

## **Sample Customer Centric Worksheet**

\*questions can be customized for each business

### **Market Segmentation**

	<b>Best Fit</b>	<b>Worst Fit</b>	<b>Segmentation</b>
Problem Solving For			
Who has the most to gain from what we are doing?			
Who has the most to lose?			
Orgs on board with our mission?			
Primary Considerations			
Are they currently considering this or similar product/service/solution?			
How much education of the product/service/solution is required?			
Key Decision Maker			
Fiscal Year			
Org Size			
Org Type / Industry			
Budget			
Location			
Affiliations			
Current Vendor/Partner (if known)			

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Early adopter or slow to adopt?			
Department Targeted			
Size of Department			

### **Persona**

1. What problem are they trying to solve?
2. Job title
3. Level of education
4. What are their goals as an employee? (cut cost, increase profit, etc)
5. What frustrates them about the current situation?
6. What concerns them about making a change?
7. How do they spend their time?
8. Are they knowledgeable about what you sell? What education is needed?
9. What are they involved in? Any affiliations or clubs? Any related to the product/service at hand?
10. Where do they get their information?
11. Are they a decision maker? Influencer?

### **Content & Device Usage**

1. What types of content does the persona consume currently?
2. What information do they need in order to be informed to make their purchase?  
(Product info, comparisons, price, shipping, etc.)
3. What types of content consumption and actions are occurring on mobile?
4. What types of content consumption and actions are occurring on desktop?
5. What time(s) of day are each of the devices being utilized?
6. Which days of the week are each of the devices being utilized?
7. Does device usage vary by demographic/persona?

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### **Aligning with the Buyer Journey**

<b>Step</b>	<b>Channel &amp; Tactic</b>	<b>Persona</b>	<b>Buyer Stage</b>	<b>Info Needed</b>	<b>Device Usage</b>	<b>Action or Resource</b>	<b>Tracking (Conv or Micro Conv)</b>	<b>Audience Built</b>
1								
2								
3								
4								
5								