IDEAL CLIENT PROFILE WORKSHEET

Client Name:

Client Contact Name:

Target Contact Job Level:

☐	C-level	☐	VP	☐	Head
☐	Director	☐	Manager	☐	Other

Target Contact Job Function:

☐	Business	☐	Legal	☐	Procurement
☐	Finance/Admin	☐	Marketing	☐	HR
☐	Operations	☐	Support	☐	IT
☐	Sales	☐	Other		

Describe Ideal Account Industry:

Describe Ideal Account Specific Product or Service:

Describe Ideal Account Specific Markets:

Location:

City:	
State or Region:	
Country:	

Target Employee Headcount:

☐	1-4	☐	5-9	☐	10-24
☐	25-49	☐	50-99	☐	100-249
☐	250-499	☐	500-999	☐	1000-4999
☐	5000+				

Technology Stack:

Company Metrics:

Estimated Revenue:	
Estimated Budget:	
Age of Company:	

☐	B2B	☐	B2C	☐	Both

Current Ideal Clients/Companies to Look at:

Primary Department:

☐	0-4	☐	5-9	☐	10-24
☐	25-49	☐	50-99	☐	100+

Secondary Department:

☐	0-4	☐	5-9	☐	10-24
☐	25-49	☐	50-99	☐	100+

Other: