

Small Business
Marketing Guide:
**Ideal Client
Worksheet**



BUSINESSLINK

Defining Your Target Market

Essentially, there are two ways that small business owners can go about defining their target markets.

The first is to simply look at who your customers are now and define the ideal client specifically. Businesses that undergo this exercise are frequently surprised to find out who their best customers really are (e.g. the ones that return and refer).

The second, in the case of a business without customers or one that would like to drastically change the market they have attracted, is research. Learn more about primary and secondary research by contacting [Business Link](#).

Review the grid below to help define your ideal client parameters. Use the grid to explore demographic (i.e., factual, observable data) and psychographic (i.e., attitudes, interests, opinions) characteristics that apply to customers or organizations that buy from you. This list is to get you started. Consider what other characteristics might be of importance to your business.

| | Business-to-Business | Business-to-Consumer |
|-------------------------------|---|---|
| Demographic Characteristics | <ul style="list-style-type: none"> • Industry • Size of company (profits, employees or market share) • Geographic area • Corporate structure • Growth | <ul style="list-style-type: none"> • Age • Income range • Geographic area • Gender • Marital status • Education/profession |
| Psychographic Characteristics | <ul style="list-style-type: none"> • Company culture • Historical buying experience <i>Other ideas:</i> • How they are organized (is there a management team in place making decisions) • Are they knowledgeable in a specific area/or not knowledgeable | <ul style="list-style-type: none"> • Personality type • Lifestyle • Historical buying experience <i>Other ideas:</i> • Organized/not organized • Optimistic/pessimistic • Very knowledgeable in a specific field or interest |

Based on your review of the above grid, complete the following template to define your top one to three ideal clients.

Creating My Ideal Client Profile

Canada's consumer neighbourhoods have been segmented into 67 unique lifestyle types by integrating geographic, demographic and psychographic data. Visit Environics Analytics [PRIZM tool](#) and enter your postal code to see your consumer profile.

Business-to-business client profiles can be challenging to create. Start with Statistics Canada's [Business Register tool](#) to see the number of companies by size in your province of interest.

If you need assistance with your market research, contact [Business Link](#).

Create a comprehensive picture of your customers according to their shared demographic, lifestyle and behavioral traits. Discover where they live and understand their preferences to create more effective marketing strategies.



My Ideal Client's Name:

What are the demographic characteristics of my ideal client?

What are the psychographic characteristics of my ideal client?

Who in the organization/family unit is the best person to engage in a sales discussion?

Where do I find these ideal clients, geographically or otherwise?

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