



Y4.02

BUSINESS CONCEPT
/Customer Portfolio

DECISION SHEET

v2.2.1

Job to be done

By actively choosing the customers we want to work with, we get the most out of our sales and marketing efforts.

To help confirm our gut feeling about which customers to pursue, we can make a scorecard that can help us decide on which criteria we want to prioritize our customers.

How to do it

Start by listing the customers you want to prioritize, either your current or future. Write down the customer segment and/or the name of the individual customer. Next, go through the suggested criteria for scoring customer value and change them if you like.

Continue by deciding if all criteria should have the same weight or if you want to change the weighting of certain scores (e.g. to 1x, 2x or 3x).

Finish by giving scores (1-5) for each customer or customer segment and calculate the total scores.

Next Step

- Explore the specific needs of your most valuable customers.
- Make an action plan on how to fulfill the needs of your favorite customers.
- Make specific sales and marketing materials for your favorite customers.

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Favorite Customers

Focus on the most valuable segments and customers



CUSTOMERS		CRITERIA FOR CUSTOMER VALUE								TOTAL SCORE
Current or future customer segments	Current or future customers	Short term value	Long term value	Value of referral	Easy to access	Customer loyalty	Shared values	Interesting tasks		
Weight in total score										

Date:

Name:

Company: