3d Consulting Services
Making Selling Simple

What Clients Want!

How To Discover What Clients Truly Want From You Without Being A Mind Reader!

Tim Dodd

w: www.3dConsultingServices.com
e: sales@3dConsultingServices.com

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Introduction

"Everyone is not your customer."
-Seth Godin

Whether starting a business or trying to grow and expand your existing business, there is a great deal of research involved. The most successful business owners understand the importance of staying on top of industry trends and keeping an ear to the ground at all times. Businesses spend a great deal of time researching their competitors in order to give themselves an edge. But with all of this research, you may be missing the most important piece of the puzzle – your client.

Why You Need to Understand Your Clients Well

It is vitally important to understand not only market trends, (ie., your client in big groups or as a demographic) but also to know your clients on an individual level. Your clients experience your product, service, and brand as an individual, and so this is the level at which you must reach them. You need to use every opportunity available to understand your existing or potential clients.

Take a moment right now to ask yourself a question: What does your ideal client look like? If a clear image doesn't spring to mind immediately, you have some work to do. Or, if you say, "Everyone who has a dog is my client," you have some mindset change and work to do. As the Seth Godin quote at the beginning of this chapter says, not everyone can be your client.

What gives every business its competitive advantage is that it meets specific client needs. It's impossible to be all things to all people. Your client needs to feel like your business is in league with them.

You may want to cast your net wide, and there's not necessarily anything wrong with that. But not knowing who your client is to each exact detail is like shooting in the dark. You will spend a great deal of money, time, and other resources without getting clear results.

If, on the other hand, you know your client intimately, you can use your resources more effectively in order to craft the right message that resonates and perfectly meets your clients' needs. By focusing your message to your target market, you'll attract the right type of buyer, and not waste time with leads that you can't nurture. By carrying out this research continuously, you'll be able to keep meeting the needs of your market even as their needs change.

In other words, by understanding your clients at an intimate level, you can sell more and earn more profit with less effort. Your marketing will create a perfect match between you and your clients. If just launching your business, you'll know where to start (with the client and their needs). If expanding your business, you'll know how to grow and stay relevant.

Getting to Know Your Clients through Research

Research isn't guesswork. It's done by gathering objective data about your clients through a variety of channels. Two of the best methods are surveys and interviews. Through the direct contact these methods provide, your clients will tell you what they want and expect, and a whole wealth of other information.

By the time you finish this course, you'll be able to:

Identify different ways to understand and interact with your ideal and existing clients

Create a survey instrument that gathers the most important data you need to understand your ideal client

Write a list of good, effective interview questions that will help you understand your client at a deeper level than you do currently

Analyze the data you've gathered and create detailed client profiles

Create an action plan to implement surveys and interviews on an ongoing basis to better understand your client and keep up with changes in their attitudes or behaviors.

Learning Activity:

1. What do you know about your ideal client today? What information do you already have about their demographics and psychographics?
2. What types of marketing and sales campaigns are you currently running? Who are they targeted at?
3. When was the last time you surveyed or interviewed your clients?

Methods for Understanding and Interacting with Your Clients

To start, you're going to do a bit of analysis on your own and then figure out how to best interact with your clients in order to gather data. By the time you're finished with this module's learning activity, you'll be ready to start conducting your surveys.

Analyzing Your Product

Start with products or services you offer. If you're an existing business and you've been offering your services for some time, this will be easy. If you're just getting started, you'll need to brainstorm a bit.

Take one product or service and write down a list of its features. Beside each feature, write the benefit that it provides for the client. The difference here between features and benefits is that a feature is some quality or part of the product itself. The benefit, on the other hand, is the subsequent effect it has on the purchaser's life.

For example, let's imagine that your business provides a new kind of content management system (CMS). The CMS allows people to work together remotely and updates in real-time. That's its feature. The result is that your workforce can be spread across the globe but informed about what's going on as soon as it happens, thus increasing your business's efficiency. This is the benefit.

For each benefit that you list, ask yourself: Who does this feature benefit? In the above example, it benefits businesses which are either international in scale, or that hire virtual assistants in other parts of the world.

