



Customer Assessment

Date: _____

Client: _____

How To Use This Sheet:

You are not marketing to everyone.

This worksheet will help you put yourself into your customer's mind (ideal or current customer).

It will guide you on how best to help and market to your customers. Please feel free to reuse this.

This singular sheet can be found at ajkallas.com/assessment

1. Client Identity:

Who are they?

What do they want?

2. Client's Problems:

External Problems (Physical)

Internal Problems (Emotional)

Philosophical Problems (Ethical)

3. Your Identity:

How do you offer Empathy?

How do you offer Authority?

4. Your Plan:

Describe Your Plan For

Your Customers in 3 Steps

1. _____

2. _____

3. _____

5. Calls to Action:

What Direct Action

do you want them to take?

What about a Transitional Action?

6. Tragic Results:

What do they miss out on if they
don't do business with you?

7. Successful Results:

What results do they receive

from having interacted with you?

8. Transformation:

How will their lives be different
from having done business with
you? What life will they get to live?
