

Short version

Customer Profile



Products/Services Used

Customer uses [product] to do [task].
Customer uses [product] to do [task].
Customer uses [product] to do [task].

Demographics

- Career: Enter Career
- Industry: Enter Industry
- Location: Enter Location
- Gender: Enter Gender

Customer Story

Customer Benefits

Customer Benefit
Customer Benefit
Customer Benefit
Customer Benefit

Customer Pain Points

Customer Pain Point
Customer Pain Point
Customer Pain Point
Customer Pain Point

Summarize the customer's story in a couple of sentences. Speak to the traits that match up with them being a customer. You can also speak to whether or not they chose you over a competitor.

Customer Communication Talking Points

*Talking Point
Talking Point
Talking Point
Talking Point*

Customer Retention Tactics

*Retention Tactic
Retention Tactic
Retention Tactic
Retention Tactic*

Long version



Customer Profile

Include a brief, insightful summary about the customer you are profiling in this introductory section.

External Attributes (Step 1)

Customer Industry	<i>State the customer's industry.</i>
Customer Vertical	<i>State the customer's vertical.</i>
Customer Profit/Revenue	<i>State the customer's (projected) revenue and profit.</i>
Customer Employee Size	<i>State the number of employees at the customer's company.</i>
Customer Location	<i>State the location of the customer('s company).</i>

Contextual Details (Step 2)

Team Size	<i>State the customer's team size.</i>
Team Challenges	<i>List out the customer's team challenges at their company.</i>
Technologies Using	<i>List out the technologies the customer uses to do their job.</i>
Short-Term Goals	<i>List out the customer's short-term (three-month) team goals.</i>
Long-Term Goals	<i>List out the customer's long-term (one-year) team goals.</i>
Problem Assessment Process	<i>Explain the customer's process for assessing problems.</i>

Impact of Main Challenges *Explain the impact the challenges have on your customer.*

Challenge Response Tactics *Explain how the team currently faces its challenges.*

Personas (Step 3)

Customer Job Title *State the customer's job title.*

Customer Age (Range) *State the customer's age or age range.*

Customer Education Level *State the customer's education level.*

Customer Income *State the customer's income.*

Customer's Key Responsibilities *List out the customer's key responsibilities.*

Product Use Overview *Explain how the customer will use your product.*

Marketing Channels *Provide an overview of the marketing channels that are more effective for reaching this customer.*

Decision Making Process *Provide an overview of your customer's decision making process.*

How Does Your Product/Service Help? (Step 4)

Perceived Product Value *Explain the value that your business provides your customer.*

Products Utilized *List out which of your product(s)/service(s) your customer uses.*

Solutions Provided *Explain how your product(s)/service(s) solve customer pain points.*

Product Pain Points *List out the pain points your customer may experience while using your product.*

Perceived Competitive Advantages *List out the features that differentiate you from competitors.*