Existing Client Data

If you're already running your business, take a look at existing client data. Your existing client data offers a valuable shortcut to understanding who your clients are. You may be planning to expand or better target your services, but you can still get some clues by looking at existing clients.

Thus far in your business, what products or services are selling the best among your existing clients? Are there any differences at different times during the year or business cycle? How have buying patterns changed over time? Consider which clients buy the most from you and those from whom you've received positive feedback and referrals.

Starting from Scratch

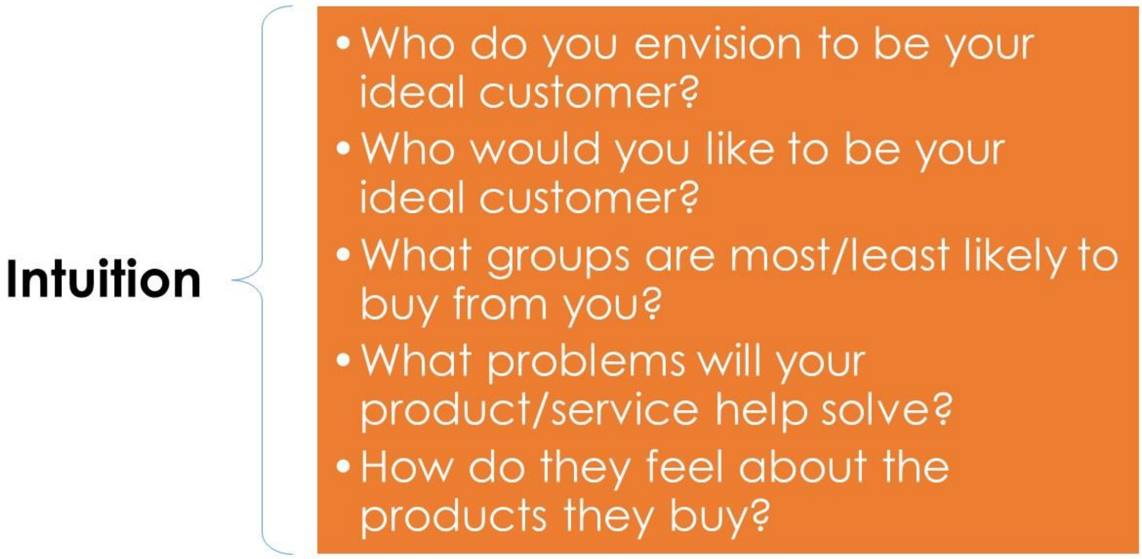
If you're a new business that doesn't currently have a base of existing clients, you can learn some things by analyzing the general market. Start with associations in your industry. See if you can find any demographic data they've done. Look for trade reports, census data, published survey results, white papers, and so on.

You can also learn valuable information by researching your competition. Who do they target and serve? Are there segments of the market that they underserve? One way to do this easily is to "stalk" your competition by following them on social media, reading their blog, watching their YouTube videos, and so on. Look at the comments, reviews and other feedback from clients. You can get an idea of who your competitors serve and also how their clients feel about their service.

One more way to get ideas is to use your intuition. Ask yourself:

- Who do you envision to be your ideal client?
- Who would you like to be your ideal client?

- What demographic groups are most likely to buy from you, and which ones aren't likely to buy?
- What challenges, problems, questions, or pain will your product or service help them solve?
- How do they feel about the products they buy?



Interacting with Your Market

Next, you have to make a plan for how you're going to interact with your market. The internet makes it easier than ever to get in touch with your client base and there are many easy and free ways to do this.

Email

Email is a relatively old method for reaching clients. Long before there were Facebook and Twitter, there was email. And although new means of communication are continually appearing, email is still the old standby. People still pay more attention to email messages from companies they patronize than anywhere else online.

There are several ways to connect with your clients through email. The standard is to ask for their email at the point of sale, promising them deals, news, discounts, and other exclusives they can only get through email. In addition to special offers, it's good to send a client newsletter. This is a way of keeping in touch and it then doesn't seem abrupt if you contact them out of the blue asking them to do a survey. It's also a way to boost post-purchase sales through the exclusive deals you offer.

