Customer Worksheet

Offering Name:	Date:

Segment Name: *Each segment will have its own worksheet*

Relevant Company Characteristics (B2B)
# of employees, Location/language/currency, Market They Sell To, channels they sell through, departmental budget, technologies used, etc.

Buyer 1	Buyer 2	Buyer 3
Characteristics *The relevant ones for your offering: demographics, job function, education, experience, attitude/risk tolerance, products used, goals, worries, etc.* *Role in purchase process: buyer, budget holder, approver, etc.* *Purchase influence: H/M/L*	**Characteristics** …	**Characteristics** …
Purchase Motivation *No more than 3, stack ranked by order of importance* *Specific pains and or desired outcomes*	**Purchase Motivation** …	**Purchase Motivation** …
Gathering Spots *Where groups of these buyers hang out: social media, online communities, events, associations, etc.*	**Gathering Spots** …	**Gathering Spots** …
Information Sources *How these folks find out about stuff: news sources, websites, blogs, magazines/publications, peers, experts, celebrities, etc.*	**Information Sources** …	**Information Sources** …

Black: Indicates what is KNOWN and can be verified through data
Red: Indicates what is ASSUMED and represents a best guess at this time

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