoughts.