

# CUSTOMER AVATAR

Your customer avatar is your ideal client. If you can clearly define who your customer avatar is you'll be able to tailor your marketing messages and cater your services to meet their needs. Getting an accurate description requires pulling information from a variety of places. Remember it isn't who you want to target, it's who would benefit the most from your business. So talk to sales reps, project managers, and look at customer surveys, reviews, and testimonials. You can't be everything to everyone, but you can be something to someone. It's time to figure out who that someone is.

## BEST CLIENTS

For this section, and the one following, think of the clients and projects your business has worked with or is currently working with. Collaborate and get input from others. Having a solid foundation here will ensure that your customer avatar is realistic and attainable.

**Which clients are most profitable?**

**Which clients have been with your business longer than the average lifecycle?**

**Which clients signed on quickly and easily relative to the average sales cycle?**



**Which clients always pay on time?**

**Which clients respond promptly, clearly, and constructively?**

**What are your most enjoyable projects?**

**What services and products produce the highest ROI?**

**Which clients have left raving reviews and sent you referrals?**



# WORST CLIENTS

Knowing which clients you do NOT want to work with is just as important as knowing which clients you do want to work with. The more criteria you have for your target audience the more focused your marketing efforts will be.

**What services and products produce the lowest ROI?**

**Which clients are hard to reach and communicate with?**

**Which clients habitually don't pay on time?**

**Which clients cause the most stress and trouble?**



**Which clients have complained or asked for a refund?**

**Which projects didn't go well because the client wasn't a good fit? (Lack of infrastructure, not enough manpower, too small of a budget, etc.)**

**Which clients consume the most of your time?**



# DEMOGRAPHICS

It's time to start developing your avatar. We'll start off easy with basic demographic questions. When answering questions from this point forward think about your average client or target audience.

**AGE**

**GENDER**

**GENERATION**

**EDUCATION LEVEL**

**MARITAL STATUS**

**FAMILY SIZE**

**GEOGRAPHIC LOCATION**

**INCOME LEVEL**

**OCCUPATION**

**JOB TITLE**

**YEARS OF EXPERIENCE**

**OTHER**

**NAME**



# PSYCHOGRAPHICS

This is where things get a bit harder. We now have to get inside the mind of the avatar. You need to think about what makes them tick. The more detailed you get in your responses the more comprehensive understanding you'll have on how to reach your target audience.

## **POLITICAL VIEWS**

## **RELIGIOUS VIEWS**

## **PRIORITIES**

## **INTERESTS (ENTERTAINMENT, BUSINESS, FAMILY, WELLNESS, LIFESTYLE, ETC.)**

## **GOALS (PERSONAL, FAMILY, BUSINESS)**

## **WHAT STRESSES YOUR AVATAR?**



**WHAT FRUSTRATES YOUR AVATAR?**

**WHAT SCARES YOUR AVATAR?**

**WHAT MAKES YOUR AVATAR SAD?**

**WHAT MAKES YOUR AVATAR HAPPY?**

**WHAT DOES YOUR AVATAR DO TO RELAX?**

**SPENDING HABITS (PURCHASING BEHAVIOR, CHARITABLE DONATIONS, ETC.)**



# INTERNET

## FAVORITE WEBSITES

## PRIMARY LOCATION WHEN USING

## PRIMARY USES

## DAILY TIME SPENT ONLINE

## VIEWING PLATFORMS:

- Mobile Device
- Desktop
- Tablet
- Other

## KEYWORD SEARCHES

# BUSINESS

Before your business can help your avatar professionally you need to understand what a day in the office looks like from their perspective. It's likely that you've been in their shoes before, so pull from that experience. If you haven't been in that position, find someone who has and ask them about it.

## INDUSTRY/NICHE

## INDUSTRY SIZE

## ANNUAL REVENUE

## GEOGRAPHIC LOCATION

## YEARS IN BUSINESS

## NUMBER OF EMPLOYEES





**WHAT ARE YOUR AVATAR'S JOB RESPONSIBILITIES?**

**WHAT TOOLS, SOFTWARE, AND PLATFORMS ARE USED?**

**How many \_\_\_\_\_ do they have each day?**

Meetings

Phone Calls

Emails

**HOW DOES YOUR AVATAR LIKE TO BE COMMUNICATED WITH?**

**What kind of workspace does your avatar have?**

Shared Space

Home

Cubicle

Office

Other

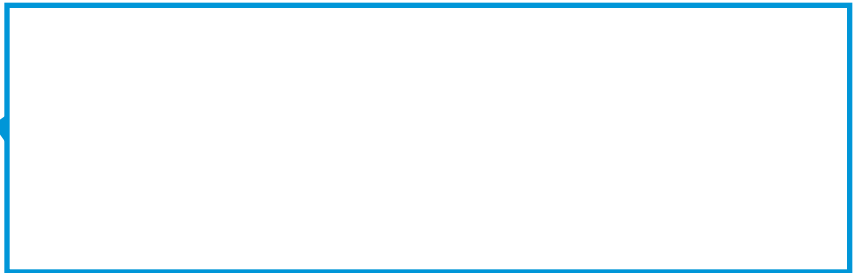
**WHAT IS YOUR AVATAR'S ROLE IN THE PURCHASING PROCESS?**