As part of the content that you send your clients through email, you can also elicit feedback by asking questions or providing a way for them to reach you.

Social Media

By simply having an account on Facebook, Twitter, Instagram, LinkedIn or other social media sites, you can keep in steady contact with your clients. However, it's even better to get further involved with social media, joining forums, groups, and discussions.

While you're using social media, you can also conduct research on your clients. You can look at their profiles, see what's trending, see what other businesses they like or follow, see what content is most popular, and so on. Look especially for gaps where needs aren't being met and what other similar solutions are being offered.

In-Person Events

The internet offers many easy and convenient ways to interact with your clients, but face-to-face interaction is still the most authentic. Take any opportunity possible to actually meet your clients offline at conferences, training events, local community events, trade shows, and so on.

For example, if you hold a booth at a trade show or conference, as part of the stand you can offer a survey on an iPad. The iPad makes it easy and hassle-free for the attendee to take your survey and also easy for you to analyze the results. You may offer some small gift item, freebie, or even a cup of coffee as a way to say "thanks" for taking the time.

Learning Activity

Product/Service Analysis:

1. Write out a list of each feature of your product or service. Beside each feature, list the benefits it provides. Then make a list of people who would benefit from your product or service
2. From the ‘ways to interact material’, select 5 methods that are of interest to you and which you feel are the best fit for your market.

Creating Your Client Survey

The survey instrument is one of the best and easiest ways to elicit data from your clients that you can use right away. You can obtain a great deal of objective and quantitative information, and it's easy for your clients if you create your survey in the right way.

Survey response rates tend to be low. They hover somewhere around 10% to 20% at most, depending on your current relationship with your audience. This is unfortunate, but you can help to raise response rates by keeping surveys short and focused, and by providing incentives. Decide exactly which data is the most important to you and only ask what's absolutely relevant.

When making your survey, it's best to have a mix of "big picture" questions and questions that are highly focused. These "big picture" questions tend to boost response rates because they're easy for survey takers to answer. If there are too many complex questions, this will drive survey takers away. The "big picture" questions also give you a broader sense of who they are and what they believe, while the focused questions elicit more specific information. Try to strike a good balance, but don't overload your survey with questions or your survey takers won't finish it.

There are four types of key information your surveys should solicit: Demographic, psychographic, media and purchasing behavior.

Demographics

Demographic information is hard data about your clients. It includes:

- Age
- Geographic Location
- Gender
- Income Level

- Education Level
- Marital Status
- Occupation and Employment Status
- Languages Spoken
- Ethnicity
- Family Structure / Household Composition

Psychographics

Psychographic information includes data that's a bit more subjective. This data reflects how your clients think and feel. This is information about how they see themselves and the world around them, which is important in deciding how to craft your message to their taste and identity. It includes:

- Personality
- Attitude
- Values
- Hobbies
- Lifestyle
- General Behavior
- Political or Religious Views

