**Template**

**Defining Your Customer Avatar**

**Business-to-Business (B2B)**

**Business-to-Government (B2G)**

**About this Template**

This Template has been designed to help business owners and their teams to record the strategic thinking, research and analysis undertaken in the process of defining their ideal customer. This activity is normally done in preparation for product and service development, marketing and other communication activities.

**Disclaimer**

The purpose of this document is to provide you with independent guidance that is educational, general in nature and not specific to any business profile. Headswitch and its partner organisations do not accept any liability for any actions taken by your business in addressing your issues or implementing recommendations identified in this document. You should seek qualified expert advice for activities specific to your business.

**How to Use Your Customer Avatar**

A customer avatar is **a fictitious character that represents your ideal customer**.

Your customer avatar describes the type of person for whom you have created your product or service. They will be profitable to your business, appreciate your solution, and will engage with you in good faith. Creating your customer avatar is a strategic activity that helps you drive performance in key areas of your business.

**4 Good Reasons**

There are four ways to apply your customer avatar to the strategic decision making process:

1. **Create a clear differentiation** - Understanding your customer better than your competitors helps you differentiate your brand
2. **Improve your products and services -** A customer-centric focus helps you improve products and services and present irresistible offers to each one of your customer avatars
3. **Increase Marketing ROI -** Deeper customer insights improves decision making about the message, marketing channels and content for each sales campaign, maximising results and reducing costs
4. **Enhance Customer Experience -** Enhance the decision making process that will allow you to deliver a customer experience that meets their expectations at every touch point.

Your customer avatars should become a living, breathing reference for your decision making, updated as new information is revealed, and used to brief your team and your service providers as they implement your business strategy.

Investing time in developing these answers will help you make better informed decisions and to delegate and brief more effectively to your team members at sales and marketing time. At the end of the day, this enhances your potential for increased revenue, profitability and brand value.

There are two parts to this process:

1. Understanding the Organisational Profile
2. Understanding the Decision Makers Profile

Once you have completed this work, you can move onto defining the customer organisation’s buying cycle and decision making process.

**The Organisation Type**

Government and private business are two industry sectors that suit the You service.

1. Government/Quasi Government
2. Private Business
3. Industry or Professional Associations
4. Social Enterprise
5. Not For Profit
6. Other

**The Industry Sector**

You could consider choosing to focus on one or more of the labour intensive business sectors that require strong productivity, leadership and team management. There may be others:

1. Health & Wellbeing
2. Medical & Allied Health
3. Workplace Health & Safety
4. Medical Technology & Pharma
5. Defence
6. Manufacturing
7. Resources
8. Engineering
9. Technology
10. Agribusiness
11. Professional Services
12. Personal Services
13. Administrative Services
14. Government
15. Emergency & Social Services
16. Other

**The Organisational Profile**

The sweet spot for your services might be an organisation with the following profile:

1. **Size – by employees #**
2. **Size – by annual revenue**

1. **Geographic location**

1. **Who are their customers, and what are they selling?**

1. **What is the organisational style/brand?**

1. **What is the buying cycle for your product or service category?**

1. **What is the decision making process?**

*How many steps? How many people are involved? Who are they and what role do they play? Influencer? Build business case? Sign off?*

**The Decision Maker**

The following describes the decision maker in your ideal customer organisation. Investing time in developing these answers will help you make better informed decisions and to delegate and brief more effectively to your team members at sales and marketing time.

**Customer Avatar Name**

*Give your Customer Avatar a name that will help You to focus on solving their problem*

**Job Title & Responsibilities**

*What is the key focus of their job? Is it about people? Bottom line? Customers?*

**Age/Seniority/Experience?**

*Where do they sit in the decision making food chain?*

**Who are they directly accountable to?**

**Functional problem being solved**

*What is the functional problem? What are the jobs/tasks that need to be undertaken to solve the problem?*

**What is the functional outcome they want?**

How would your customer describe the functional outcome they want to see? How will they measure success?

**Emotional drivers**

*Thoughts, feelings, unhelpful behaviours and reactions to the problem or unmet desire they have?*

**How do they want to feel after your solution?**

*What does a ‘brand new day’ feel like for your customer?*

**Lifestyle interests**

*What kind of lifestyle are they likely to lead? What kind of personal interests might they have? Are they family oriented? Ambitious? Settled?*

**Communication style**

*Are they likely to be very direct, dominating and fast to decide? Do they want a lot of hard evidence, or do they pride themselves on their gut instinct? What is the balance of the two? Are they slow to trust? Cynical? Relationship driven?*

**Professional Values**

*Do they have strong professional values and what is most important to them?*

**Where does the Decision Maker hang out? What trusted sources do they get their information?**

* Online/Offline?
* Industry Memberships?
* News Subscriptions?
* Strategic partners?
* Supply chain partners?
* Specialist consultants?

**What does a typical business day look like for your ideal customer?**

Pre 7am

7am – 9am

9am – 11am

11am – 1pm

1pm – 3pm

3pm – 5pm

5pm – 7pm

7pm – 9pm

9pm – 11pm

*What are they doing during each time period? For example:*

* Showering, listening to Spotify
* Breakfast in front of the TV, flicking through the channels for the news
* Dropping the kids at school in the car, listening to the radio
* Travelling on the train to work, reading a Kindle book
* Grabbing a coffee around the corner from the office
* Reading the ABC news on their iPhone
* Eating a sandwich at their desk, browsing luxury escapes for their next holiday
* Doing a quick eBay or Myer purchase during their work from home day
* Using google to research solutions to a business problem
* Responding to an alert from their LinkedIn page
* Watching sport on Kayo
* Dropping in to the aged care home to visit grandma with the kids on the way home from school
* Helping the kids with their online homework research
* Checking emails after the kids go to bed

| **Customer Avatar Profile** | |
| --- | --- |
| **The Industry** | **The Company** |
| **Geographical Market** | **Other Segmentation** |
| **Decision Maker Nickname** | **Age** |
| **Job Title/Position** | **Income Range** |
| **Photo** *(Example Profile Pic)* | **Education** |
| **Lives** |
| **Interests & Leisure** |
| **Professional Values** | **Communication Style** |
| **Functional Problem or Need** *(What’s the problem they have that they don’t want, or something they want that they don’t have)* | **Emotional Motivators** *(What are they feeling about the problem that they don’t want to feel)* |
| **Functional Outcome Desired** *(Main business outcome)* | **Brand New Day** *(How do they want to feel after using your solution?)* |
| **Preferred Media Channels**  *(Where do they get their trusted information?)* | **Decision Influencers**  *(Who else influences the purchase decision?)* |