PROFILER

QUICK START CHECKLIST

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READY TO CREATE YOUR FIRST IDEAL CUSTOMER PROFILE?

This checklist is a great place to get started! In these 8 steps, you'll see how to gather data, do customer research, put that data to good use, and create and maintain ICPs that empower your business.

STEP 1 : GATHER CURRENT CUSTOMER DATA FROM ONLINE SOURCES

A useful ICP is based on real data, not guesswork. Here are some ideas on where to find the data you've already collected on your customers:

- ✔ **Data from Google Analytics:** This tells you how customers interact with your website. Pay special attention to customer behavior on the pricing page.
- ✔ **Data from CRM:** The most important information about the companies who purchase your product will be here.
- ✔ **Data from lead generation forms:** What are potential customers telling you about themselves when they fill out your lead gen forms?
- ✔ **Data from Clearbit and other similar services:** Services like Clearbit offer you the ability to find publicly available data based on a domain or email address.
- ✔ **Data from how customers use your software:** This will tell you more about the features they use, what they don't use, and where users struggle most.

STEP 2 : TALK TO YOUR CURRENT CUSTOMERS

To gather real data about real customers, go directly to the source. Here's a checklist to help you get through customer interviews:

- ✔ **Decide which customers you want to interview:** Start with your high-value and high-engagement customers.

- ✔ **Choose the questions that best fit your business:** Use the questionnaire in this kit to find your best ICP interview questions, and pick the top 7-10 questions that have the most impact on your customers and your business.

- ✔ **Conduct multiple interviews:** The exact number will depend on how many ICPs you want to create, but generally the more interviews you have the easier it will be to spot patterns.

- ✔ **Record interviews so you can go back and decipher the answers:** You can do this with a CRM like Close, which allows you to store recordings of both phone calls and video meetings with Zoom.

✔ **Create an online survey for customers:** If your customers are too busy to chat, give them the option to fill out a quick survey.

✔ **Gather answers together in a spreadsheet:** Having a single source of truth will help you analyze the data later on. Import survey answers to a spreadsheet, and record the answers to interview questions there as well.

✔ **Keep interviewing until you're able to see patterns in the answers:** When you can predict how a customer will respond to a certain question, you have enough data to work with.

STEP 3 : TALK TO YOUR POTENTIAL MARKET

This is an optional step for businesses that are in the pre-launch stage or that are launching in a new market.

- ✔ **Decide on the market you want to target:** If you're building a new product or launching it in a new market, you should have an idea of who you're targeting.
- ✔ **Use the referral method to get introductions to the right people:** Cold outreach can be difficult at this stage; instead, ask people in your network whether they know anyone who fits the market you're aiming for, and get an introduction.
- ✔ **Be clear this is not a sales call:** Make sure the non-customer knows right from the start that you're not trying to sell anything.
- ✔ **Pick just 3 or 4 questions to ask:** These people are getting nothing from you, so don't waste their time. Keep the call (or survey) extremely brief.
- ✔ **Consider incentivizing:** If you want to get more information from non-customers, you should consider offering some kind of incentive for doing a longer interview or filling out a longer survey. This could be a gift card, a cash reward, or a discount on your product.

STEP 4 : GATHER INSIGHTS FROM THE TEAMS DEALING WITH CUSTOMERS DIRECTLY

Sales, customer service, and success have the most direct interaction with customers and leads. So, include their insights when building ICPs:

- ✔ **Get information about leads from your sales team:** The information they get during sales calls and demos can tell you about your leads' businesses, pain points, favorite features, and buying process.

- ✔ **Learn about product use from customer service and success:** These teams can tell you how customers use the product after purchase, which features they like or dislike, and which customers have the most success with your product.

- ✔ **Learn from customer feedback and complaints:** This can tell you what type of customer tends to complain more, which complaints are common, and which customers may not be a good fit for your product.

STEP 5 :
ANALYZE DATA IN A MEANINGFUL WAY

Now that you've gathered your data, it's time to use it:

- ✔ **Use your spreadsheet to determine which are the most popular answers:** The resulting patterns will tell you important data about your most successful customers and their common traits.

- ✔ **Determine whether two (or more) common profiles are emerging in the data:** If you see two or more common patterns for the questions, it may be necessary to create more than one ICP for your business.

STEP 6 :
CREATE YOUR IDEAL CUSTOMER PROFILE(S)

Your ideal customer profiles are almost ready. All you have to do it put them together:

- ✔ **Use a template (like the ones in this kit):** An ICP template will help you put the right data together and create your ICP quickly.

- ✔ **Include only the data that really matters:** Don't flood your teams with irrelevant customer data. Only include what has a real impact on interactions with customers and business processes.

- ✔ **Highlight the main pain points and motivations of each ICP:** These are essential aspects of your customers that should be included.

- ✔ **Include an elevator pitch for your product:** Once you know what makes your customers tick, you should include a one-sentence elevator pitch that resonates with each ICP.

- ✔ **Create a non-ideal customer profile:** This is basically an opposite profile including the traits of customers that tend to churn or complain, or simply aren't a good fit for your business.

STEP 7 : ENABLE DIFFERENT TEAMS TO USE IDEAL CUSTOMER PROFILES

Now that you have your ICPs set up, use them to empower different teams within your company, and convince potential customers to purchase.

- ✔ **Use multiple ICPs to set up marketing segmentation:** If multiple profiles have been created, use these profiles to segment your email marketing and ad campaigns.
- ✔ **Update your website copy to fit your ICP:** Make sure to hit the main pain points and motivations of your most successful customers.
- ✔ **Create landing pages that resonate with your ICP:** You know them better now, so prove it. Show them you understand what they need and why they need it.
- ✔ **Use the right language and tone inside your product:** Especially for SaaS businesses, use your ICPs to speak the language of your customers inside your software.

- ✔ **Craft your sales scripts and email templates to fit your ICPs:** Pay special attention to the features that stand out most to your best customers.

- ✔ **Update your pricing page to reflect valued features and pricing sensitivity:** Keep the features your customers care about most at the top of the list, and make sure your pricing page reflects the ROI that customers will receive from their purchase.

STEP 8 : KEEP YOUR IDEAL CUSTOMER PROFILES UPDATED OVER TIME

Hold on, your work isn't quite done yet. To make sure your ICPs are valuable in the long-term, you'll need to keep them updated.

- ✔ **Conduct customer interviews at regular intervals:** The frequency will depend on the market you serve and how quickly their world is changing, but make sure you set a regular time to conduct new interviews.
- ✔ **Every few months, review data from Google Analytics and from inside your software to see how people come to your website and use your product:** Keep this information stored in a spreadsheet and watch for new patterns.
- ✔ **Update your ICPs when you see new patterns emerging:** As you continually update your customer data, the common traits of successful customers may shift. In that case, it's time to update your ICPs.

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