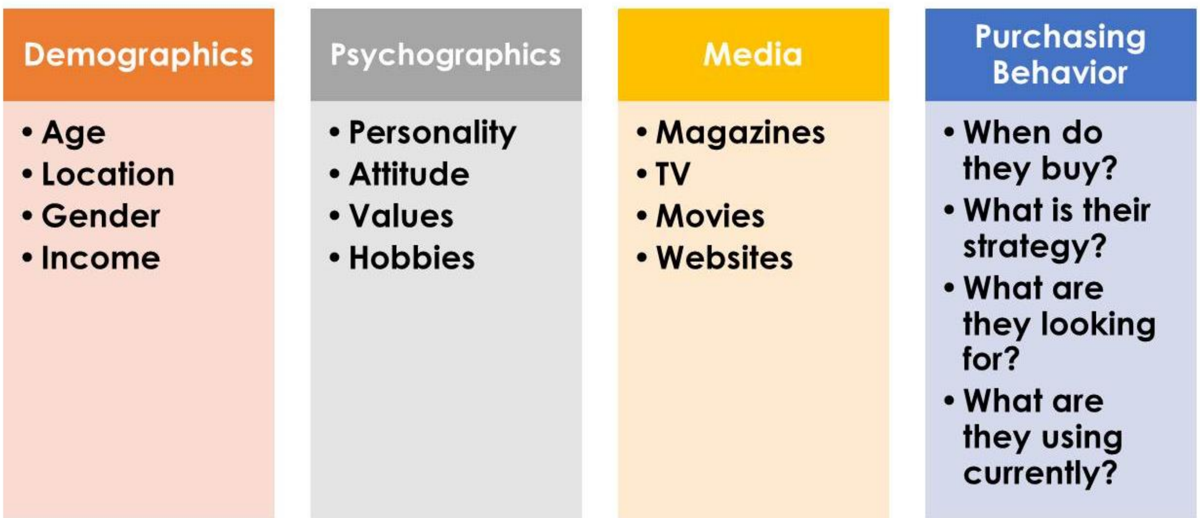
Media

It's important to know what kind of media your client interacts with and where they get information, especially about new products. This might be magazines, TV, movies, websites, or social media. You should then find out information about when they consume this media and details on how they interact with it. Find out what websites they regularly visit and what online services they subscribe to. In the case of social media, find out when they're most active and how they engage with content there (for example, clicks, comments, likes, shares, etc.).

Purchasing Behavior

You need to know how your client makes purchase decisions and about their purchasing strategy. Things to consider include:

- What products does your client regularly buy?
- When does your client normally buy?
- What is their overall buying strategy? In other words, what is the process of making a purchase for them?
- What is your client looking for when they buy a product similar to yours? (What needs do they want to fulfill?)
- Does your client currently use a product or service that's similar to what you offer?
- Which of the client's needs are not being fulfilled?
- What is the factor that pushes your client off the fence and leads them to make an actual purchase?
- How do they use the products or services similar to yours that they buy?



Of course, you don't need to ask all of these things, but choose which are most important or relevant to learning more about your client, and include them in your survey.

Creating Your Survey with Online Tools

You don't have to create your survey completely from scratch. There are many software tools and online services that help you design surveys and analyze them. Survey Monkey is one online service that offers a variety of tools. It has a simple and easy-to-use survey builder, a variety of templates, and tools to help you easily analyze your surveys. Other good services include Google Forms and Pop Survey.

Here are links to some of the most commonly used survey tools:

- Survey Monkey
- Google Forms
- Pop Survey
- Typeform
- Polldaddy
- Client Heartbeat
- Zoho Survey
- Survey Gizmo

Tips for Writing Questions

Using online tools, it's easy to create surveys. The part that requires more attention and care on your part is writing your questions. How your questions are written will determine answer rates and how useful the answers are for your purposes. You need to ask the right questions to get the right answers. Here are some guidelines to follow.

Simple and Direct

Keep your questions straightforward and easy to answer. The shorter they are, the better. Each question should be written to elicit one key piece of information. Try to avoid questions that could be taken the wrong way or misunderstood.

Another thing you can do to avoid confusion is to make sure you don't use any jargon, technical terms, or acronyms. Think of it this way: Any little bump in the road that keeps answering the survey from being a smooth, seamless process may lead respondents to quit.

Closed vs. Open Questions

There are two types of questions: Closed and open questions. Closed questions ask for specific information. These are yes or no questions, rating scales, or multiple choice questions. They give the respondent options for their answer. Open questions are those that ask for opinions or that allow much more flexibility in their answers.

Closed questions give you much more specific information that's easy to quantify and analyze. Your survey should consist mostly of closed questions.

Open questions are good for supplemental information, but this information is much harder to analyze. However, some tools, like Survey Monkey, have features that analyze complex text.

Rating Scales

Rating scales are good because they make it easy for the respondent to answer and easy for you to analyze their answers. When using rating scales, offer one consistent scale for all questions. If each question has its own scale, this requires the respondent to think and re-orient themselves. A consistent rating scale makes it easier.

Odd-numbered rating scales, such as 1 to 5, are the best to use because they have a clear middle number. Five is particularly good because it basically has a rating for great/strongly agree, good/agree, so-so or no opinion, bad/disagree and very bad/strongly disagree.

