Profile Name_____

The following template will help you create customer profiles (or avatars) for your business. Before you begin, you'll need to define the type of customer you're profiling. It can be your most loyal customers, your millennial or baby boomer customers, customers who are fans of a particular product, and so on. These are just a few ideas. Get creative, and don't worry—you can change this later.

Part 1: Demographics

1. What is the typical age range of this customer? _____

Keep the span of this age range to 20 years or less, else you may be trying to squeeze customers together who would instead be better suited to their own group.

2. What is their gender? _____

Choose male, female, or both/not applicable. If your profile includes both men and women, make sure your product and marketing materials are, in fact, gender-neutral. Otherwise, break this out into two separate profiles—one for men and one for women.

3. Where do they live? _____

Pinpoint a specific city or neighborhood. Do they live in a single-family home, apartment, condo, or townhouse?

4. What is their race or ethnic origin? _____

Though not always relevant, race/ethnicity can be important for some businesses like supermarkets and restaurants that specialize in certain cuisines.

In the space below, add any more relevant demographic detail.

Some examples might include: Do they have a specific body type or hair color? Do they drive a particular car?

Part 2: Sociographic

Socioeconomics are the attributes related to household income, education, occupation, neighborhood, and association memberships. You will want to gather this data so that you can insert it as part of your customer profile.

1. What is their occupation? _____

If you can't get specific, think broader categories: office jobs, hospitality, work outdoors, medical, construction/labor, self-employed, and so on.

2. What is their household composition? _____

Are they single, married, or cohabitating? Do they have children and if so, how old are they? Do any other adult family members live in the house? Do they have pets?

3. What is their household income? _____

How much income is this household averaging? Is it a single income, or are multiple people in the household contributing?

4. What is their level of education? _____

Some high school, high school, some college, undergraduate, or postgraduate.

Part 3: Psychographics

Psychographics involve the mental characteristics of your customers: their goals, beliefs, motivations and anxieties. This generally takes a bit more research than demographics since you'll need to speak with customers to find these answers.

1. What is their religion or personal spiritual beliefs? _____

This pertains to organized religion, such as if they belong to the Catholic Church or they are Orthodox Jews.

2. What are their hobbies/interests? _____

You might say sports, pop culture, politics, art, outdoors, theater, and so on.

3. What are their favorite TV shows? _____

Or, if TV isn't relevant, list their favorite movies, books, albums, websites, and so forth.

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4. What problem are they solving by using your product/service?

Try to think less literally (e.g., they eat at my restaurant to solve hunger) and more about the specific motivations that bring them to your business (e.g., they need a healthy fast-food option they can use on their short lunch break).

5. What are the concerns or anxieties the customer may have about your business?

Following the same example, this customer is concerned about long wait times and unhealthy foods that lead to a wider waistline. Other examples might be concern about high price, dishes they're not familiar with, overcrowded interior, and so on.

6. What are some of the potential turn-offs that would make the customer not return to your business?

Aside from their bigger anxieties, what smaller incidents can be offputting to this customer? Are they put off by a dirty floor or table, a shared eating table, stale bread?

7. What would make this customer recommend your business to a friend?

On the flip side, what are some of the elements that would make the customer especially excited about your business?

8. How much are they willing to spend on your type of product?

Also consider: How frequently do they purchase it? Do they purchase for only themselves, or other people as well? Would they be willing to purchase more frequently if there were lower-priced options?

9. List any more important psychographic details:

For example, what are their political beliefs? What is their physical style and fashion? What are they planning for the future (e.g., hoping to start a family, retire soon, travel)?

Part 4: Put Your Customer Profile to Use

Now it's time to pull everything together and start creating plan. How are you going to market to this customer, and what products are you going to sell to them?

1. What are the best ways to reach this customer?

For example, TV, radio, newspaper, Facebook, Twitter, Pinterest, Yelp, in-store promotions, sidewalk promotions, and so forth.

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2. What types of promotions are going to engage this customer?

Are they going to be encouraged by coupons/discounts? If so, how much? Do you need to focus more on other promotions like new products or seasonal products/events?

3. What types of promotions are NOT going to engage this customer?

Along the same lines: Is there a specific channel or promotion that will not work for this customer? Should you avoid direct mail or Facebook advertising?

4. What new products are going to interest this customer?

Do they prefer a particular product/service? What potential changes could you make to encourage them further?