Ideal Customer Profile Snapshot

Give sales and marketing one practical definition of a strong-fit opportunity.

A useful ICP helps your team make decisions. It clarifies which companies deserve attention, how opportunities should be qualified, where marketing should focus, and where your company is most likely to create meaningful value.

Use this snapshot to turn your ICP into a shared decision-making tool your team can reference without reopening the full workbook.

Use This Snapshot To

- Prioritize target accounts
- Qualify inbound and outbound opportunities
- Guide campaigns, content, and website messaging
- Support opportunity planning
- Give AI and CRM tools clearer direction
- Keep sales, marketing, and leadership aligned

Before You Complete It

Build the snapshot with people who regularly interact with customers, opportunities, delivery, and customer outcomes. Their combined experience will help you document patterns your team can recognize and use - not just assumptions about the companies you hope to reach.

If you haven't defined or validated your ICP yet, begin with the Know Who You're Built to Serve Workbook.

How to Complete the Snapshot

1. Choose one offering or buying situation. A company may be a strong fit for one offering and a poor fit for another.
2. Use evidence from current and former customers. Look for patterns in results, profitability, sales experience, retention, delivery, and overall satisfaction.
3. Document the criteria that materially affect fit. Focus on characteristics that change whom you target, how you qualify, or your ability to deliver value.
4. Separate clear patterns from assumptions. Record anything that still needs validation and assign someone to investigate it.
5. Approve and use the final profile. Agree on who owns the ICP, where it will be used, and when it should be reviewed.

Your ICP should be specific enough to guide a decision and flexible enough to accommodate a genuinely strong opportunity.

Finalize Your ICP and Put It to Work

ICP name and offering or market covered

Profile statement

We are best equipped to serve [type of company] that needs [problem or outcome] and has [most important fit conditions].

Core criteria

Industry, size, geography, budget, application, or offering.

Additional fit criteria

The company characteristics that materially affect fit.

Strong buying signals

Triggers and readiness indicators that deserve attention now.

Disqualifiers

The clearest reasons to deprioritize or disqualify.

Assumptions to validate

What still needs evidence, who owns validation, and by when?

Use your ICP for

- ☐ Target accounts
- ☐ Lead qualification
- ☐ Campaigns
- ☐ Website messaging
- ☐ Content and proof
- ☐ Opportunity planning
- ☐ AI and CRM guidance

Approver(s), approval date, and review date