Profile Name _____

The following template will help you create a client profile for your business. Before you begin, you'll need to define the type of client you're profiling. It can be your most loyal customers, business owners, individuals, etc. These are just a few ideas. Get creative and don't worry if you change this later.

Part 1: Demographics

1. What is the typical age range of this customer? _____

   Keep this range under 20 years, else you may be trying to squeeze customers together who would instead be better suited in their own group. For example, 30 – 40 rather than 20 – 40.

2. What is their gender? _____

   Choose male, female, both/not applicable. If your profile includes both men and women, make sure your services and marketing materials are, in fact, gender neutral. Otherwise, break this out into two separate profiles, one for men, one for women.

3. What is their level of education? _____

   Some high school, high school, TAFE, Undergraduate, or Postgraduate.

4. What is their occupation? _____

   If you can't get specific, think broader categories: Office jobs, hospitality, works outdoors, medical, construction/labour, self-employed, etc.

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5. Where do they live? _____

   Pinpoint a specific city or neighborhood. Do they live in a single-family home, apartment, unit, etc.

6. What is their household composition? _____

   Are they single, married, cohabiting? Do they have children and if so, how old are they? Do any adult family members live in the house? Do they have pets?

7. What is their race or ethnic origin? _____

   Though not always relevant, race/ethnicity can be important for some businesses.

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8. In the space below, add any more relevant demographic detail.

   Some examples might include: Do they have a specific body type or hair colour? Do they drive a particular car? Do they practice a particular religion?

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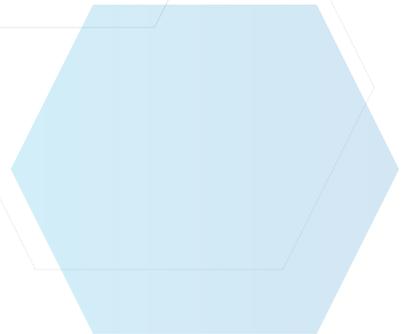
Part 2: Psychographics

Now onto the trickier part: Psychographics involves the mental characteristics of your clients. Their goals, beliefs, motivations and anxieties. This generally takes a bit more research than demographics since you'll need to speak with clients to find these answers.

1. What are their hobbies/interests? _____

   You might say sports, pop culture, politics, art, outdoors, theatre, etc.

2. What are their favourite TV shows? _____

   Or, if TV isn't relevant, list their favourite movies, books, albums, websites, etc.

3. What problems are they solving using your services? _____

   Try to think less literally (i.e. they get their taxes done to prevent action from the ATO) and more about the specific motivations that bring them to your business. (i.e. They have a complicated tax return and I am able to simplify it and provide them with a positive return each year).

4. What are the concerns or anxieties the customer may have about your business? _____

   Following the same example, this client is concerned about being audited and that you may claim incorrectly due to the complexity of the return. Other examples might be concern about high prices, delays in submission, etc.

5. What are some of the potential turn-offs that would make the client not return to your business? _____

   Aside from their bigger anxieties, what smaller incidents can be off-putting to this customer?

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6. What would make this customer recommend your business to a friend? _____

    On the flipside, what are some of the elements that would make the customer especially excited about your business?

7. How much are they willing to spend on your services? _____

    Also consider, how frequently do they purchase it? Do they have a monthly subscription? Would they be willing to sign up to a monthly?

8. List any more important psychographic details:

    What are their political beliefs? What is their physical style & fashion? What are they planning for the future (Hoping to start a family? Retire soon? Travel?).

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Part 3: Actionable Insight

Now the fun part, it's time to pull everything together and start creating a plan. How are you going to market to this customer and what services are you going to sell to them?

1. What are the best ways to reach this customer?

   TV, radio, newspaper, Facebook, Twitter, Pinterest, Yellow, Billboards, etc.

2. What types of promotions are going to engage this customer?

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   Are they going to be encouraged by a competition? What item will they win? How does it relate to your services? Are seasonal services more effective, a Christmas sign-up deal, cheaper taxes for getting in early?

3. What types of promotions are NOT going to engage this customer?

   Along the same lines, is there a specific channel or promotion that will not work with this customer? Should you avoid direct mail or Facebook advertising?

4. What new services are going to interest this customer?

   Do they prefer a particular service? What potential changes could you make to encourage them further?