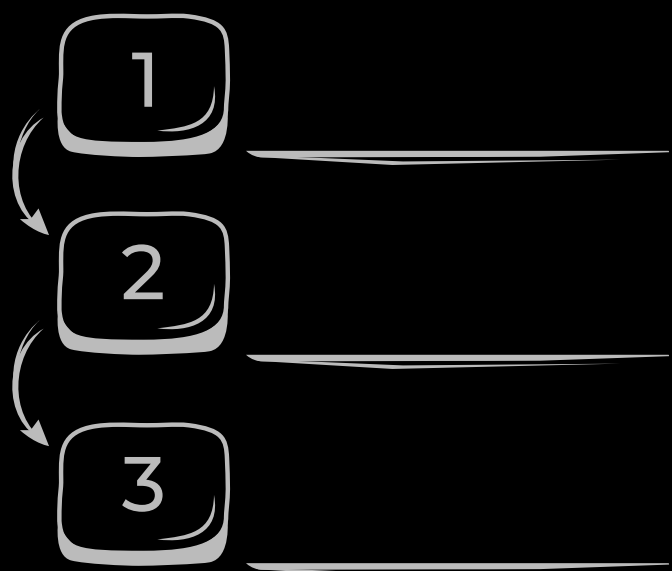


Crafting your ideal customer profile

A comprehensive step-by-step guide for B2B companies



Focus your efforts on the prospects who will benefit the most from your offerings.

They are the most likely to purchase and remain loyal.

**Ideal
Customers**

Those that are the best fit for what you offer

Target Market

All potential customers for what you offer



The eight essential steps to crafting your ideal customer profile

- 1) Define your ideal customer
- 2) Collect customer data
- 3) Interview customers
- 4) Analyze data
- 5) Build a hypothetical profile
- 6) Test and refine
- 7) Share and align your organization
- 8) Regularly review and update



Define Your Ideal Customer

Decide on the criteria that you will use to identify your ideal customers.

Consider things like:

- High usage
- Revenue potential
- High customer satisfaction
- Refers others to your solutions
- Short sales cycle
- Prompt payers
- Low support needs



Define Your Ideal Customer

Obtain input from your sales, marketing, product, customer success, and finance teams.

Each will have a unique perspective on your ideal customers based on their interactions.



Collect Customer Data

You likely know a fair bit about your best-fit customers already. You need to document it.

Capture the data in a spreadsheet such as Microsoft Excel or Google Sheets to easily share and collaborate internally.



Collect Customer Data

There are three key elements to collect:



Collect Customer Data

Here's an example:

Category	Factor	Ideal Customer Example	Ideal Customer A	Ideal Customer B	Ideal Customer C	Ideal Customer ...
Firmographics	Industry or Sector	Software development				
	Size: Total employees	~60				
	Size: Department employees	4 in marketing				
	Size: Revenue	>\$20M ARR				
	Size: Budget	Spend \$100K/yr on marketing tech stack				
	Size: # of locations	0 (fully remote)				
	Ownership type (private, public, subsidiary, etc.)	Private				
	Growth stage (startup, SME, enterprise)	Series A startup				
	Business model	B2B				
	Key product/service	SaaS analytics				
Technographics	Geographic location	Canada				
	Software, hardware, platforms	Google Workspace Salesforce CRM HubSpot CMS				
Psychographics	Attitude to using and adopting new technologies?	Very open to adding to their tech stack				
	Organization culture and mindset	Risk-taking, fast decisions				
Situation	Business situation, objectives & motivations	Focused on growing revenue through new customer acquisition				
	What were they trying to do? What "job" or "jobs" was your solution being hired to do?	Provide an easy way for sales team to grab current marketing material and track the effectiveness of the collateral				
	What was the old way? What was the problem with the old way?	Shared folder on Google Drive - Hard to find relevant material - Users unsure what was current - No ability to track what was actually being used to win deals				
	Can they afford your solution?	Yes, have the budget				
	What was the trigger that caused them to look for a solution?	Starting to scale and Marketing team swamped with requests from Sales who were getting frustrated				
Other Considerations	Pay on time?	Prompt				
	Refer you to others?	Yes, and left G2 review				
Buying Group	Interactions with your team	Positive, good relationship across all touchpoints				
	Buying process	PMM searched for and recommended a solution, check with IT and approved by VP Marketing				
	Champion role	Product Marketing Manager				
	Economic buyer role	VP Marketing				
Champion Persona	Users	IT				
	Job titles	Product marketing managers (admins) Sales team (users)				
	Objectives	Product Marketing Manager (PMM)				
	Challenges / Pain points	Find, research and recommend a sales enablement tool - Comparing the many options available in the market - Spending a lot of time providing latest version of collateral to sales team				
	Decision-making factors	Ease-of-use for admins and end users				
	How did they find out about you?	Talked to peers on PMA Slack group				
Economic Buyer Persona	Where did they get information?	- G2 review site - Our website				
	What info were they looking for?	Capabilities, reviews, pricing				
	Job title	VP Marketing				
	Objectives	- Save marketing team time - Measure and report enablement efforts to revenue				
Other Influencer Persona	Challenges / Pain points	- Demonstrating ROI of marketing efforts - Affordability - Scalability				
	Decision-making factors	Assigned search for solution to PMM				
	Behaviour	Director of IT				
Other Insights	Challenges / Pain points	Minimize security risk of software tools - Assessing security risk of new software tools - Managing user access control and permissions				
	Decision-making factors	- Security				



