
The Ideal *Avatar* Worksheet

When marketing any product or service, one of the first things you should do is develop a customer avatar or an ideal buyer persona that will embody the perfect customer and provide you a target when producing your marketing messages. Developing your customer avatar will show you who buys your products and services. Getting clear on the characteristics of that person will help you find and present them with a message that moves them to action and gets you to the sales you want sooner.

Your customer avatar will impact virtually every aspect of your sales and marketing process. Any part of your marketing that touches the customer will improve when you get clear on who your customer is. I'll walk you through an example of a customer avatar and then give you the worksheet to develop on your own.

There are five major components to the customer avatar. Let's look at each section of the Ideal Avatar Worksheet, step by step. The first thing to do when developing your avatar is give them a name and gender. In this example, I'm going to use a female avatar named Jo.

The first of the components is your avatar's goals and values.

GOALS	VALUES
Jo wants to...	Jo is committed to...
1. Increase audience	1. Building solid relationships with her followers/audience
2. Build a solid/loyal customer base	2. Providing value for her clients
3. Scale her business	3. Providing the best products and services available to her clients.

Make note of the goals and values that are relevant to the products and services that you offer. In your usage of this avatar, you'll use information to attract a live streaming audience with these same goals and values. But, you'll also use this information to drive future product creation, copy-writing, and content marketing.

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Next, look at the “where” of your customer avatar. This section is critical to determine the best places to advertise and the target options you’ll use to reach your avatar by listing their sources of information.

SOURCES OF INFORMATION

Books: How to Write/Tribes **Magazine:** Wired

Blogs/Websites: AdAge/Mashable **Conferences:** SXSW/Content Marketing World

Gurus: Seth Godin/Jay Baer/Jay Conrad Levinson

Other: Spends time on LinkedIn reading content about providing value

Use the “but no one else would” trick when filling out this section of the worksheet. You’ll simply complete sentences like these;

- My ideal customer would read [BOOK], but no one else would.
- My ideal customer would subscribe to [MAGAZINE], but no one else would.
- My ideal customer would attend [CONFERENCE], but no one else would.

The idea is to find the niche books, magazine, blogs, conferences, gurus, etc. your ideal customer would be attracted to-but no one else would.

For example, if you are in the golf products market - you wouldn’t want to assign Tiger Woods as a guru. Tiger is someone that golfers are familiar with, but so is everyone else. Instead, choosing a more niche golfer like Jordan Spieth will allow you to hone in on your ideal customer - and exclude everyone else.

When buying traffic from ad platforms like Facebook, you’ll often be able to target your audience by focusing on these niche interests - while excluding less than ideal prospects.

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Next, applying demographic information will help bring your customer avatar to life.

DEMOGRAPHIC INFORMATION

Avatar Name: Jo **Gender:** Female

Age: 35 **Marital Status:** Single **#/Age of Children:** None

Location: Mesa, Arizona **Quote:** “Build it and they will come”

Occupation: Digital/Social Media Marketing **Job Title:** Social Media Strategist

Annual Income: \$50,000 - \$85,000 **Level of Education:** College Graduate

Other: Spends time reading about marketing strategies to use with her clients

While the usual demographics are important, filling in the ‘Quote’ field can be particularly helpful to get into the heads of your ideal customer.

The demographics are another useful part of the customer avatar when choosing targeting options. And when writing content, e-mail, or live streaming copy it can be beneficial to write simply as though your avatar were sitting across the table from you. Demographic information like age, gender, and location will give your persona a look and feel.

The next section, challenges and pain points, will drive new product/service development as well as content creation and live streaming creative you’ll use to compel your ideal customer to action.

When marketing to Jo, you would do well to build solutions to her challenges and pain points and use language that addresses her in your marketing messages.

CHALLENGES

Jo is challenged with...

1. Scaling her business
2. Finding, training and retaining quality customers

PAIN POINTS

Jo’s pain points are...

1. Fear of losing business to competitors
2. Fear of falling behind the digital marketing scene

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Finally, why would your customer avatar NOT buy your product or services? These are called “objections” and must be addressed in your marketing.

You should also determine your avatar’s role in the purchasing decision. Are they purchasing your product or service for themselves personally or are they purchasing it for their company/ clients? Are they the primary maker or a decision influencer?

OBJECTIONS

Objections to the sale:

1. Will your product or service really help me towards my goals or will I be wasting money?
2. Can you prove that others have shown measurable success using your products or services?

ROLE IN PURCHASE PROCESS

Role in the Purchase Process

1. Jo is the decision maker in her company.

Understanding your ideal customer’s decision-making process is paramount to the success of your marketing and sales campaigns.

You may find that you have multiple distinct buyer personas that don’t neatly fit into one character. That’s fine, simply develop a few avatars that provide you with targets you can approach with your marketing efforts. Any lucrative market segment with a distinct set of goals, sources of information, pain points, etc. is deserving of a customer avatar.

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