

Ideal Client/Customer Tool-Kit

# Defining your ideal client/ customer

## Contents

How to use this document	3
Define the target organisation	6
Define the individual	11
Next Steps	16

### About BoldType

BoldType is a Birmingham-based marketing and design consultancy that specialises in helping companies build strong reputations through positive and sincere stakeholder relationships. The team works with clients to deliver clear narratives about offerings that matter to their target audience.

[FIND OUT MORE ABOUT US](#)

# How to use this tool-kit for your business



## Why do you need to know who your ideal customer or client is?

**Armed with this insight, you can market your products or services to them with better precision.**

All too often, marketers and salespeople will say: “A customer is a customer. Any sale is a good sale”.

This is not a mindset we encourage or promote, and certainly not one that will support you growing your business effectively. In truth, there is a huge difference between ideal customers and less-than-ideal customers. It is important that as your business grows, the deals you are closing and retaining are worth the resources you have expended.

You do this by defining and selling to your **Ideal Customer Personas (ICP)**.

In addition to the obvious benefits, ideal customer personas also help align your marketing and sales teams on your **Core Value Proposition** and **Key Messaging** of your product or service. When your marketing and sales teams know exactly who they are talking to and how to talk to them, their efforts are much more successful.

### How to use this tool-kit

This tool-kit is split into two core parts:

1. Define the organisation (*for B2B companies only*)
2. Define the individual (customer/client) (*for B2B & B2C*)

We recommend working on this tool-kit with three or four colleagues from key parts of the business (e.g. senior leadership, sales, marketing, operations, delivery, etc.). This ensures that you receive a robust insight from their unique perspectives, challenges and opportunities to best tackle your ideal clients.

This tool-kit is fully interactive and you can use it to answer all the questions. If you have multiple target organisations and individual personas, you can duplicate the question sections for each one.

We recommend using flipcharts or whiteboards (physical or online) to collate your teams thoughts, ideas and responses to each question as you go progress. This will help you easily compare and contrast your answers.

### Need more help?

We are offering a **free 30 minute consultation** with a member of our BoldType team to assist you in both completing your personas, and, supporting and guiding you on the next steps to maximising their value to you and your company.

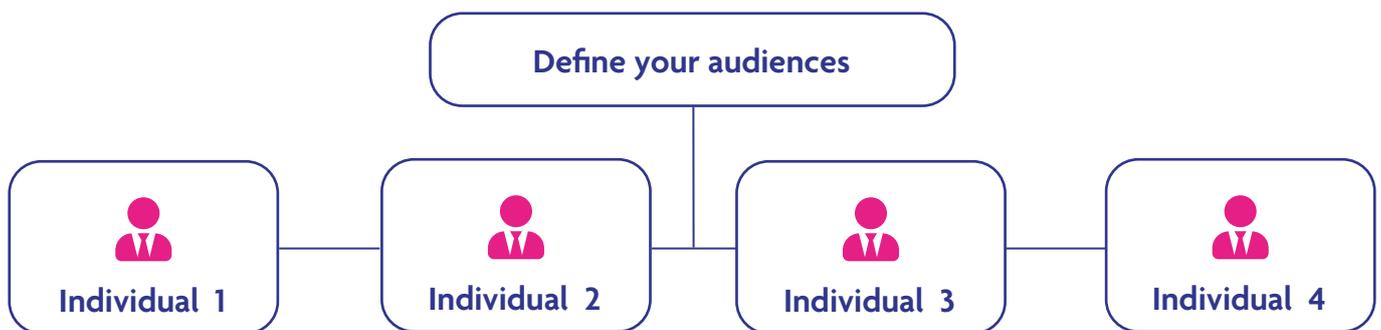


## The structure

### B2B example



### B2C example



## Define the target organisations

**N.B.** If you are a B2C company, jump straight to 'Define the Individual'

The first step is to to define the organisations (companies) you want to target by type and characteristics.

Before you complete the following questionnaire, you need to identify your target organisations. For example, if you are an automotive parts distributor:

1. Organisation A (Motor factors/ Wholesalers)
2. Organisation B (Garages)
3. Organisation C (Enthusiast Groups)
4. Etc.

## **Description / Type of organisation**

Describe your target organisation in a few words. They are the company or organisation that would buy/need your product and services the most.

## **Location**

If they have a physical location, where are they located? Major cities or towns? Are there multiple-branches? Where are they and which are you targeting? Regional? National? Worldwide?

## **Stage**

(i.e. how long have they been established?) Are they an existing, startup business? 1 year or 30 years?

## **Size**

How many employees?

## **Who are their customers?**

Who are the customers of your customer? What kind of people are they trying to serve with their solution?