Giving Your Survey a Logical Order
Think about the ordering of your questions in the same way you would a story. Like any kind of content, it should feel like it has a beginning, middle and end. Start with an introduction and several easy questions to get the respondent into survey-taking mode. Start with broader questions and get progressively more specific and narrower. It's best to put the most important questions near the top since the respondent may stop midway through. Open questions that require a longer response are best to put at or near the end.

Always Test
Never launch a survey without testing it. Have someone take it and go through the entire process of analyzing the data that you get. This will tell you whether the questions are phrased and laid out correctly. After the test run, you may find some areas to tighten up or otherwise modify.

Offer an Incentive
Surveys take time to fill out so offer some kind of incentive to your respondents. This doesn't have to cost you anything. It could be a free trial, free exclusive content, membership, a discount, or a chance to win something.

Survey Promotion Best Practices

Once your survey is completed and tested, you'll need to promote your survey in order to get people to take it. How you'll promote your survey depends on your target market and their needs and tastes, so there will be some variation. Here are some best practices to follow.

Timing. If you're conducting surveys through email, experiment with different times. In general, you can expect the highest response rates during evenings and weekends. Try to imagine times of the day when people check their email.

Online Promotion. Employ all of the regular SEO and social media techniques online that you use for websites or other things for promoting your surveys. Think of it as a website that you want to lead a high volume of highly-targeted traffic to.

Link to Your Survey. Link to your survey wherever possible and use your best copywriting to call people to action. You can link to your survey through social media, blogs or your regular website. You can also use Facebook Ads and other targeted ad networks to reach your ideal market (for example, you can target the followers of your competitors' Facebook page).

Survey Monkey Audience. If you don't have an email list or huge social media following to work with, you can use a feature in Survey Monkey called Survey Monkey Audience. This is a premium feature that offers you a readymade audience through the service for your surveys. You can choose the demographic you want and start getting feedback immediately.

Other People's Audiences. In addition, some marketers tap other marketers' audiences to complete a survey. If you know people who have a similar market to yours, you could simply ask them if they could send out your survey to their clients in return for sharing the data you receive.

Inviting Email Subscribers to Take Your Survey

If you're going to invite your email subscribers to take your survey, make sure the email has a strong subject line. The subject line should be short but clear, and it's best if it has a personal touch. Call it something like "(Your name) Needs Your Feedback." This lets people know before they open it that it is probably a survey.

Be transparent about your survey and explain it well to your subscribers. If they have been specially chosen or if they previously expressed interest in offering their feedback, let them know this. Explain the intent of the survey upfront. Tell them how you will use the survey results. You should also tell them how long it will take to complete the survey. Given them an exact time in minutes based on how long your test run took.

Explain the incentives to them for completing your survey and try to sell it to them, but be honest and transparent. Make sure you give them a deadline and add some urgency to complete it by the set time.

Learning Activity

1. Draft your survey questions on your worksheet, notebook, or a separate document. Then put it into a tool of your choice (Survey Monkey, Google Forms, etc).
2. Based on the survey promotion tips mentioned in this module, what are some ways you'll promote your survey (email, social media, etc)?
3. Draft your survey invitation using the tips above.

Create Your Interview Instrument

Surveys offer an excellent way to gather information about your target market. Open-ended questions give you a chance to gain their detailed thoughts and opinions. But the foremost way to gain this higher quality, deeper information from your clients is to conduct interviews.

Selecting Someone to Interview

Interviews are more involved and time consuming, so you should choose your interviewees somewhat selectively. A few good choices include:

- A repeat client or fan of your brand who really likes your product or service
- A friend, colleague, co-worker, or someone in your network who fits your ideal client profile
- Someone you met at a conference or trade show who expressed a great deal of interest in what you offer
- People who are highly engaged with you on social media or email and fit your ideal client profile

It's best to conduct the interview in-person. It should be as personal as possible and you want to be able to pick up body language and other non-verbal clues. Offer to buy the person coffee or lunch and make it a casual affair.

