WHO ACTUALLY BUYS FROM YOU

A DEMOGRAPHIC AUDIT BUILT AROUND EXPECTATIONS

This is not a persona exercise. Personas tell you demographic facts. This worksheet asks something harder: what did your customer expect when they found you — and did they get it?

The gap between expectation and reality is where customers are won and lost. Your best customers are people whose expectations you met or exceeded. Your lost sales are situations where the gap was too wide to close. The pattern between those two things tells you more about your marketing and your offer than any analytics dashboard.

Work through this with real, specific customers in mind — not idealized ones. The insight lives in the specifics, not the averages.

HOW TO USE THIS

1. Use real people you remember specifically — not composites.
2. For "what they expected" — write what they thought they were getting, not what was reasonable for them to expect.
3. For lost sales: resist blaming price. Dig for the expectation that went unmet.
4. The synthesis section at the end is where the real insight lives. Do not rush it.
5. The expectation statement you draft at the end should become the foundation of your marketing copy.

Continue to page 2 to begin.

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BEST CUSTOMER 1

Think of a specific real customer you remember clearly. Answer based on that person.

Industry or business type. Role of the person you dealt with.

How long have they been a customer, and how did they find you?

What specific problem were they trying to solve when they found you? Not what they told you first — what was actually going on?

Before they bought, what was their mental picture of success? What did they expect to receive — specifically?

What tipped them toward choosing you over other options?

What were they most worried about before buying?

What did they actually receive? Describe it the way they would describe it.

Did what they received match their expectation? (Circle: Yes / Mostly / Partially / No) How so?

Did they come back, expand the relationship, or refer others? Why do you think that is?

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In one sentence: what did this customer actually buy from you — not what you sold them, but what they were really purchasing?

BEST CUSTOMER 2

Think of a specific real customer you remember clearly. Answer based on that person.

Industry or business type. How did they find you?

What problem were they solving? What did they expect before buying?

Did reality match their expectation? (Circle: Yes / Mostly / Partially / No) How so?

Did they come back or refer others? Why?

In one sentence: what did they actually buy from you?

BEST CUSTOMER 3

Think of a specific real customer you remember clearly. Answer based on that person.

Industry or business type. How did they find you?

What problem were they solving? What did they expect before buying?

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Did reality match their expectation? (Circle: Yes / Mostly / Partially / No) How so?

Did they come back or refer others? Why?

In one sentence: what did they actually buy from you?

LOST SALES — WHAT WENT WRONG?

For each recent lost sale: what were they looking for and what expectation went unmet? The stated reason a prospect gives and the real reason are often different. Write both when you know them.

What they were looking for	Stated reason (what they said)	Real reason (what you think)	Expectation unmet

COMMON LOST SALE REASONS — CHECK ALL THAT APPLY

- ☐ Price was higher than they expected
- ☐ We did not follow up quickly or clearly enough
- ☐ Our process felt complicated or unclear to them
- ☐ We were targeting the wrong customer profile
- ☐ They did not understand the value of what we offer
- ☐ They found something that better matched their expectation
- ☐ The first impression did not build enough trust
- ☐ Other: _____

Notes on what you see in your lost sales:

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SYNTHESIS — FINDING THE PATTERN

Look across all three customer profiles and your lost sales. The patterns you find here should directly shape your marketing, your offer language, and how you describe what you do.

What do your three best customers have in common that you have never explicitly said out loud?

What expectation do your best customers arrive with — before they have spoken to you?

What does your current marketing promise, and does it match what your best customers actually expected?

Looking at your lost sales: what is the single most common expectation you failed to meet?

DRAFT YOUR EXPECTATION STATEMENT

Complete this using your synthesis above. This is a thinking tool, not a tagline. Be specific — generic entries here produce generic marketing.

> [Business name] helps people who expect
>
> to actually experience
>
> which is different from what they usually get because

NOTES

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