

Creating an Ideal Customer Profile

It's important to understand your customers so you can create content, messaging and offerings that fit their specific needs, behaviors, and concerns.

Follow this simple process to start your journey towards understanding them better.

1. Think of customers who are in your "sweet spot" and you love to work with.
2. Why are they in your "sweet spot" and good customers?
3. What market or markets are they in?
4. What do they care about?
5. What is their buying process?
6. Document the information
7. As you learn more about your customers, add it to the profile

Example:

Commercial HVAC

Ideal Client

Buyer is responsible for the equipment upgrades and/or maintenance & is typically in charge of the finances

- Locally owned and responsible for the long-term sustainability of the facilities
- Buildings are typically 20,000 sq. ft or larger
- Manages or owns multiple buildings and locations with components like rooftop units, cooling towers, chillers and process-specific cooling requirements
- Aging infrastructure with both simple (rooftop) as well as complicated (big industrial w/ chillers) systems
- Don't have internal engineers and need technical expertise
- Don't have internal HVAC maintenance staff
- Sales contract of \$20,000 or higher
- Not using bidding process

Market Types:

- Commercial office buildings – Mid-sized to Large
- Industrial – Small to Mid-sized (process-specific cooling requirements)
- Healthcare – Outpatient surgery centres, medical office buildings and facilities
- School districts – Mid-sized public (6-15 buildings) and private (over 40,000 sq. ft)
- Higher education – private, smaller, satellite campuses (<100,000 sq. ft)
- Worship – Mid-sized to Large (over 30,000 sq. ft)
- Arts and performance centres – Mid-sized to Large
- Distribution Centres – Large warehouses with multiple rooftop units (like a Walmart DC)
- Banks – multi-location
- Community Centres and YMCA's
- Data Centres
- Property Management – Manages the above Market Types & guidelines

What They Care About:

- Savings and efficiency
- Want a long-term capital plan
- Consistent temperature, good air quality, and humidity are critical
- Limited to no down time from system failures (quick response from technicians & fix it right the first time)
- Pain point is the trigger: "Equipment keeps breaking and the people in the space are complaining" or "I keep getting nickelled and dimed and it breaks again three months later." Corporate initiative to cut costs
- Transparency to see and understand what has been done by technicians
- Long term care and sustainability of the building (not interested in flipping)

Buying process

Local buyer, "simple" buying process (without bids). Three categories:

- Technical buyer/recommender – plant manager, facilities or maintenance
- Financial buyer – person in charge of the finances, CFO, Treasurer, business manager, could be technical buyer
- Final approver – could be one person or a committee (board, church committee, etc...)

About CMO-OnLoan

With CMO-OnLoan you gain marketing experts who:

- Are trusted and valued members of your team
- Provide expertise to help grow your business
- Have an entrepreneurial and problem-solving spirit
- Provide leadership from planning through execution
- Can connect you to a network of trusted, expert resources

We're Here to Help!

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