If it's not possible to conduct your interview in-person, you can do it over Skype or by phone. Offer to send them a gift card or some other "thank you" for taking the time. Don't conduct group interviews as a norm since some people may feel intimidated or influenced by others' answers. Your data won't be as objective.

Try to interview at least five people from each market subset. If you can do more than that, this is great, but you need at least five. You need enough interviews so that you can start seeing trends. If you have fewer than five interviewees, your results will be skewed. The sample is too small.

How to Conduct Your Interview

Like your online survey, you should tell the interviewee what to expect, including the length of the interview. It should be no more than 30 minutes. It's even better if you can make the interview shorter. The 15 to 20 minute range is ideal.

Try to make the interview all about the interviewee. Although you're looking for information related to your products or your brand, the questions and discussion should be geared toward the interviewee. Let them know that you want to understand them, how they do their job, what they're biggest challenges are, or how they use your products. Keep in mind that this personal information is what will be valuable from the interview.

Figure out a way to record the interview. You can use an app, your phone, or another tool. If you interview someone over Skype, there are recording apps you can download, such as the free MP3 Skype Recorder.

You'll want to record it so that you don't miss anything and your data from the interview is accurate. Make sure the interviewee understands that the interview will be recorded and only be used to confirm what they said. Test your recording device before the interview and choose a quiet area to conduct it.

Take notes during the interview of the most important points. You can refer back to the recording, but it's good to also take notes as you go. You may want to have someone else with you who can take notes as you ask questions. As soon as the interview is finished, review and summarize your notes while they're fresh in your mind. When you do this, it's easy to grasp the information in a "big picture" way.

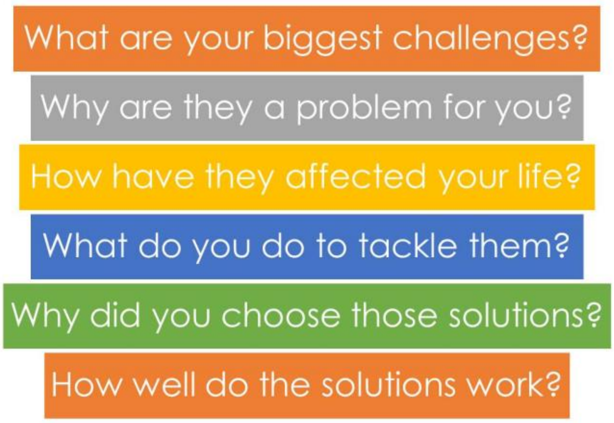
During interviews, never try to sell anything. Your goal is just to collect information. If you start selling or promoting, it can alienate your interviewee and make them question your goals. Everything should be upfront, transparent, and honest.

Tips for Effective Interviews

In conducting surveys, it's best to use closed questions in order to get specific detailed information. With interviews, this is your chance to learn more about what your target market thinks, so it's better to ask open-ended questions.

Instead of asking yes/no questions or offering multiple choice, ask questions such as:

- What are the biggest challenges you face in your life or work? [relative to your business focus]
- Why are those challenges a problem for you?
- How have those challenges affected your life or work?
- What do you do now to deal with those challenges?
- Why did you choose those solutions?
- How well do those solutions solve your problems?



These are probing questions that seek more details. Wherever appropriate, ask follow-up questions to get the interviewee to expand on their answers.

Avoid using a rigid script. Create a list of the most important questions and plenty of back-ups, but be spontaneous as well. Interviews can often go off-script. Just make sure that the improvised questions will lead to the information you need to know.

Be open-minded and prepared for surprises. It's really important that you don't try to lead an interview to certain conclusions or impose your own ideas on it. Instead, you should try to see the world from your interviewee's perspective.

Interview Sample Questions – Your Interviewee's Business

- How would you describe your business?
- Who is your ideal client?
- What is the main challenge you face when it comes to your business or the service you offer?
- How has this challenge affected your life? What benefits have you gained from it and what problems has it caused?
- What would your life be like if you could meet and overcome this challenge or solve this problem?
- What solutions have you tried in the past and what was the result? How could the results have been better?
- What is keeping you from solving the problem now or seeking a new solution?

