

Episode 8 - Worksheet



CRAFTING THE CLIENT PROFILE : YOUR IDEAL CLIENT PROFILE

Date : _____

This worksheet is designed to help you create a detailed profile of your ideal client, enabling you to connect and build meaningful relationships with like-minded individuals.

By outlining demographics, industries, decision-making processes, and key desires, you'll be able to tailor your services to meet their specific needs effectively and narrow down your prospects to your ideal client.

1. What Industry are you planning to Target: _____

2. What Product and/or service are you planning to sell: _____

3. What is your main competitive advantage in the marketplace: _____

4. Target Industries

What does your ideal customer specialise in (or are looking to buy) AND what type of requirements would be needed to service them?

Example: Dairy Products

*Refrigerated Transportation / Temperature Control and Temperature monitoring, Expedited Service (fast delivery), etc
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5. Background / Demographics:

What does your ideal customer look like? (Keep in mind this does not need to be exact. This is meant to be a guide to help you connect with and build relationships with other like minded people who you can build meaningful connections with.)

1). Average Age / Gender of Ideal Client

**2). Personal Life of Ideal Client
(Family, Single, Hobbies, Interests)**

3). Job Title / Job Responsibilities of Ideal Client

4). Location / Area of Service

5). Annual Revenue/Income of Ideal Client

**6). Average Company Size
(for Business to Business Sales only)**

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6. Deciding Factors

What 2 Factors are most important for your ideal customer to have? It is typical in transportation and other major industries that customers value 1 or 2 of these more than the other(s). Defining what's most important to your client profile will help you narrow down your prospects.

Service

Price

Speed

Quality

Choices / Options

7. Decision Making Process

How does your ideal customer decide on their purchases? Check the Boxes that apply

- **Research / Competitor Considerations**
- **Price vs. Value of Service**
- **Outside Opinions (Testimonials / Referrals)**
- **Value adds (Additional service points that make your product desirable)**

8. Product Alignment

What product(s) and/or service(s) does your ideal customer see value in? (If you are focusing on Sales outside of Transportation, add additional items specific to your industry in the available boxes below)

- **Well maintained Equipment**
- **Insurance Coverage**
- **Low Cost / Cost Saving Options**
- **Team Service (Expedited)**
- **Visibility of shipments in Transit**
- **White Glove Service**

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• *Dedicated 24/7 Customer Service*

• *Security Protocols*

• *Financial Stability of your company*

• .

• .

• .

• *Safety Rating*

• *Temperature / Quality Control*

• *Driver Turnover*

• .

• .

• .

9. Wants, Goals and Desires

Provide an overview of what your ideal customers goals are in both life and their career - specifically how your service can/will help them achieve those goals:

Example: My ideal customer wants a service provider that takes work off their plate, freeing up their time to focus on other tasks.

1.

2.

3.

4.

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10. Behaviours and Tendencies

Outline a few of your ideal customers daily habits and activities – specifically those that may pertain to your product or service.

Example: My ideal customer spends 3-5 hours every day scheduling trucks for the coming week.

1. _____

2. _____

3. _____

4. _____

Based on the above, what kind of solutions are you able to offer/build to meet the requirements of your customers? Use the below section to brainstorm some ideas:

Ex) Company now provides online track/trace reporting on all trucks which reduces the amount of time the customer spends each day getting location updates.
