Beyond "Everyone"

A 30-Minute Audience Worksheet

Understanding your audience helps you decide what to say, where to say it, and what you want your communication to accomplish. This worksheet will help you choose one marketing objective, identify a priority audience, and begin understanding what matters to those people.

Complete it on your own or with your team. Brief notes are fine, and you don't need every answer right now. Use the suggested times to keep moving, and record what you know, what you're assuming, and what you need to learn in the Audience Notes table in Section 6.

Business or organization: _____

Completed by: _____

Date: _____

Before You Begin

Complete this preparation before your 30 minutes start

You'll get more out of this worksheet with a few real examples in front of you. Gather what's easy to find, and use the list below as a guide. Don't let preparation become a project or a reason to postpone getting started.

- ☐ **Your products and services:** Bring a list of your offerings or their main categories. You'll use this to choose an objective in Section 1.
- ☐ **Seasonal patterns:** Note when calls, visits, inquiries, participation, or sales typically pick up or slow down. This will help you consider Season in Section 1.
- ☐ **What people say about you:** Gather a few reviews, testimonials, survey responses, thank-you notes, or complaints. These will help ground the discussion in Section 2.
- ☐ **Why people choose you, or don't:** Bring any useful sales or intake notes, feedback from new customers, or reasons people give for choosing another option. These will also support Section 2.
- ☐ **Questions people ask:** Collect examples from calls, emails, appointments, counter conversations, or other interactions. You'll use these in Section 4 to identify what your audience needs answered.
- ☐ **Your current communications:** Have your website and a few recent emails, ads, social posts, or brochures available. In Section 4, you'll consider how well those materials address your audience's questions.

Who should participate?

If you're completing this with a team, include people who interact directly with your audiences, such as sales, customer service, reception, or program staff. They often hear questions, concerns, and decision reasons that leadership doesn't hear firsthand.

If you're working alone, draw on your own conversations and records. When information is missing, note it as something to investigate rather than trying to fill the gap with a guess.

As you work through the questions

When an answer feels broad or automatic, ask yourself, "What makes me say that?" or "Can I think of a specific example?" Notice whether your answer comes from something you've observed, something someone told you, or an assumption.

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1 Choose Your Marketing Objective

5 MINUTES

WHY THIS MATTERS

Your audience depends on what you want to accomplish. Attracting new customers may involve different people than encouraging repeat purchases, recruiting volunteers, or generating referrals. The same audience can also support different objectives, with different messages or desired outcomes.

A marketing objective describes what you want a particular audience to do or believe about a product or service. "Post more on social media" is an activity; your objective explains what you want that activity to accomplish.

WHAT TO DO

Use TOPPS to think through one objective. Your initial target can be broad because you'll refine it as you work through the worksheet.

ELEMENT	QUESTION TO ANSWER
T: Target	Who do you want to reach?
O: Outcome	What do you want them to do or believe?
P: Product or service	Which product, service, program, or offering is this about?
P: Place, optional	Does a particular location, website, or other way of researching, connecting, or buying matter?
S: Season, optional	Does a particular season, occasion, or timeframe matter?

Target, Outcome, and Product or service are the core elements. Think through Place and Season, then include them if they help clarify your objective.

For example, a landscaping business might want commercial property managers to request consultations for maintenance services before spring. The same business might want existing residential customers to believe it's a convenient choice for year-round property care.

Your starting objective

We want to reach:

We want them to do or believe:

The product, service, program, or offering is:

Place or Season considerations, if relevant:

2 Learn From People You've Already Served

4 MINUTES

WHY THIS MATTERS

People who've already chosen or worked with you can offer clues about who needs what you provide and why it matters. Specific examples also help separate what people have told you from what you believe influenced their decisions.

WHAT TO DO

Think of one or two examples relevant to your objective. These might be customers, clients, donors, volunteers, students, or people who use your services.

What did these people need, and what made them a good fit?

What do you know about why they chose you?