## **What typical traits does this organisation have?**

Use single words or short phrases (no more than 2-5 words) to describe each of their characteristics. Are they organised or disorganised? Process-driven or results-driven? Cost-focussed? Quality-focussed? Understanding the traits will help when deciding how to target them.

## **What typical problems/challenges does this organisation face?**

Identifying their challenges present opportunities to demonstrate your value. Does this client need a specific kind of service? Do they have demanding sales targets? What do time and project management look like in the business? How tight is their cash flow?

## **What opportunities does this organisation have?**

Are they in a high growth sector? Are there opportunities for you to extend your product/service offerings to different departments?

## **How could you help this organisation?**

How can you fit into their company to help solve their problem or challenge?.

## **What's the main reason they would work with you?**

This is why they would buy from you over another company/competitor? Cost, service, quality, existing relationship, unique offering or value.

## **What's the main reason they would not work with you?**

Again, in relation to another supplier/your competitor. Have you worked with them before and let them down? Are you more expensive than competitors? Brexit? Have they have heard of you? Is your public reputation on a par with competitors?

## **What does this organisation need to make a decision?**

In order to use your services, what do you need to present to them? Costings, reviews, credibility, samples, demonstration etc.

## **What key messaging do we need to convey?**

Concisely define your USP, what are your company values, any promises you can deliver.

## Define the individual (customer/client)

This is the person who will end up buying your product. However, they might not be the end-user. For example, the IT department buying a new laptop or computer gear for the use of other employees - the end-users.

**Age**

**Gender** (e.g. 80% male/female)

**Job role / title**

**Location** (where are they located? Major cities or towns?)

## **Employment background**

If they have a physical location, where are they located? Major cities, town, or worldwide

## **Level of experience**

How many years have they been in the role? What previous jobs or roles ay have led to this current position? What is their influence in decision making for the company? Are they the ultimate decision maker? Do they vet options for the decision maker? If they are the latter, why do the need to be considered?

## **Personal Traits** (Behavioural profile)

Use single words or short phrases (no more than 2-5 words) to describe each of their characteristics. Are they organised or disorganised? Personable? Time poor? Cost-focussed? Down-to-earth? Understanding the traits will help when deciding how to target them.

## **Challenges/concerns**

What are their individual challenges and concerns in their role? Are they tasked with finding cost-savings or efficiencies? Do they have staff challenges or a lack of data, resources or knowledge in a particular area?

## **Opportunities**

What are the key benefits sought by this person? Career advancement? More wealth? Improved reputation? Job security?

## **How could you help them personally?**

How can your products or services enrich this person's life? Does it help them get the job done better? Does it help them achieve their lifestyle aspirations? Does it help diminish stress in their life? Do you help them look good to their line manager and improve their prospects for career advancement/raise?

## **What's the main reason they would work with you?**

Compared to a competitor, what attributes set you aside from the common customer experience? Ability to accommodate more ad-hoc requests? Quicker turn around? More attractive aesthetic? More comfort? Existing relationship?

## **What's the main reason they would not work with you?**

In comparison to a competitor, what would make this person choose against you? Distance? Location? Price? Ingredients? Values?

## **What does this individual need to make a decision?**

Do they need a track record of performance? Ingredient list? Certification of compliance? Case studies? Demonstration?

## **Are they the final decision maker or do they need to convince someone?**

If the user has to sell your products to their boss, you might need to equip them with all the information.

## **How do they like to be contacted?**

Via email, social media, phone, in person? Perhaps this might change as the prospect moves along your sales funnel?

## **What key messaging do we need to convey?**

Concisely define your USP, what are your company values, any promises you can deliver.

## Next Steps

Congratulations! Now that you have defined your ideal customer personas, you have taken the first step into building better relationships with those who matter to your business.

Now, the next steps are:

1. Design your ICP profiles to make them a strong and easy reference to your marketing and sales teams.
2. Identify what your core messages are and how you need to speak to them. This is the building block in resonating with your ideal customers.
3. Develop a strong brand analysis that will give you the clear navigation to you need for every marketing campaign and initiative.

The time has come to make your impact!

## 30 MINUTE FREE CONSULTATION

At BoldType, we can assist you in both completing your personas, and, supporting and guiding you on the next steps to maximising their value to you and your company.

Call **(0121) 724 0355** to arrange with the team!



# Need expert advice on developing you customer personas, brand analysis or key messaging?

Speak one of the BoldType experts....

Call (0121) 725 0355 or email [hello@boldtype.agency](mailto:hello@boldtype.agency)

(0121) 724 0355  
[www.boldtype.agency](http://www.boldtype.agency)  
[hello@boldtype.agency](mailto:hello@boldtype.agency)

The Moseley Exchange, 149-153 Alcester Road,  
Moseley, Birmingham, B13 8JP