BUILDING YOUR CLIENT AVATARS/ICPS:

RB CONSULTING

A STEP-BY-STEP GUIDE

HOW TO USE THIS GUIDE:

This guide is designed to help you think deeply about your ideal clients: who they are, what they value, how they buy, and what challenges they face. The sections below walk you through the key factors to consider as you build out one or more Client Avatars / ICPs for your organization.

You don't need to complete this guide line by line. Instead, use it as a framework to spark discussion and capture insights. The goal is to clarify what makes your best clients tick, so you can better connect with them, address their real needs, and influence their buyer's journey.

We recommend documenting each ICP separately (for example, in a one-pager, slide, or CRM note). Think of this guide as your reference manual for building those profiles.

BEST PRACTICES & PRO TIPS

- **Jobs to Be Done**: Think of the "job" they are hiring you to perform.
- **Behavior-Based Insights**: Focus on actions (early adopter, heavy user, price-sensitive).
- **Emotional Triggers**: Understand the emotions driving their choices (fear, pride, relief).
- **Negative Personas**: Document who isn't a good fit — to save time and budget.
- **Channel Preferences**: Capture how they like to communicate (email, phone, video).
- **Lifecycle Stage**: Note differences between early-stage vs established clients.
- **Visual One-Pagers**: Condense each avatar into a shareable, simple reference sheet.

1. BASIC DEMOGRAPHICS & BACKGROUND

These details ground the avatar in reality and give context for targeting.

- **Name / Persona Label:** Give your avatar a name to make them feel real (ex: "Marketing Mary").
- **Age / Age Range:** Approximate or bracket (ex: 35–44).
- **Gender:** If relevant.
- **Marital / Family Status:** Married, single, with kids, etc.
- **Location / Geography:** City, state, country, or urban/rural.
- **Education / Credentials:** Highest degree, certifications, licenses.
- **Income / Budget / Financials:** Salary range, company revenue, or budget size.
- **Industry / Sector:** The field(s) they work in (ex: SaaS, healthcare, nonprofits).
- **Role / Title / Department:** Their job title or function.
- **Decision Role:** Are they the decision-maker, influencer, or recommender?
- **Work Experience / Career Path:** Snapshot of their professional journey.

2. PSYCHOGRAPHICS, MINDSET & MOTIVATIONS

This is about what drives them, beyond demographics.

- **Goals & Objectives**: What results are they trying to achieve? (Ex: increase retention, expand market share).
- **Values / Beliefs / Identity**: What matters most to them when choosing a partner or solution?
- **Priorities / What Keeps Them Up at Night**: Fears, pressures, or risks they worry about.
- **Objections / Barriers to Purchase**: Why might they hesitate to buy from you? (Ex: cost, risk, past failed solutions).
- **Triggers / Buying Signals**: What events push them to seek help? (Ex: new regulations, lost revenue, leadership change).
- **Motivations / Emotional Drivers**: How do they want to feel? (Ex: respected, innovative, secure, successful).

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3. INFORMATION BEHAVIOR & MEDIA CONSUMPTION

Helps us understand where they look for solutions and who they trust.

- **Where They Learn / Research**: Websites, blogs, social platforms, conferences.
- **Preferred Content Formats**: Videos, whitepapers, podcasts, case studies, etc.
- **Influencers / Thought Leaders / Brands They Follow**: Whose opinions they value.
- **Memberships / Communities / Forums**: Associations, LinkedIn groups, industry networks.
- **Online Behavior / Social Media Habits**: Platforms and frequency of use.

4. CHALLENGES, PAIN POINTS & NEEDS

Clarifies what problems they face and how urgent those are.

- **Current Challenges / Frustrations:** Problems they're actively experiencing.
- **Unmet Needs / Gaps:** Things they wish they had but don't.
- **Risks / Concerns:** What happens if they don't solve the problem?
- **Success Criteria / KPIs:** How they measure success (ROI, cost savings, growth metrics).

5. MESSAGING & POSITIONING INSIGHTS

Guides how we should speak to this client.

- **Key Messages / Value Propositions**: What benefits would resonate most?
- **Tone / Voice Preferences**: Do they prefer formal, casual, data-driven, or story-driven communication?
- **Brand / Provider Perceptions**: What do they already think of us or our competitors?
- **Proof / Demonstrators / Evidence**: What convinces them? (Ex: case studies, ROI calculators, client testimonials).
- **Objection-Handling / Rebuttals**: Common concerns and how we'd address them.

6. BUYER'S JOURNEY / DECISION PATH

Helps us align content and outreach to where they are in their journey.

- **Awareness:** What do they realize? What questions are they asking?
- **Consideration:** How do they research options? What factors matter most?
- **Decision:** How do they choose a provider? Who else is involved in the decision?
- **Onboarding / Use:** What makes the first experience positive or negative?

7. SEGMENTATION & PRIORITIZATION

Not every client is equal — this helps prioritize.

- **Primary Avatar(s)**: Who brings the greatest value or fits best with your services.
- **Secondary / Supporting Avatar(s)**: Still important, but less priority.
- **Scoring / Fit Criteria**: Ideal firmographics (size, revenue, geography, industry).
- **Exclude / "Anti-Avatar" Traits**: Clients you do not want to attract.

REMINDER: THIS IS NOT ABOUT PERFECTION. IT'S ABOUT CLARITY. THE MORE YOU CAN DESCRIBE AND STEP INTO THE SHOES OF YOUR CLIENTS, THE MORE POWERFUL YOUR SALES, MARKETING, AND SERVICE STRATEGIES WILL BE