**WHO DOES YOUR AVATAR REPORT TO? WHO REPORTS TO THEM?**



**Where does your avatar go for information? (Check all that apply then expand on the top 4)**


- Books
- Magazines
- Newspaper
- TV
- Blogs
- Conferences
- Friends
- Internet
- Facebook
- Twitter
- LinkedIn
- YouTube
- Other



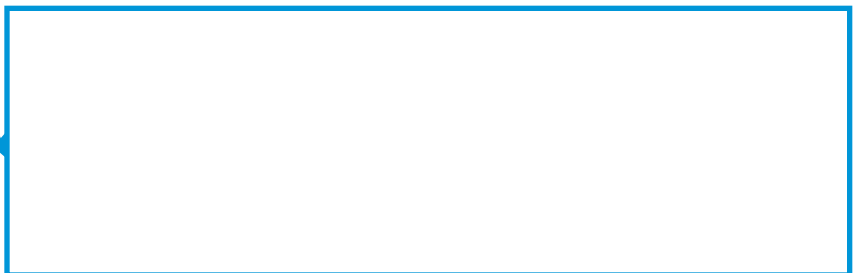
A large empty rectangular box with a blue border, intended for the user to expand on the first selected information source.



A large empty rectangular box with a blue border, intended for the user to expand on the second selected information source.



A large empty rectangular box with a blue border, intended for the user to expand on the third selected information source.



A large empty rectangular box with a blue border, intended for the user to expand on the fourth selected information source.



# THE PROBLEM

Now it's time to figure out why your avatar needs you. Before you can position yourself as the perfect solution you must first understand the problem at hand. Their problem isn't "Less Sales" its "A lack of automated follow up systems due to switching CRM platforms last year, and sales reps that were never trained on how to properly use the new system." Now that's a real problem.

## EXPLAIN 3 PROBLEMS YOUR AVATAR IS HAVING.



### WHAT IMPACT IS THIS HAVING?

### HOW DOES THIS MAKE THEM FEEL?



**WHAT'S THE WORST THING THAT COULD HAPPEN IF THESE PROBLEMS DON'T GET SOLVED?**

**HOW WOULD THEY FEEL?**

**HOW WOULD THEIR BOSS REACT?**

**WHAT WOULD THE CONSEQUENCES BE? (FINANCIALLY, PROFESSIONALLY, PERSONALLY)**

**HOW DOES YOUR AVATAR APPROACH CHANGE?**



**WHAT'S THE STRAW THAT BROKE THE CAMEL'S BACK?**

**WHAT COULD POTENTIALLY HAPPEN THAT WOULD SHIFT THIS PROBLEM TO THE BACK BURNER?**

**WHAT'S THE BEST THING THAT COULD HAPPEN IF THESE PROBLEMS ARE SOLVED?**

**HOW WOULD THEY FEEL?**



**WHAT IS THE PERFECT SOLUTION? WHAT DOES IT ACCOMPLISH?**



**HOW MUCH WOULD THEY HONESTLY BE WILLING TO PAY FOR THAT SOLUTION?**



# YOUR BUSINESS

You must anticipate what your avatar expects from an business. You need to be able to mitigate objections, minimize fears, correct misconceptions, and wow them every step along the way. Answering these questions before they even have the chance to ask them will position you for success.

**WHAT MUST HAPPEN BEFORE THEY CAN WORK WITH YOUR BUSINESS?  
(PROPOSAL, APPROVAL, BUDGETING, ETC.)**

**HAS YOUR AVATAR WORKED WITH A DIFFERENT BUSINESS BEFORE? WHAT WAS THAT EXPERIENCE LIKE?**

**WHAT IS YOUR AVATAR REALLY TRYING TO ACCOMPLISH WITH YOUR BUSINESS?**

**WHAT ASPECTS OF AN BUSINESS ARE MOST IMPORTANT TO YOUR AVATAR?**

**HOW DOES YOUR BUSINESS HELP? (FULFILL A NEED, RELIEVE A PAIN POINT, MAKE THEM FEEL GOOD)**

**WHAT CONCERNS MAY YOUR AVATAR HAVE WITH YOUR BUSINESS?**

**WHAT OBJECTIONS MAY YOUR AVATAR HAVE DURING THE SALES PROCESS?**



# THE STORY

Use all of the brainstorming you've done this far to put together a story about your avatar. Try writing it in first person to really put yourself in their shoes. Think about what they were thinking/feeling/doing as they progressed through the following stages:



# FOLLOW UP

Your avatar has now developed a life story, a name, a personality, and a face. They are no longer an imaginary being; they are a real person you can target. You know what makes them tick, how they think, how they feel, and what they need. This should give you a newfound clarity in answering the following questions, and give you a clear direction for future marketing campaigns.

**WHAT WOULD BE THE BEST PLACE TO ADVERTISE TO REACH YOUR AVATAR?**

**WHAT TYPE OF ADVERTISEMENT INFLUENCES YOUR AVATAR THE MOST?**

**WHAT KIND OF LANGUAGE SHOULD YOU USE WHILE MARKETING TO YOUR AVATAR?**

**WHAT STORY SHOULD YOU BE TELLING WITH YOUR CONTENT MARKETING?**

**DESCRIBE YOUR PRODUCT OR SERVICE.**

**WRITE DOWN A 30-SECOND ELEVATOR SPIEL OR SALES PITCH TO YOUR AVATAR.**

