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IDEAL CUSTOMER PROFILE WORKSHEET



IDEAL CUSTOMER PROFILE WORKSHEET INSTRUCTIONS

DEFINITION

An ideal customer profile (ICP) is a template of demographic and firmographic characteristics relating to companies that benefit the most from your product or service. Companies that fit your ICP are most likely to buy and continue to use your product—making them the foundation for acquiring new paying customers and growing revenue.

ICPs aren't just a valuable tool for sales teams; they also provide your product and marketing teams with useful insights that you can use to fuel your go-to-market strategy.

On top of that, ideal customer profiles help you to:

- 1. Speed up the sales cycle.** Give your sales team the right tools to close more deals faster.
- 2. Personalize marketing.** With an ICP handy, you can create relatable campaigns and connect with your customers by knowing their pain points.
- 3. Increase customer lifetime value (CLV.)** Targeting the right people means more chances to [increase your deal size](#). Do you know what an increased deal size means? Yup, a higher lifetime value.
- 4. Help with Account-Based Marketing.** Knowing your best customers will help you shape your account-based marketing strategy and create a personalized experience.

Luckily, building an ICP isn't a complex process. The following seven steps will help you build an ICP tailored to your company.

- 1.** Write down your best customers (at least 10). Ensure this information is data-backed from relevant sources.
- 2.** Analyze your customers that achieved success with your product. Ask yourself what made them stay? How did they use your product to achieve their goals?
- 3.** Compile a list of the notable attributes that emerge from your analysis. Look for the 5 to 10 most recurring attributes that indicate higher revenue.
- 4.** Speak with your customers to identify their objectives and challenges (via a Zoom call or social community).
- 5.** Shape your unique value proposition based on the findings of the previous analysis so that it aligns with your customers' objectives, challenges, and pain points.
- 6.** Document your ICP using Breadcrumbs' ICP Worksheet.
- 7.** Review and revise your ICP regularly.

Let's get started!

HOW TO COMPILE YOUR ICP WORKSHEET

By downloading this ICP bundle, you're one step closer to getting your ideal customer profile defined.

The ICP Worksheet has three columns, two of which are fillable:

- **Category** is pre-compiled and identifies the category of your customer.
- **Details** is where you can add in all the relevant information related to the category.
- **Source** identifies the source of the information. (Form fills, Validated by customer interviews, through online research, or via data provided by third parties such as LinkedIn or Forrester.)

Here's a description of how to compile your ICP Worksheet.

1 FIRMOGRAPHICS

Firmographics, also referred to as firmographic data, is a collection of crucial characteristics about businesses that a company may use to develop distinct market segments and find high-value clients. These are the most important data points to include in your ideal customer profile:

Industry

An industry is a group of companies related by their primary business activities. In this field, add the industry(ies) your ideal customer belongs to. (Automotive, Financial, Legal, SaaS, etc.)

Market Segment

A market segment is a group of people or companies who share common traits, usually grouped for marketing purposes. In this field, insert what market segment your ideal customer is. (B2B, B2C)

Geography

It may make sense for you to market to a specific location (or set of locations), particularly if you are selling physical products.

Company Size

Company size refers to what kind of company you're going after, both in terms of ARR (Annual Recurring Revenue) and the number of employees, so this field should include both.

Team Size

How many people in the same team will use your product or service? This is important because it will inform how many people you need to speak to before closing the deal and whether your product or service is ready for multiple users.

Budget

How much are your potential customers already paying for a solution similar to yours, and how much would they spend if they chose your solution? This will inform you of what kind of objections you may receive.

2 BEHAVIORAL INSIGHTS (PERSONA)

Personas are fictional profiles of customer segments. They highlight key demographic characteristics and information about each segment to help you create messages that truly resonate. They work with firmographics to give you a complete picture of your ICP.

Job Title

Job titles guide the level (if any) of decision-making and budget authority the person has. Identifying the correct job titles can go a long way in helping your sales team shape that conversation, push the deal forward, and overcome any customer objections with the right person.

Objectives

What are the end goals your customers are looking for when searching for your product? What results do they want to achieve in the short term vs. long term? This will help you shape your product and market the right features correctly. (I.e., short term: improving brand awareness; long term: improving conversion rates.)

Challenges & Pain Points

What challenges or pain points do your customers have that prevent them from achieving their objectives? These are the main reasons they are looking at your product or service in the first place. Knowing these questions will help you determine how your solution solves their pain points.

Decision-making Factors

There are some factors your customers will need to consider before going through with your solution. How many people would need to agree? Are there any financial/compliance issues? Would they need to run a competitive analysis before going forward? Factoring this in will give you a competitive edge when handling objections.

Behavior Attributes

Are there any other specific attributes that your ideal customers have? This field is the place to put any additional information you have that can give you a competitive edge. (Reads the newsletter weekly, frequent blog visitor, etc.)

3 VALUE PROPOSITION

Your value proposition refers to the value you as a company promise to deliver to your customers if they decide to purchase your product or service. In the context of the ICP framework, what your value proposition should include are the main reasons why a customer should choose your product or service over your competitors.

YOUR NEXT STEP

Now that you know what information you need to create your ideal customer profile, it's time to create it.

Where do you find all the information you need? Your contact database.

And Breadcrumbs Reveal is here to help.

In just a few steps, you'll have a complete view of your database health and what attributes and actions are the best revenue predictors without having to sift through all the details yourself.

The best part of all? Breadcrumbs Reveal is completely free.

There are just three simple steps to getting started with Reveal:

- 1. Connect your data.** Connect your lead and customer data with no-code connectors to popular tools such as HubSpot, Marketo, Salesforce, Mixpanel, Intercom, and more.
- 2. Define Your Objective.** Let us know what segment of contacts we should use to define success. i.e., all paying customers or paying customers on specific plans.
- 3. Get Your Results.** See which attributes are the best predictors of revenue today, while machine learning gets smarter over time as more data is introduced.

Create a [free Breadcrumbs Reveal account](#) and learn how to get the most out of your ideal customer profile.

CREATE FREE ACCOUNT