Target Client Profile

Instructions

1. Identify the solution to be profiled and the title of the Decision Influencer.
2. Based on the foundation selections, identify the criteria for each component of the Target Client Profile. This is a tool that helps with the qualification component of discovery. It is possible that not every component is relevant for your selected solution.

Solution: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Decision Influencer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

| **Criteria** | **Description** |
| --- | --- |
| **Size***Units, revenue, number of employees, number of locations, number of hires, growth rate, etc.* |  |
| **Location***Where your brand is strong, growth area for you, your/their headquarters location, your/their field locations, etc.* |  |
| **Business Type***NAICS code or industry, private or public, venture capital-backed, business/consumer/government, etc.* |  |
| **Incumbent***Current provider, managed internally, outsourced function, etc.* |  |
| **Circumstances and Goals***Has issues with…**Has a desire to…**Has challenges with…**Has compliance priorities including…*Has management initiatives including… |  |

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| --- | --- |
| **Criteria** | **Description** |
| **Decision Drivers**New executive hired, acquisition, expansion, relocation, consolidation, launch of a new product, workforce reduction or expansion, fine, lawsuit, or regulatory change – any event that would lead them to be receptive to a conversation about what you offer |  |
| **Corporate Attributes***Financial health, organization structure, and company culture* |  |
| **Buying Process***How they buy, who is involved in the decision-making process, who is driving the decision, active versus passive buyer* |  |
| **Deal Breakers***Converse of target client, aspects that indicate this is not the right account to pursue* |  |