**Customer Profile Instructions & Template**



**Profile Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

This template is to be used to help create customer profiles for your business. It can refer to both current customers and what ideal customers might look like and influence how you sell and market to them. This template can be used for B2C and B2B businesses.

**DEMOGRAPHICS**



**1** customer?

What is the age range of this type of

*\*Could be a specific age, range of ages, or not be relevant.*

**2**

What is the typical gender of this type of customer?

*\*Could be male, female, both, or not relevant.*

**3** living situation (if any) of this type of

What is the geographic location/

customer?

*\*Could be a country, state, city, or neighborhood or not be relevant. Also might refer to the specific type of housing they live in or facility they work out of.*

**4** customer?

What is the race or ethnicity of this type of

*\*Could be one race/ethnicity, multiple, or not relevant.*

**5**

What is the occupation or job role of this type of customer?

*\*Could be a title, responsibility (important for B2B), or a category of jobs such as white-collar, middle-class, office, outdoor work, self-employed, etc. Also may not be relevant.*

**6**

What is the income level/spending capability of this type of customer?

*\*Could be a specific salary range, income status (Ex: high earner), or not be relevant.*

**7** customer?

What is the education level of this type of

*\*Could be college educated, non-college educated, doctor, licensed, certified, or not relevant.*

**8**

What is the marital status or family composition of this type of customer?

*\*Could be married, single, have children, no children, or not relevant.*

**9**

What is the religion or spirituality of this type of customer?

*\*Could be a specific religion, non-religious, or not relevant.*

**BEHAVIORS**

**1** and activities they might find themselves doing.

Describe some of their daily personal behaviors

*\*Could include things like taking care of children, volunteering, browsing the internet, and being on social media. Also could include interactions with your company such as that they frequently come into your store or restaurant, read your content, or browse your online shop.*

**2**

Describe some of their daily professional behaviors and activities they might find themselves doing.

*\*Very relevant for B2B. Could include things like data entry, attending seminars, in meetings, on sales calls, creating content, and reviewing financial books.*

**INTERESTS/PRIORITIES**

**1** interests.

Describe some of their personal hobbies and

*\*Could be everyday things like biking, fishing, favorite sports teams, and favorite TV shows.*

**2**

Describe some of the things that motivate them.

*\*Includes anything that would drive them to achieve goals. Could include things that are financially motivated, wanting to impress their superiors, and wanting to take care of their family.*

**3** decisions.

Describe some of their priorities in purchasing

*\*Think of things that influence a vendor or brand purchase decision such as low-cost, high value, high quality, fast service, friendly customer service, etc.*

**4**

Describe some concerns the customer may have about your business, product, or service.

*\*Think of things that customers evaluate like high cost, long wait*

*times, poor quality, etc.*

**5**

Describe what challenge will be mitigated or what problem will be solved by using your product or service.

*\*Think less literally and more about the motivations they have. Ex: They eat at my restaurant because they need a fast and healthy meal. Or they purchase from my software company because they need a reliable process automation tool to manage workflows.*

**MARKETING STRATEGY**



**1** channels based on the customer’s demographics,

Are there any particular communication

behaviors, and interests that would be better to use than others?

*\*Examples: Phone, email, social media, online, in-person, software application, word-of-mouth advertising, newspaper, etc.*

**2**

Based on the customer’s demographics, behaviors, and interests, is there any type of messaging that would best catch their attention or gauge interest from them?

*\*Examples: Focusing on price, promotional deals, rewards programs, emphasizing high quality, etc.*

**3**

Based on the customer’s demographics, behaviors, and interests, are there any design techniques, sales methods, or tactics that would be useful in your campaigns?

*\*Examples: Emotional selling, consultative selling approach, using images with people of the same demographic characteristics, etc.*

**CUSTOMER PROFILE CHART**

Using the information you’ve gathered above, take the ones relevant to your product or service and fill out the chart below:

|  |  |  |  |
| --- | --- | --- | --- |
|  | **[Customer Name]** | **[Customer Name** | **[Customer Name]** |
| **Demographics** | [Insert Relevant Demographic Information] | [Insert Relevant Demographic Information] | [Insert Relevant Demographic Information] |
| **Behaviors** | [Insert Relevant Behavior Information] | [Insert Relevant Behavior Information] | [Insert Relevant Behavior Information] |
| **Interests/Priorities** | [Insert Relevant Interest/Priority Information] | [Insert Relevant Interest/Priority Information] | [Insert Relevant Interest/Priority Information] |
| **Potential Communication Channels** | [List Potential Relevant Channels] | [List Potential Relevant Channels] | [List Potential Relevant Channels] |
| **Sales/Marketing Campaign Options** | 1. [Describe channel with messaging and methods] 2. [Describe channel with messaging and methods] 3. [Describe channel with messaging and methods] | 1. [Describe channel with messaging and methods] 2. [Describe channel with messaging and methods] 3. [Describe channel with messaging and methods] | 1. [Describe channel with messaging and methods] 2. [Describe channel with messaging and methods] 3. [Describe channel with messaging and methods] |