[](https://www.smartsheet.com/try-it?trp=11795&utm_source=template-word&utm_medium=content&utm_campaign=B2B+Ideal+Customer+Profile-word-11795&lpa=B2B+Ideal+Customer+Profile+word+11795)**B2B IDEAL CLIENT PROFILE TEMPLATE**

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? |  |

|  |  |
| --- | --- |
| At what growth stage is the client?  *(startup, small business, growing, stable, or declining)* |  |
| What type of workforce does the client employ? |  |
| What is the client’s “company culture”? |  |
| What is the client’s “management style”? |  |
| What trade associations does the client belong to? |  |
| What publications does the client subscribe to? |  |
| Other 1 |  |
| Other 2 |  |

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 |  |

|  |  |
| --- | --- |
| How many family members are typically in your client’s customers’ households? |  |
| What hobbies and/or sports do the client’s customers enjoy? |  |
| What types of entertainment do the client’s customers like? (movies, videogames, etc.) |  |
| What publications do they subscribe to? |  |
| What else do they enjoy doing in their free time? |  |
| Other 1 |  |
| Other 2 |  |
| Other 3 |  |

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 |  |  |  |  |
| Other 1 |  |  |  |  |
| Other 2 |  |  |  |  |
| Other 3 |  |  |  |  |
| Other 4 |  |  |  |  |

|  |
| --- |
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