EIGHTFOLD SYSTEMS



FREE PLAYBOOK / 04

HOW TO FIND YOUR IDEAL CUSTOMER

Work out exactly which business buyers to go after, and who to talk to at each one.

FOR SERVICE & SOFTWARE COMPANIES

04

LEVEL	TIME	YOU'LL NEED	BUILT FOR
Basic	30 to 45 minutes	A list of your best customers from the last two years	Service and software companies

THE PROBLEM

Every wasted call starts the same way: the wrong person, at the wrong kind of company. Before you write a message, decide who you are going after.

THE RESULT

A ONE-PAGE BUYER PROFILE, A FIRST LIST OF 200 TO 500 BUSINESSES, AND A CLEAR IDEA OF WHO TO CONTACT AT EACH ONE.

THE PLAY

Before you call, email or text anyone, decide who you are going after. Most outbound fails here, not in the message. This playbook takes about 30 minutes to work through.

1. START WITH YOUR BEST JOBS

Write down your 5 best customers from the last two years. "Best" means:

- They paid on time.
- The work was profitable.
- They stayed, or they gave you more work.
- You enjoyed working with them.

Now answer for each one:

QUESTION	CUSTOMER 1	CUSTOMER 2	...
What type of building or business is it?			
How big is it (square feet, sites, employees)?			
Where is it?			
Who hired you (job title)?			
How did they find you?			
What did they need when they called?			

Look for what repeats. That repeat is your starting profile.

2. PICK THE BUYERS, NOT JUST THE INDUSTRY

"Commercial buildings" is too wide. Narrow it with three filters:

1. **Type.** Medical offices, warehouses, schools, apartment complexes, retail centers, restaurants. For software and B2B services: the industry, the kind of product they sell, and the tools they already use.
2. **Size.** The smallest job that is worth your time, and the largest you can handle. For B2B, this is usually employees or revenue.
3. **Place.** The area your crews can cover without losing money on travel.

A good test: can you describe the buyer in one sentence? *"Property managers of medical office buildings over 20,000 sq ft within 60 miles of Dallas."* If you can, you can build a list.

3. FIND WHO ACTUALLY DECIDES

The person who signs is often not the person who feels the problem. Map both.

TYPE OF BUYER	USUALLY DECIDES	OFTEN INFLUENCES
Property-managed buildings	Property manager, regional manager	Building engineer, tenants
Owner-run businesses	Owner or general manager	Office manager
Multi-site companies	Facilities or operations director	Site managers
New construction	General contractor, project manager	Developer, architect
SaaS and B2B companies	Head of the department that feels the problem (sales, marketing, IT, operations)	Founder or CEO at small firms, finance, end users

Start with the decision-maker. If you can't reach them, go to the person who influences them and ask who to talk to.

4. FILL IN YOUR ONE-PAGE BUYER PROFILE

Copy this and fill it in:

- **Who they are:** (type, size, location)
- **Job title we call:**
- **The problem they have:** (in their words, not yours)
- **What makes them switch vendors:** (price, missed visits, a bad review, a new building, a contract ending)
- **When they buy:** (season, budget cycle, lease dates)
- **What they worry about:** (reliability, insurance, safety, cost)
- **Why they would choose us:**

5. FIND THEM

Places commercial buyers show up:

- Business and property listings in your county
- Commercial real estate listings and property manager directories

- Local permit and licensing records
- Chamber of commerce and trade association member lists
- LinkedIn searches by job title and area
- Your own past quotes that never turned into jobs
- For B2B: company databases, funding and hiring news, and software review sites

Look for a reason to call now. The best buyers on your list are the ones with something changing: a new tenant, a sale, a new property manager, a building permit, an expiring contract. Mark them. They go to the top.

Aim for a first list of 200 to 500 businesses, not thousands.

6. TEST BEFORE YOU SCALE

Take 100 names from your list. Reach out for two weeks. Track:

- How many you reached
- How many replied
- How many wanted a meeting
- How many became real quotes

If reply rates are low, the problem is usually the **list** or the **message**, not the market. Change one thing at a time and test again with a fresh 100.

CHECKLIST

- ☐ My 5 best customers are written down
- ☐ I can describe my buyer in one sentence
- ☐ I know the job title to contact
- ☐ My one-page profile is filled in
- ☐ I have a first list of 200+ names
- ☐ I've tested with 100 before scaling

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