



Client Avatar Worksheet

This is a fillable .PDF file. Fill in all of the information requested
Then, email it to your content strategist prior to your scheduled
on-boarding interview.

Client Name

CUSTOMER AVATAR

Buyer Persona
Marketing Persona
Customer Avatar
Target Market

These are the phrases that are used interchangeably to describe the fictional, generalized representations of the persona that is most likely to buy from you.

It is critically important to the success of your marketing, sales, product development, and delivery of services that you have a deep understanding of who your Customer Avatar is. You've likely heard the phrase, "You can't hit a target you haven't set" this applies beautifully to the importance of having a clearly defined Customer Avatar.

- Having a deep understanding a clearly defined Customer Avatar will help you:
- Determine what social platforms they are spending their time on so that you know where your business should be present and active.
- Be more effective in your advertising. Your marketing dollars will be well spent when you know where to advertise and who to target to maximize your exposure.
- Better connect with your Avatar with your copy because you will have an understanding of their pains, pleasures, desires and wants.
- Deliver and develop better products / services because you are able to anticipate your markets needs, behaviors, and concerns.

SAMPLE DOSSIER



SALLY THE SOLOPRENEUR

Age:	35+
Status:	Married
Location:	Arizona
Gross Earnings:	\$100K
Time In Business:	1 yr +

MEET SALLY THE SOLOPRENEUR

Sally is a solopreneur who is age 35 and older who has been in business for 1 year or more. Sally works alone and runs all part of her business.

Sally has a passion for serving others and loves that she does, but she is starting to see that her dream of freedom, flexibility and control are getting pushed farther out each day. She loves the fact that she owns her own business and that she does have some flexibility but she feels like her business owns and controls her (instead of the other way around).

Sally is successful enough that she is earning close to \$100k a year but she is starting to find herself spending less time doing what she loves and more time dealing with the business side of her business. Sally is at the point where she is overwhelmed by the day-to-day activities of running the business – yet she wants to grow. Her business is no longer rewarding because she is doing things that she is not good at.

Her vision is to become an entrepreneur with the intention of growing her business by hiring a team that can do the things she isn't good at and doesn't want to do and also by automating the mundane tasks in her business that are important but suck up a lot of her time.

She is ready to take on the role of marketing as her full focus. Sally is keenly aware that marketing and systems is the key to taking her business to the next level. Her focus is in growing revenue, creating systems, and positioning her business to scale. By implementing these strategies she will create the cash flow in her business that she needs to hire and add stability.

AVATAR DEMOGRAPHICS

Geographic	
Age	
Generation (ie. Baby Boomer, Millennial)	
Relationship Status	
Education	
Work (ie. Employers, Job Title, Schools)	
Income	
Home Type (ie. Homeowner, renter)	
Average Family Size	
Other	

AVATAR INTERESTS

Business and Industry (architecture, banking, business, construction, design)	
Entertainment (games, events, movies, music, reading, tv)	
Family and Relationships (dating, family, fatherhood, marriage, motherhood, parenting, weddings)	
Fitness and Wellness (bodybuilding, dieting, gyms, meditation, nutrition, physical exercise)	
Food and Drink (alcoholic beverages, cooking, food, restaurants)	
Hobbies and Activities (arts and music, home and garden, pets, travel, politics, travel, vehicles)	
Sports	
Other	

AVATAR BEHAVIORS

Charitable donations	
Digital activities (gamers, facebookadmins, online spenders, small business owners, technology early adopters, late adopters)	
Financial: (insurance, investments)	
Spending: (credit card users, bank cards, retails stores, premium cards)	
Purchase Behavior (kids products, pet products, garden products, clothing)	
Travel	
Other	

AVATAR GENERAL

What are their concerns related to your product / service?	
What has happened in the past that led them to this point?	
How do they feel about what happened in the past?	
What about your product / service matters to this person?	
How does it solve a need, pain, or make them feel good?	
How does it better their life?	
What goes through their mind before they purchase your product / service?	
What is the “final straw” that makes them pull the trigger and move forward with your product / service?	
Other	

ABOUT MISTY



Misty Kortes is a passionate entrepreneur and business owner who has empowered many small businesses to succeed when it comes to marketing their business. With her formal education in Marketing, over two decades of speaking and training, and more importantly her real-life, in-the-trenches business experience, Misty knew she had to share her insider secrets to success with other small business owners. Compelled by a strong desire to share her expert experience and knowledge, Misty created [“Your Marketing Coach”](#) a marketing firm that empowers entrepreneurs to succeed in marketing and accomplish their dreams.

Like many small business owners, Misty understands what it’s like to wear many hats within a business. She knows all too well how overwhelming it is to be the owner, the manager, the technician, and the Director of Marketing for a business...all at the same time! She intimately appreciates the commitment, passion, and drive required to succeed in business today. Which is why she is so passionate about helping entrepreneurs succeed.

Misty is referred to as the “Bootstrap Marketing Coach” because of her ability to come up with marketing strategies that utilize the skills, talents, abilities, and resources that business owners already have at their disposal to take their business to the next level. Because of the vast amount of resources and tools available to people, Misty believes that there is no excuse for not winning in business today. If you have a great product or service that people need, you intimately know the market that it best serves, then all you need to do is fire up the “Bootstrapping Scrapper” within yourself and implement the right strategies. If you do that, nothing will stop you from winning!