

FIND YOUR EXACT RIGHT CUSTOMER™

PART 1 OF 6 - START WITH THE PEOPLE YOU WANT MORE OF

Your Exact Right Customer™ values what you do best, has a need you can meet, and is a good fit for how you work. Set aside about 25 minutes to find the patterns.

BUSINESS / MAIN PRODUCT OR SERVICE

DATE

YOUR BEST CUSTOMERS LEAVE CLUES

Think of three customers you would happily clone. Use descriptions or initials. Look for people you can serve well AND profitably. New business? Use likely customers and mark your answers as assumptions.

CUSTOMER 1: WHO ARE THEY, AND WHY DID THEY COME TO YOU?

WHY WOULD YOU WANT MORE LIKE THEM? WHAT DID THEY VALUE?

CUSTOMER 2: WHO ARE THEY, AND WHY DID THEY COME TO YOU?

WHY WOULD YOU WANT MORE LIKE THEM? WHAT DID THEY VALUE?

CUSTOMER 3: WHO ARE THEY, AND WHY DID THEY COME TO YOU?

WHY WOULD YOU WANT MORE LIKE THEM? WHAT DID THEY VALUE?

Look for shared situations, priorities, and buying behavior. Include age, income, or job title only when it affects the need or buying decision.

WHAT DO YOU WANT MORE OF?

PART 2 OF 6 - BUILD A BUSINESS YOU ENJOY

Your business should work for you, too. Think about your values, what you enjoy selling, and the people who make your work feel good.

YOUR VALUES, YOUR OFFERS, YOUR PEACE

WHAT DO YOU VALUE AS A BUSINESS OWNER?

What matters in how you work? Examples: respect, creativity, honesty, or personal time.

WHAT TYPE OF CUSTOMERS ALIGN WITH THOSE VALUES?

Describe how they behave. What would you see or hear when the fit is right?

WHAT PRODUCTS OR SERVICES DO YOU WANT TO SELL MORE OF?

Think about enjoyment, profit, and the work you want your business to be known for.

WHO NEEDS AND VALUES THE THINGS YOU WANT TO SELL MORE OF?

WHAT TYPE OF CUSTOMER BRINGS YOU THE MOST JOY, CALM, OR EASE?

What makes working with them feel that way? Be specific about their traits and behavior.

WHAT MAKES THEM SAY YES?

PART 3 OF 6 - UNDERSTAND THE BUYING MOMENT

Pick one promising customer group. Work through the moment they need you. If two groups buy for very different reasons, complete a separate worksheet for each.

THE NEED, THE TIMING, THE TRUST

WHICH CUSTOMER GROUP ARE YOU FOCUSING ON?

Example: busy households whose cars must be reliable for work and school.

WHAT HAPPENS THAT MAKES THEM START LOOKING?

A breakdown, a move, a missed deadline, a new responsibility? What becomes urgent?

WHAT DO THEY WANT TO BE DIFFERENT AFTER BUYING?

What practical result do they want? How do they want to feel?

WHAT HAVE THEY TRIED, AND WHAT FRUSTRATED THEM?

Include doing nothing, doing it themselves, and buying from another business.

WHAT MAKES THEM HESITATE? WHAT WOULD HELP THEM TRUST YOU?

Name specific proof: a clear estimate, a demonstration, or a relevant customer review.

Use their words. "I need someone who won't rush my nervous dog" tells a groomer more than "pet owners who want quality."

PAIN-IN-THE-BUTT CUSTOMER TYPES TO AVOID

PART 4 OF 6 - KNOW WHO IS A POOR FIT

You do not have to be the right business for everyone. Name the behaviors that drain your energy, clash with your values, or make it hard to do good work.

UP TO FIVE TRAITS YOU WOULD RATHER AVOID

What traits do customers you do not enjoy working with tend to share? List up to five. Focus on behavior and expectations, such as ignoring boundaries, being rude to staff, or demanding work outside the agreed scope.

TRAIT 1

TRAIT 2

TRAIT 3

TRAIT 4

TRAIT 5

WHAT CAN YOU ASK OR EXPLAIN EARLY TO SPOT A POOR FIT?

Choose a screening question, clear expectation, or boundary you can communicate kindly.

BUILD YOUR CUSTOMER PROFILE

PART 5 OF 6 - FIND THE FIT ON BOTH SIDES

Bring both sides together: what customers need and what you want from your business. A good fit lets you serve them well and work sustainably.

WHY YOU, AND WHO FITS?

WHAT DO THEY VALUE THAT YOU DO ESPECIALLY WELL?

Be concrete: patient explanations, flexible pickup, careful work, or local knowledge.

WHAT NEEDS TO BE TRUE FOR THIS TO WORK FOR BOTH OF YOU?

Consider price, service area, timing, capacity, and willingness to participate.

Keep the five traits you want to avoid nearby. Use them to set expectations and screen for fit before you commit to working together.

YOUR EXACT RIGHT CUSTOMER™ IN ONE PARAGRAPH

We are especially right for [specific people or businesses] dealing with [situation / trigger]. They want [result] and value [priority]. They need our [offer we want to sell more of] and choose us because [strength + proof]. Their [behaviors] align with our [values] and bring [joy / calm / ease]. We work best together when [fit conditions].

WRITE YOUR PROFILE HERE

PUT YOUR PROFILE TO WORK

PART 6 OF 6 - CHECK IT WITH REAL PEOPLE

Treat your profile as a working hypothesis. Check it with three customers or likely buyers, then use what you learn to make one practical marketing change.

ASK. LISTEN. ADJUST.

Ask: "What was happening when you started looking?" "What mattered most when you chose?" "What nearly stopped you?" Record their actual words, including anything that challenges your assumptions. Skip names and private details.

WHAT DID YOU HEAR? CAPTURE A FEW SHORT CUSTOMER QUOTES.

WHAT DID YOU CONFIRM? WHAT SHOULD CHANGE IN YOUR PROFILE?

MAKE YOUR NEXT MARKETING MOVE

WHERE DO THEY ALREADY LOOK, ASK, OR SPEND TIME?

Choose a specific group, association, search phrase, or referral partner.

WRITE ONE MESSAGE THAT SPEAKS TO THEIR SITUATION.

Example: "School pickup cannot wait. Get a clear repair estimate before we start."

ONE ACTION I WILL TAKE

BY THIS DATE

Watch for more inquiries from people who fit your profile. Download, fill in, and save this PDF, or print it and write by hand.