

FitzGerald & FitzGerald, P.C.
Customer Definition Questionnaire

If you have separate product lines, you might need to do this exercise for each major product line.

Are you selling to businesses or individuals or both?

Type of Entity

If Business:

- Is it a large or small business?
- Do they have multiple sites?
- Is it a nonprofit or governmental agency?
- Is it an end user or do they resell your products?
- Are you selling to the business or to an individual inside the business?
 - Examples would be CEO, Purchasing Agent, Marketing Director
- Is there a specific industry that would use your product or service?
- Are there businesses that you don't want to buy your product?
- Can you sell to others in the same industry?
- List any additional considerations for businesses to become great customers.

If Individual:

- Is it primarily for males or females?
- What age range will use your product?
- Is it for someone in a particular industry?
- Does someone need specific knowledge to use your product?
- Describe other characteristics of someone who would buy your product?
- Describe the characteristics of someone who you don't want to buy your product?

For Both Situations:

- Are you selling over the internet or in person?
- What is your preferred sales method?
- Is there a geographic range that you sell to?
- Are there areas that you would like to avoid, such as additional states because of sales tax considerations?
- Are there other products or services that your product works well with?
- Do your customers need your product or service or is it a case of want?
- Is your product affordable or do your customers need to be prequalified to determine if they can afford it?