WORLD CLASS BUSINESS OWNER

Lead Your Business To Success

Customer Group Profiling Exercise

The purpose of this exercise is to determine all of the information you can about various groups of your customers to make sure you are catering to their needs and requirements as closely as possible.

Customer Group Profiling should be completed for each major group/type of customers you have. Feel free to leave answers blank of NA if they don't apply.

Name of Customer Group_____

Age Range_____

Where do they live? _____

Typical Marital Status_____

Employed? _____ Pay Range? _____

Do they have any predominant interests? _____

Do these customers have predominant values you can identify? (political/liberal/family/independent etc.)

What they typically purchase from you:

How much do they typically spend?

What else do they typically purchase (not necessarily from you)

What days of the week/specific times do they purchase from you? _____

On a scale of 1 to 10 how profitable is this particular group of customers for you? _____

(They can be large or small purchasers, calculate total amount made from this group of customers

1 least or lowest profitability of customers you serve to 10 highest profitability customer group).

Do these customers typically return make repeat purchases from you?

How long have these customers typically been customers of your business?

How do customers purchase from you?

Online/In Your brick and mortar store or office/Over the phone/Through your representatives

Customers pay cash/credit-debit/on account/Monthly/other_____

How do these customers find you?

Online Browsing/Online Website/Print ads/Storefront/email/cold calling/referrals/ Phone App/ other

Do you have usage date from your website or ads? (How much time spent browsing your site/how much time on particular pages etc.?)

Do you have abandonment data from online shopping?

Do customers typically purchase on their first visit? Second visit? Third visit?

Who is your biggest competitor for this customer group?

Why would this customer group purchase from your competitor rather than your business?

Do these customers recommend you to others? _____ Why? Or Why not?

Do you keep an email list of these customers?

Do you have a marketing program to stay in touch with these particular customers on a regular basis?

What are the top three most important values of excellence to this customer group and the products/services they purchase from you? (Circle top three)

Quality

Value

Timeliness

Efficiency

Environment

Connection

Commitment to The Customer

Self-Management

Teamwork

Innovation

Is there anything else you know or can identify about this customer group?

Provide a summary description of this client group:

Examples:

16 to 27 year old's who are technology savvy and want innovative fast and efficient product downloads for under $50. that they can access and utilize immediately.

Sophisticated 'downtown metro ' foodies who like quality innovative food creations and want a creative and welcoming restaurant environment with excellent self-management and demonstrated commitment of staff to making their dining experience feel very personalized and special.

Guitar players world-wide who want value pricing on guitar strings, picks and other common items with easy ordering and fast shipping.