Interview Sample Questions – Your Product or Service

- What led you to purchase our product or service? What was the #1 reason?
- What results have you achieved?
- How have these results been different from other products or services you've tried?

- What was the #1 thing that made you hesitant to make the purchase? What were you afraid of?
- Looking back now, do you feel that this fear was justified or does it seem baseless?
- What is the biggest benefit of using the product or service?
- How has using the product or service affected your life?

Learning Activity:

1. Draft your interview questions. You can use the sample ones from the modules as your basis.
2. Based on the target interviewee suggestions in this module, list 5 or more people you might interview.

Analyze Your Data and Create Client Profiles

Once you have your survey and interview questions ready, you'll want to decide how you're going to analyze and use this client data to create profiles.

Most survey tools will give you access to your data reporting and results of your survey after it's finished. Use this data to look for trends among your respondents in the four categories mentioned earlier of demographics, psychographics, media and purchasing strategy.

If you have other data about your clients and their buying behavior in a CRM or database, you may want to export the data from your survey and merge it with this other data. Information such as purchase amount and purchase date can be very valuable for creating client profiles.

While analyzing your data, you should identify the traits that apply to your primary target client. You should also consider lesser trends as traits of your secondary client and create a profile for them as well. Identify the key demographics and behaviors based on the trends your data reveals.

Creating Your Client Profile

Take any major trends that you see overwhelmingly represented in your respondents and write these into a basic client profile. For example, if a particular age group, income level, employment status or gender is predominant, this is a feature of your primary target. If there's a noticeable trend but it's not quite so overwhelmingly represented, create a secondary target with it.

Your initial profile should be very specific in its details. Here is an example:

> The primary buyer of a tutoring service for high school students is a 40-50 year-old female who is married and has two children aged 6 to 16, and has a household income of $65-80,000 per year.

You can create a targeted profile from your survey data alone. However, you also need to look at any open-ended questions and sift through these answers for more clues on your target clients. You can also use Survey Monkey's advanced text analysis to make the sifting easier.

Analyzing Your Interview Data

In addition to your survey data, your interview results will give you more detailed and qualitative information. You'll need this information for the best, in-depth picture of your clients.

Your interview questions will have to be sifted through to find trends, but if you took good notes or had your recorded interview transcribed, this will help. As you conduct more interviews, you'll get better at identifying the information that is most significant during the interview or when you're reviewing immediately afterward. Try to add some of this attitude or opinion-oriented data to your client profile in addition to demographics.

The best way to analyze interview data easily is to create a spreadsheet for presenting the results. This way, you can scan the cells for each question and see trends. Look for key words or themes in the responses.

For example, let's say that you asked the question, "What was the #1 reason you purchased our product or service?"

Answers might include:

- My friend told me she liked the product
- The client service rep at the help desk was very helpful
- My mother mentioned it to me

For each response, you can assign a category or code. The first and third answer could be coded "Word of Mouth," while the middle answer might be "Client Service." This gives you a more quantitative way to analyze these subjective, qualitative results.

Putting It All Together

When you create your client profiles, you need to combine quantitative information from surveys, such as demographics or media habits, with qualitative or subjective data from open-ended questions and interviews. Both types of information are extremely critical in creating different client 'personas' that give you a clear picture of who you're targeting in your market.

Your fictitious client descriptions should feel like real people, and you can even give them names. You'll then use the personas to guide all of your business decisions, such as content creation and product/service development.

The best way to create your personas is to start with your quantitative data. Look at the trends among respondents and create a simple profile that includes this data. Most will be demographic, such as the example we gave before for the tutoring service, although you may have some psychographic or purchasing data you want to include too.

Next, add qualitative data from your open-ended questions and interviews in order to fill out your profile and draw a more complete picture. Your complete client persona should have short fields where you have demographic information like age, gender, location, and so on, along with some areas for things like "Fears," "Goals," "Values". These qualitative fields will be bigger.

Rather than numbers, use sentences or short phrases here. Try to pare your profile information down to make it as succinct and easy-to-digest as possible. For example, if a common response is, "I worry that I'm going to end up buying something that I won't get full use out of," you should write something like, "Worries about use-value."

