Tool 3. Customer & ICP Assessment

Customer group / offer: _____ Evidence period: _____

Define the customer using behaviour and economics. Add enough detail for another person to recognise a good-fit account. Record exclusion criteria as well as attractive characteristics.

The Situation, Value and Buying prompts draw on the Jobs to Be Done perspective described in the model library. The worksheet itself is an original Macidton assessment. [33]

WHO: industry, company size, geography, process and operating environment

SITUATION: what changes, why the need matters and why the customer acts now

VALUE: operational, financial or strategic consequences; cost of inaction

BUYING: trigger, decision maker, influencers, budget, approvals and alternatives

Need more copies? Print clean worksheets at macidton.com.au/worksheets

Print as many copies as you need for your own business. No resale or republishing without written permission from Macidton Consulting. Sources are listed in the SME Strategy Workbook.

Tool 3. Evidence and your ICP statement

Measure and definition	Best-fit customers	Other customers
Win rate: define numerator, denominator and period		
Gross margin: use a consistent costing basis		
Sales cycle: define start and finish		
Retention / repeat purchase: state the relevant period		
Cost to serve: selling, support, rework and exceptions		
Strategic fit: explain the criterion		

Our priority customer is

They act when

They choose us because

We will not prioritise customers or work that

ICP confidence: ☐ Low ☐ Medium ☐ High ☐ Unknown

The next evidence needed to confirm or change this profile

Print as many copies as you need for your own business. No resale or republishing without written permission from Macidton Consulting. Sources are listed in the SME Strategy Workbook.