Include what they said or what helped them decide. If someone chose another option, consider what you can learn from that experience, too.

> *If you're new or entering a new market, describe the needs you expect to meet. Record your ideas as assumptions to check.*

3 Choose Your Priority Audience

5 MINUTES

WHY THIS MATTERS

The person who uses or benefits from what you offer may differ from the person who chooses, pays for, approves, or recommends it. Understanding those roles helps you decide whose attention matters most for your selected objective.

WHAT TO DO

Identify the people involved, then choose one group to focus on for the rest of this exercise. One person may fill several roles, and you can skip any that don't apply.

ROLE	WHO FILLS THIS ROLE FOR YOUR OBJECTIVE?
Uses or benefits from the offering	
Chooses or approves	
Pays or controls the budget	
Recommends or influences the decision	

Which group should you focus on first, and why?

What details help you recognize people who are a good fit?

Consider relevant needs, location, responsibilities, budget, or circumstances. For organizations, consider the type of organization and the person's role within it.

Who falls outside this audience for this particular objective?

4 Understand Their Situation and Readiness

9 MINUTES

WHY THIS MATTERS

An age, location, or job title rarely explains someone's whole decision. Understanding their situation, what they already believe, and how close they are to acting helps you give them information that's useful right now.

WHAT TO DO

Answer these questions for the priority audience you chose. Build on your earlier answers, and record uncertainties in the Audience Notes table in Section 6.

What's happening in their lives or work, and what outcome do they want?

Consider practical needs and how people want to feel. Someone seeking a repair may want the problem fixed and reassurance that they're making a sound decision.

What do they already know or believe about the situation or your offering? What might they misunderstand?

Think about the knowledge you take for granted because you work in your field. Consider unfamiliar terms, assumptions about your services, or expectations that could affect someone's decision.

How close are they to acting, and what would help them take an appropriate next step?

They might just be recognizing a need, exploring options, comparing choices, or ready to act. If your audience includes people at different stages, choose one stage to focus on for this exercise.

What questions or concerns need to be addressed at this stage, and how well does your current marketing address them?

Consider cost, timing, uncertainty, competing priorities, and other options. Review whether your website, emails, advertising, or other materials answer their questions or mostly explain what you want them to know.

5 Summarize Your Audience

4 MINUTES

WHY THIS MATTERS

A written definition gives you something specific to use when making marketing decisions. It brings together what you've learned about the people you want to reach and why they might care.

WHAT TO DO

Complete this statement using your earlier answers. Then revisit Section 1 and update your objective if your understanding of the audience has changed.

To support our objective of:

Our priority audience is:

Their relevant needs or circumstances are:

At this stage, they need to understand or feel confident about:

Our offering matters to them because:

We want them to do or believe:

Place or Season considerations, if relevant:

6 Choose Your Next Step

3 MINUTES

WHY THIS MATTERS

Your definition is a starting point, and some of it may still rest on assumptions. Identifying the most important gap gives you a practical way to improve your understanding.

WHAT TO DO

Review your Audience Notes and fill in the most important gaps. What you know should come from something you can point to, such as a conversation, inquiry, observation, or record.

Audience Notes

WHAT WE KNOW AND WHAT SUPPORTS IT	WHAT WE'RE ASSUMING	WHAT WE STILL NEED TO FIND OUT

Where could you reach this audience or learn more about them?

Consider where they research, how they connect with organizations, and whose recommendations they trust.

Choose one question or assumption to investigate next.

How will you investigate it, who will do it, and by when?

Put Your Answers to Work

Use your audience definition when choosing a message, planning content, or deciding where to promote your organization. Ask whether the idea reaches these people, addresses something they care about, and supports what you want them to do or believe.

Update your answers as you learn from conversations, inquiries, and results. When your marketing objective changes, revisit your audience instead of assuming the same people need the same message.

If you'd like help turning these answers into a clearer marketing direction, let's talk. Email me at jen@jenwatson.biz to start a conversation.