SIDENOTE

For an in-depth exploration of the types of information to collect and their sources, refer to my ***Know Your Ideal Customers*** companion guide.



Visit mcclurgmarketing.com/resources



Validate with Customer Interviews

Talk to your ideal customers to flesh out your data and correct earlier assumptions. Understand:

- The challenges they were facing
- The ideal outcome they were looking for
- How they found out about you
- What caused them to reach out
- Why they chose you
- What they value most about your solution
- Their likes and dislikes about your offering
- Are there any pain points you are not yet solving

*Follow-up questions enable
you to dive deeper*



Analyze Your Customer Data

Derive insights from your data analysis by identifying common characteristics, patterns, and traits.

You'll want to spend time on this



Build a Hypothetical Profile

Craft a concise description of your ideal customer. Here's an example for a company that sells a sales enablement solution.

Product Marketing Managers of **B2B SaaS companies** in the **U.S or Canada** that have **ARR of at least \$20 million** and are frustrated with using **Google Drive** to share marketing and training resources with their sales team.



Build a Hypothetical Profile

Note that this profile doesn't include every characteristic identified earlier.

The trick is to zero in on the **key factors** that will help direct your efforts.

The other details will help you craft marketing messages and sales strategies and highly target your ad campaigns



Also Create a Negative Profile

Identify characteristics of companies that are not a good match for your products or services as well.

These red flags will help you eliminate prospects in your pipeline that you will likely waste time and effort on.

“The essence of strategy is choosing what not to do”

— Michael E. Porter



Test and Refine

Once you have a hypothetical profile, test it out in the field by identifying prospects that are a match.

Gather feedback and continue to refine.



Share and Align Your Organization

Share your profile across your company.

Get everyone aligned around a shared understanding of your ideal customer.



Regularly Review and Update

Your ideal customers might shift as the market changes and your product or service evolves.

Conduct an annual review and update to maintain relevance.



Understanding your
ideal customers
brings substantial
benefits across your
business.



Targeted Marketing Strategies

- Craft targeted marketing messages and campaigns that resonate.
- Efficiently utilize marketing channels suited to customer preferences.
- Achieve higher engagement, conversion rates, and ROI.



Enhanced Sales Effectiveness

- Focus efforts on high-conversion prospects.
- Tailor pitches to address specific customer needs and pain points.
- Increase close rates and discover upsell and cross-sell opportunities.



Boosting Customer Satisfaction

- Design value-adding customer success initiatives.
- Enhance customer satisfaction, loyalty, and retention.
- Proactively address and solve customer needs and problems.



Focused Product Development

- Ensure product features and functionality meet actual customer needs.
- Achieve faster product-market fit and reduce development missteps.
- Streamline the development cycle by focusing on relevant improvements.



Unified Company Direction

- Unite all internal teams towards a common goal.
- Foster a cohesive, customer-centric company culture.
- Improve organizational efficiency and goal achievement.

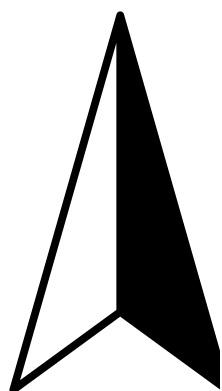


Your Ideal Customers are the Compass for Your Business

Prioritize understanding your ideal customers.

It brings clarity to your business and sets you up for success.

**Ideal
Customers**



I help B2B companies with
marketing strategy and
execution guidance to compete
effectively and win.

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