



Example Ideal Customer Persona

Understanding your ideal customer is the foundation of a successful marketing strategy. By defining their attitudes, concerns, and buying habits, you can tailor your messaging and approach to attract and convert the right clients. Below is a detailed example of an ideal customer persona to illustrate how this process works.

Name: Dave Smith

Job Title: Managing Director

Industry: Engineering Consultancy

Business Size: 10-50 employees

Location: UK

1. Attitudes & Mindset

Dave is highly analytical and prefers structured, logical decision-making. As an engineer, he values data, efficiency, and precision in all aspects of his business, including marketing. However, he has a deep scepticism about marketing, viewing it as an unpredictable expense rather than a strategic investment.

- Sees marketing as a creative, unstructured activity, making him wary of it.
- Believes word-of-mouth and referrals should be enough to sustain growth.
- Feels frustrated when competitors with inferior offerings gain more visibility and clients due to better marketing.
- Prefers systematic approaches that mirror engineering processes—step-by-step methodologies appeal to him.
- Appreciates direct, no-nonsense communication and dislikes jargon or marketing buzzwords.
- Has a strong sense of accountability and responsibility, making him cautious about any business investment.
- Seeks control over his business's marketing efforts but lacks the expertise or time to develop a structured approach.
- Wants measurable, predictable results from marketing rather than “gut-feel” experiments.

2. Questions, Concerns & Objections

Dave is full of questions and concerns when it comes to marketing. Before making a commitment, he needs reassurance that marketing will deliver tangible business benefits. Some of his key objections include:

- “How do I know this will work?”
- “We’ve tried marketing before, but we never saw any results.”
- “Marketing feels like a black hole where money disappears.”
- “We rely on word-of-mouth, and it works – do we really need marketing?”
- “How do I measure whether this is worth the investment?”
- “Will this distract my team from delivering projects?”
- “How do I get my team on board? They’re engineers, not marketers.”
- “How does marketing integrate with our sales process?”
- “How do I maintain control over marketing without it becoming another full-time job?”
- “Will I be locked into an expensive, long-term commitment?”
- “Do I need to hire a marketing person, or can I outsource this?”
- “How can I ensure that marketing aligns with our technical expertise and business strategy?”
- “How do I get my team on board? They’re engineers, not marketers.”
- “What kind of ROI can I realistically expect, and how long will it take to see results?”
- “What marketing activities are the best fit for a technical business like mine?”
- “How do I ensure marketing aligns with our sales process and doesn’t create friction?”
- “Will I need to hire a dedicated marketing team, or can I upskill my current staff?”



3. Buying Habits

Dave takes his time making decisions, especially when it comes to financial investments in his business. He conducts thorough research before engaging in any marketing initiative and relies heavily on logic and data.

- Relies on peer recommendations, trusted advisors (e.g., accountants, business coaches), and industry-specific sources.
- Spends months researching before making a decision.
- Prefers data-driven case studies over testimonials or broad marketing claims.
- Rarely acts on impulse; needs to see logical reasoning behind decisions.
- Wants a structured, step-by-step approach to marketing, similar to engineering methodologies.
- He looks for proven frameworks rather than experimental tactics.
- Attends industry events but prefers learning from engineers over marketers.
- Values free educational content (white papers, webinars, workshops) before committing.
- Prefers to trial new ideas in a low-risk way before fully investing.
- Reads technical reports, and business strategy books, and listens to industry podcasts rather than mainstream business content.
- Avoids sales calls unless they provide clear technical or business value upfront.

4. Influencers in the Decision-Making Process

Dave rarely makes decisions in isolation. Several key players influence his choices, making it essential for marketing strategies to account for these influencers.

- Business Partners or Senior Leadership: Any significant investment, including marketing, must align with the broader business strategy.
- External Consultants, Accountants, or Business Coaches: Dave often consults trusted advisors who have experience in business strategy and operations.
- Industry Peers: Engineering colleagues and business owners who have successfully implemented marketing strategies provide valuable insights and recommendations.
- Sales Team (if applicable): If Dave has a dedicated sales team, their feedback on the effectiveness of marketing efforts will heavily influence his decisions.
- Industry-specific publications, LinkedIn groups, and professional networks.



5. Red Flags (Poor Fit Customers)

Not every business owner is a good fit for structured, strategic marketing. Some warning signs indicate that a potential customer is unlikely to benefit from the approach we advocate:

- Business owners looking for “quick fixes” rather than a long-term strategy.
- Those expecting immediate results without understanding the importance of testing and refining marketing efforts.
- People seeking a fully outsourced solution with no involvement in the process.
- Individuals who are unwilling to invest time in strategic planning or learning basic marketing principles.
- Business owners who constantly switch marketing strategies without evaluating results.
- Companies lacking clarity in their business goals or struggling with internal alignment on marketing initiatives.

6. Demographics & Preferences

- Education: Engineering degree, often with an MSc or business training.
- Preferred Communication: Email, LinkedIn, industry networking events.
- Attends industry events and conferences but is skeptical of “salesy” presentations.

Next Steps

Now that you’ve seen an example of an ideal customer persona, it’s time to create your own. Take the time to define your ideal customer’s attitudes, concerns, and decision-making process. Use this insight to refine your marketing strategy and tailor your messaging to attract the best-fit clients. If you need guidance, revisit the exercises in this chapter or explore our templates to get started.