You may want to include quotes in your qualitative information. You can take quotes directly out of your interviews and put them into your client profile as-is. However, if you ever want to use the quotes publicly, be sure to get that person’s approval first.

As you go through the qualitative data, adding things like goals, fears, or feelings about purchasing to your profile, you may start thinking of ways to address these psychological factors. You might want to add a summary or elevator pitch to the end of your profile. This would summarize why your client buys from you, and addresses ways you can meet their needs.

Other possible things to include are:

- The experience the client wants
- How the client is evaluated (at work)

- A day in the client's life
- Information resources
- Objections to purchasing your products
- How that client usually finds you

Here’s what a simple client persona might look like for one typical client of a social media marketing consultant who works with small businesses:

Client Profile 1

Name: Sarah
Title: Small Business Owner

Nutrition counseling and products

Key decision maker with 2 assistants

Demographics:
Age 40-49

Majority female

$75,000/year

Suburban

Master’s degree

Married, 2 children

Values:
Family first

Making an impact on people’s lives

Goals and Challenges:
Relying too much on 1:1 counseling for income

Not enough time with her children

Needs to increase income due to rising costs of providing for children

How we can help:
Set up and manage a social media ad funnel to bring in new prospects

Set up and manage posting to her social media profiles/groups

Get more mileage from and traffic to her older content

Fears:
Afraid clients will leave (client retention)

Worried about how credible she appears to prospects

Objections to purchase:
Won't be personal if someone else does her social media

Her reputation could be harmed if done badly

Won't get enough results to justify the expense

Our Unique Value Proposition:
When we manage your social media, it's as if you just cloned yourself. We work closely with you to get a deep understanding of you, your business values, and the goals you have for your clients.

Also, take a look at the excellent sample client personas here to get ideas of what you might include in your own:

Click here to see sample buyer personas from HubSpot

The most important thing to remember is that no two client profile templates are alike. You need to create one that includes the information that's critical for your own business. Include the information you need for making decisions about your content and products/services.

It's also very likely that you will find more than one trend among your clients. In other words, you'll have more than one client profile to create. If this is the case, create multiple profiles but keep it to 3 at most. With 3 profiles or less, you can still target your marketing, but if you have more than this, it will be difficult to create a unified message.

Learning Activity:

Once you've received answers from your first survey, review the data that your survey instrument provides. Download the report and note trends you see. Use that data to create an initial client profile.

Once you've already conducted your interviews, create a spreadsheet or use the provided worksheet to analyze the answers you received.

- Based on what you know to-date about your clients, craft a more complete sample profile statement of your primary target client. Use a fictitious name for your profile and include more than one profile if the data makes sense for you to do that. **Use the template provided as a guide only.** Create your own based on the information you collected.

Conclusion: Putting It All Together and Next Steps

Now that you know how to make and implement surveys, it's time to get started gathering more valuable data about your target clients.

Whether you're just starting your business or you have an established business already in operation, knowing and understanding your clients well is the key to success. Your target client's needs may change or evolve over time, and if you're continually seeking data about them, you'll always be able to refine and update your profiles. Gathering and analyzing this data should be an ongoing part of your business.

Through the course, you've learned:

- The importance of understanding your target client's tastes, problems, and preferences in-depth.
- The many different ways you can obtain information directly from your clients in order to create a client profile or persona
- What kind of data you need to obtain through your surveys and interviews
- How to go about creating and implementing a survey
- Tips on how to conduct interviews and analyze results
- How to put it all together and write in-depth client profiles.

Now, it's time to complete your action plan from the learning activities you've done throughout the course, and remember to set a deadline for each action you have to take.

Learning Activity:

- Review the module on 'Surveys'. Now that you have your survey questions ready to go, some ideas on how you'll promote, and sample invitational content drafted, you'll need a plan to carry this out.
- Provide a go-live date for your survey launch and promotion.
- Review your survey invitation content. Refine and finalize this.
- Review the module on interviews.
- Review and finalize your list of potential interviewees.
- Plan target dates to complete these.
- Call or reach out to each participant and get these scheduled.
- Next, review your action plan; schedule any outstanding activities; and implement your survey and interviews.