

ICP + Target List Exercise

Client Name: _____

EOS® Implementer: _____

Date: _____

A focused Ideal Customer Profile (ICP) creates clarity, traction, and alignment. Without it, your business development team lacks clear direction on which target audiences best fit your unique value proposition.

Step 1:

Identify Your Best Clients and their Key Traits

Who would you consider your best clients based on attributes such as revenue, profitability, win rate, longevity, ease of doing business, referrals, or cultural fit?

List their key traits, such as:

- Demographics – industry, size, geography, company age
- Triggers or Mindset - buying triggers, pain points, needs, values
- Buying process - titles of decision-makers, how they found you, lifetime value, purchase frequency, referrals, decision criteria

Best Client	Key Traits

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Step 2

Extract Insights from Common Traits

- Where are you winning most reliably and profitably?
- What do these customers value? How does that align with your Three Uniques™?
- What's driving them to consider and select you?

Step 3

Define or Refine Your ICP

- Prioritize segments or verticals
- Identify their triggers and needs
- Consider who, when, and how they make buying decisions
- Identify key messages that align with our Three Uniques™

ICP Name: _____

Industry

Company Size

Location

Decision Maker Titles

Pain Points

Values/Mindset

Buying Process/Triggers

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Step 4

Build a Target List

Once you have identified your ICP, rate customers and prospects on how well they align with this ICP by giving each a 1-5 score on each attribute.

Then, build new “look alike” prospect lists based on the customers and prospects who rate highly against your ICP.

Next Steps

Building the ICP is just the first step. Here are some ways to bring your ICP to life and socialize it through the organization.

- Add a Quarterly Rock to Refine ICP + Build Target List
- Train Sales on the ICP
- Update sales materials and messaging to reflect this ICP
- Build “look alike” prospect lists and add them to your CRM