

B2B IDEAL CLIENT PROFILE TEMPLATE

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Defining your ideal client profile is one of the best tools you have at your disposal to help you make client-specific decisions by tracking your specific "ideal" client information, in order to give you the competitive advantage you need in today's marketplace.

IDEAL CLIENT PROFILE

DEMOGRAPHIC CHECKLIST

	What is your ideal client's company size?	
	What is the client's location / headquarters?	
	What are the products and services the clients provide?	
	What is the client's annual revenue?	
	What are the client's number, size, and location of branches?	
	What year was the client's business founded?	

PSYCHOGRAPHIC CHECKLIST

	Is the client the market leader?	
	Are they innovative / cutting-edge?	
	Are they liberal / conservative?	
	Are they environment-friendly?	
	Are they employee/family-friendly?	
	Are they fast-growing / adopting new ideas?	
	Are they stable / set in their ways?	

PERSONAL CLIENT PROFILES

DEMOGRAPHIC CHECKLIST

	AGE	
	GENDER	
	PROFESSION	
	EDUCATION LEVEL	
	HOUSEHOLD INCOME LEVEL	
	MARITAL STATUS	
	GEOGRAPHIC LOCATION	

PSYCHOGRAPHIC CHECKLIST

	CONSERVATIVE OR LIBERAL	
	CONFORMIST	
	ENVIRONMENT-FRIENDLY	
	SOCIALLY CONSCIOUS	
	POWER-WIELDING	
	FUN-LOVING	
	CUTTING-EDGE	
	TREND FOLLOWER	
	FASHION-FORWARD	
	FAMILY-ORIENTED	

<p>How many family members are typically in your client's customers' households?</p>	
<p>What hobbies and/or sports do the client's customers enjoy?</p>	
<p>What types of entertainment do the client's customers like? (movies, videogames, etc.)</p>	
<p>What publications do they subscribe to?</p>	
<p>What else do they enjoy doing in their free time?</p>	

IDEAL CLIENT CRITERIA RATING

Rank the order of importance the following criteria are for your ideal client.

	VERY IMPORTANT	SOMEWHAT IMPORTANT	NOT IMPORTANT	COMMENTS
PRICE				
QUALITY OF PRODUCTS OR SERVICES				
BRAND NAME RECOGNITION				
CUSTOMER SERVICE				
BROAD ARRAY OF SERVICES				
FRIENDLY STAFF ATTITUDE				
DISCOUNTS AND SALES				
ATTRACTIVENESS OF PACKAGING				
LOCATION				
APPEARANCE				
CONVENIENCE OF PRODUCT / SERVICE USE				
GUARANTEES / WARRANTIES				
TECHNICAL ASSISTANCE				
FLEXIBLE PAYMENT TERMS				

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