



CLIENT PROFILE PLAYBOOK

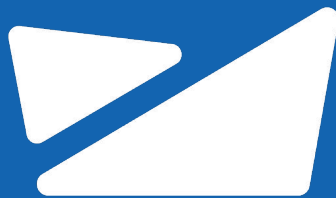
Client: _____

Prepared by: _____

Strategy without tactics is the slowest
route to victory.


Tactics without strategy is the noise
before defeat.

—Sun Tzu, *The Art of War*



Client Profile



COMPANY INFO				
		Company Name		
		Address		
		City	State	ZIP
		Website		
		http://		
		Marketing Budget		
		\$		
Industry	Position			
	<input type="checkbox"/> B2C Service <input type="checkbox"/> B2C Product <input type="checkbox"/> B2B Service <input type="checkbox"/> B2B Product			
Current Marketing Channels				
<input type="checkbox"/> Organic Social Media <input type="checkbox"/> Display Advertisements Social <input type="checkbox"/> Video Advertisements Email <input type="checkbox"/> Word of Mouth				
<input type="checkbox"/> Pay Per Click (PPC) <input type="checkbox"/> Media Marketing <input type="checkbox"/> Marketing Referral / Affiliate <input checked="" type="checkbox"/> Other				
<input type="checkbox"/> Search Engine Optimization <input type="checkbox"/> Content Marketing _____				

POINT OF CONTACT	
Name	Title
Phone	Email

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Name	Title
Phone	Email

POINT OF CONTACT	
Name	Title
Phone	Email

Brand Identity



MISSION STATEMENT

VALUE STATEMENT

TAG LINE

MANTRA



COMPANY CULTURE

TONE OF VOICE

STYLE / AESTHETIC

Do you have a branding style guide?

Brand Fonts

1.	2.	3.
----	----	----

Do you have brand colors?

S.M.A.R.T. 10 YEAR GOAL

Company Principles



WHAT DO YOU DO

HOW DO YOU DO IT?

WHY DO YOU DO IT

Customer Persona



DEMOGRAPHIC

Age	Occupation
Location	Interests
Gender	
Income	

VALUE PROPOSITION

TOP 3 BENEFITS

1.

2.

3.

TOP 3 OBJECTIONS

1.

2.

3.

Customer Persona



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Age	Occupation
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VALUE PROPOSITION

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TOP 3 BENEFITS

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TOP 3 OBJECTIONS

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Customer Persona



DEMOGRAPHIC

Age	Occupation
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VALUE PROPOSITION

TOP 3 BENEFITS

1.

2.

3.

TOP 3 OBJECTIONS

1.

2.

3.

Product / Service CPP



GENERAL INFO

Title

Type

☐ B2C Service

☐ B2C Product

☐ B2B Service

☐ B2B Product

Impulse Purchase (on a scale of 1 - 10):

Market Saturation (on a scale of 1 - 10):

Do you have an asset / photo / video library?

Do you have a CRM or similar tool?

What's your Customer Lifetime Value (CLV)?

What's your Average Order Value (AOV)?

UNIQUE SELLING PROPOSITION

LAST 3 WINS AND WHY YOU WON THEM

1.

2.

3.

Product / Service CPP Continued



LAST 3 WINS AND WHY YOU WON THEM	
1.	
2.	
3.	

² TOP 3 COMPETITORS	
Company	Website
1.	
2.	
3.	