



# Ideal Customer Profile and Buyer Personas Workbook (+ Templates)

Having accurate ICP and buyer personas is the key to highly targeted prospecting and effective sales process.

But do you **really** know who your customers are?

Spoiler: it's often not who you think.

If you're looking to build or update your ICP and create spot-on buyer personas, grab a copy of this workbook packed with handy tips and ready-to-use templates.



# How to Create an Accurate ICP and Buyer Personas?

1

Look at your existing customers and prospects already in the funnel. What do they have in common? What pain points do they share?

2

Interview people within the customer-facing teams., i.e. customer support, customer service, and customer success.

3

Talk to the CEO/founder to understand the story behind your product - why was it created? What problems were they trying to solve?

**Pro Tip:** Make sure to keep the ICP and buyer personas consistent across all departments.

## Taking Action

Try to get 100 customer-related conversations, whether held directly with customers, or with people in the customer-facing roles. Use the questions below to get the information you need:

1

What industry do they work in?

2

What is their job title?

3

What is their budget?

4

What are their pain points? What keeps them awake at night?

5

How do they currently deal with their pain points? What tools/technology are they already using?

6

What are their KPIs?

7

What would success look like for them?

# Types of Buyer Personas

1

## Decision Maker

**Role/title:** typically a VP or C-level Executive

This is the person who controls the budget, and has the final say on whether the purchase should be made. Decision makers may not even see the product before the purchase and often rely on the influencer and the evaluator to identify the value in the product or service.

2

## Evaluator

**Role/title:** director of the department that will be using the product

This is probably the most important person in the sales process (aside from the decision maker) to have on your side. This person is usually the initiator, who spent time evaluating vendors and narrowing it down to one.

3

## Influencer

**Role/title:** End user of the product in the company

The influencer is traditionally a junior-level employee who's asked to research options before their superior is briefed. They don't have the authority to make a final decision, but they do have the power to influence the decision-maker.

**Pro tip:** When doing cold outreach, always try to reach 3 different types of personas from the same company and follow the “5/2 rule,” i.e. contact 5 people from the same company, 2 of which are decision makers with purchasing power.

# Ideal Customer Profile

## Firmographics

Company size: \_\_\_\_\_ employees

Industry: \_\_\_\_\_

Location: \_\_\_\_\_

Primary departments: \_\_\_\_\_

Team size: \_\_\_\_\_ people

Secondary departments: \_\_\_\_\_

## Team structure

## Technographics (filter or signal)

\_\_\_\_\_

## Other indicators (signals)

Company-level use cases: \_\_\_\_\_

## Psychographics

- What problem are they trying to solve with your product/service?  
\_\_\_\_\_
- What are the concerns or anxieties the customer may have about your business?  
\_\_\_\_\_
- What are some of the potential turn-offs that would make the customer not return to your business?  
\_\_\_\_\_

Department	Persona type	Job titles	Priority
1	Decision maker		
	Influencer		
	Evaluator		
2	Decision maker		
	Influencer		
	Evaluator		
3	Decision maker		
	Influencer		
	Evaluator		

# Buyer persona 1

Job title

Name



Other possible job titles:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Responsibilities

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Items to get buy-in

*(Sales collateral or any other means to help this person understand the product/ benefit or convince their decision maker, e.g.: testimonials & case studies, personal demo, one-pager, educational content, tutorials and how-to's.)*

\_\_\_\_\_

## Purchasing power

*(e.g., autonomy to make the decision, high influence, etc.)*

## Why should they care about the Product?

- \_\_\_\_\_
- \_\_\_\_\_

## Challenges & pain points

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Dreams (or motives)

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_



# Buyer persona 2

Job title

Name



Other possible job titles:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Responsibilities

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Items to get buy-in

*(Sales collateral or any other means to help this person understand the product/ benefit or convince their decision maker, e.g.: testimonials & case studies, personal demo, one-pager, educational content, tutorials and how-to's.)*

\_\_\_\_\_

## Purchasing power

*(e.g., autonomy to make the decision, high influence, etc.)*

## Why should they care about the Product?

- \_\_\_\_\_
- \_\_\_\_\_

## Challenges & pain points

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

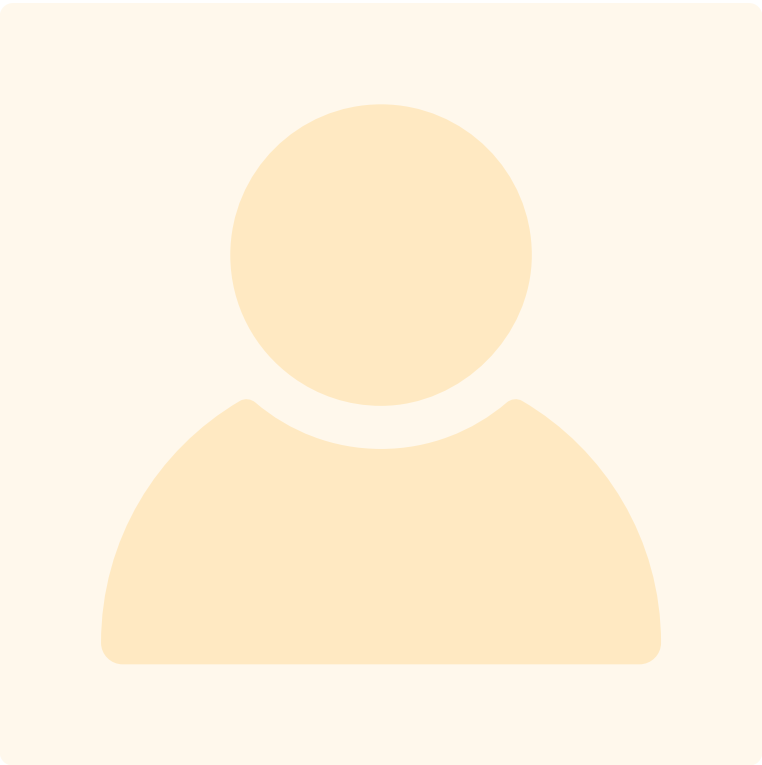
## Dreams (or motives)

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

# Buyer persona 3

Job title

Name



Other possible job titles:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Responsibilities

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Items to get buy-in

*(Sales collateral or any other means to help this person understand the product/ benefit or convince their decision maker, e.g.: testimonials & case studies, personal demo, one-pager, educational content, tutorials and how-to's.)*

\_\_\_\_\_

## Purchasing power

*(e.g., autonomy to make the decision, high influence, etc.)*

## Why should they care about the Product?

- \_\_\_\_\_
- \_\_\_\_\_

## Challenges & pain points

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Dreams (or motives)

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_