dijital team

The MSP
ICP Builder
& Customer Profitability Assessment

Find your best customers. Improve your margins.
Build a more profitable MSP.

10	7	100	90
exercises	scoring criteria	point ICP score	day plan

dijitalteam.com



How to use this workbook

For MSP owners and leaders who want to define their Ideal Customer Profile (ICP) and win more of the right customers.

Four steps

1. **Gather your numbers first:** recurring revenue, direct delivery costs, tickets and engineering hours for each customer, over the last three to six months.
2. **Work as a leadership team.** Bring in sales, finance, service delivery and customer success.
3. **Allow 60-90 minutes** for the first pass. Estimates are fine; replace them as your reporting improves.
4. **Let the sums do themselves.** Adobe Acrobat and Reader work out margins, scores and totals. In other viewers, add them up yourself.

Your details

Company

Completed by

Date

Next ICP review

By the end you will be able to

- ✓ Find the customers that create the most value
- ✓ See how customer traits drive your margins
- ✓ Define your ideal industries, sizes and technology
- ✓ Score every prospect the same way, out of 100
- ✓ Spot underperforming and poor-fit customers
- ✓ Focus sales and marketing on better-fit customers
- ✓ Plan 90 days of improvements

If everyone is your prospect, then nobody is your customer.

Back to the workbook on one page

The workbook on one page

Three sections and 10 exercises. Select a section or an exercise to go straight to it.

	1 Know your customers Pages 4 to 10	2 Define your ICP Pages 11 to 16	3 Put it to work Pages 17 to 23
What you do	Measure customer gross margin, profile your best and worst customers and place each one in the matrix.	Describe your ideal customer, score prospects out of 100 and write your ICP statement.	Align sales and marketing, size the margin opportunity, plan 90 days and track the results.
Exercises	1 2 3 4	5 6 7	8 9 10
What you'll have	✓ Gross margin for 10 customers ✓ What your best customers share ✓ Five non-negotiables ✓ Every customer in a category	✓ A completed ICP builder ✓ A prospect score out of 100 ✓ An ICP statement anyone can repeat	✓ Target accounts, buyers and signals ✓ A profitability improvement plan ✓ A 90-day action plan ✓ An ICP performance scorecard ✓ A one-page ICP summary
Start here	Page 4 ›	Page 11 ›	Page 17 ›

Need more ideal-fit meetings? Dijital Team provides dedicated Sales Development Representatives for MSPs. **Book a conversation**

1. Know your customers:
Find out which customers make you money

At the end of this section you will have the gross margin of at least 10 customers, the traits your best customers share, the warning signs of a poor fit and every customer in one of four categories.

Start with the customers you already have, not the ones you'd like to win.

In this section

1 **Identify your most profitable customers**
Exercise 1, pages 5 and 6

2 **Look beyond the financials**
Exercise 2, page 7

3 **Understand what you want to avoid**
Exercise 3, page 8

4 **Segment your existing customers**
Exercise 4, pages 9 and 10

Back to the workbook on one page

Identify your most profitable customers

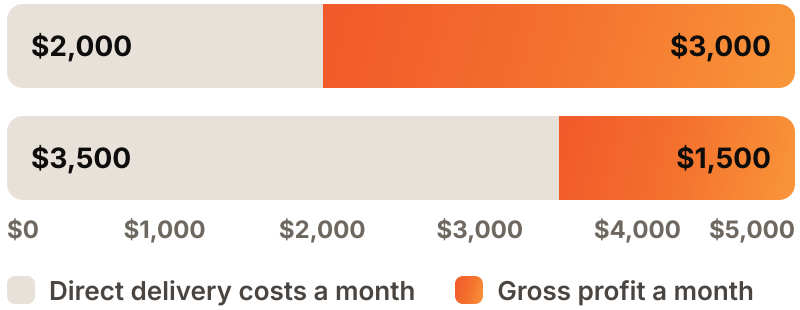
Exercise 1. Not all revenue is good revenue. What matters is the value left after you've delivered the service.

Collect eight metrics for every customer

Monthly recurring revenue	Average recurring services revenue a month
Direct delivery costs	Labour, tools and other directly attributable costs
Gross profit	MRR minus direct delivery costs
Gross margin	Gross profit as a percentage of MRR
Tickets per user	Average monthly tickets per supported user
Support labour	Engineering hours used each month
Tenure	How long they have been a customer
Revenue growth	Expansion or contraction of recurring revenue

Use the same three to six months for every customer, and assess one-off project revenue separately.

Example: two customers, the same revenue



$36,000
Customer A, gross profit a year

$18,000
Customer B, gross profit a year

Same revenue, twice the gross profit. Across 20 similar customers, that's $360,000 a year.

Illustrative example, assuming revenue and costs stay constant.

Back to Know your customers

Your customer profitability worksheet

Worksheet: fill in on screen or print

Exercise 1, continued. List at least 10 customers, with your highest-margin, lowest-margin and largest accounts. No cost data yet? Estimate it from support hours, loaded labour rates and attributable licensing, and tick Estimate.

#	Customer	MRR	Direct cost	Gross profit	Margin	Estimate
1		$	$	$	%	☐
2		$	$	$	%	☐
3		$	$	$	%	☐
4		$	$	$	%	☐
5		$	$	$	%	☐
6		$	$	$	%	☐
7		$	$	$	%	☐
8		$	$	$	%	☐
9		$	$	$	%	☐
10		$	$	$	%	☐
	Total	$	$	$	%	

Highest gross profit

1 _____

2 _____

3 _____

Lowest gross margin

1 _____

2 _____

3 _____

What surprised you about these results?

Are your highest-revenue customers also your most profitable? Why or why not?

In Acrobat and Reader, both lists fill in from your table.

Back to Know your customers

Look beyond the financials

Worksheet: fill in on screen or print

Exercise 2. Choose your five strongest customers on profit, operational fit and relationship quality, and describe each one.

	Customer 1	Customer 2	Customer 3	Customer 4	Customer 5
Industry What industry are they in?					
Users and employees How many?					
Locations How many sites?					
Technology stack Platforms and applications					
Standardisation How close to your stack?					
Security maturity Do they invest in controls?					
Gross margin From your worksheet					
Support complexity Is the workload manageable?					
Relationship quality Do they value your advice?					
Growth potential Is there room to expand?					

Look for shared patterns

For example, your most profitable customers might:

- ✓ Work in professional services
- ✓ Have 50-150 supported users
- ✓ Use Microsoft 365 and standard endpoints
- ✓ Invest properly in cybersecurity
- ✓ Value proactive advice and IT planning
- ✓ Have predictable support needs
- ✓ Engage well in quarterly reviews

Illustrative example.

Your five most important findings

1 _____

2 _____

3 _____

4 _____

5 _____

Back to Know your customers

Understand what you want to avoid

Worksheet: fill in on screen or print

Exercise 3. Rate how often each trait causes problems today. The aim is to stop acquiring more customers like them.

#	Poor-fit trait	Low impact	Moderate impact	High impact
1	Unsupported legacy technology	○	○	○
2	Resistance to security improvements	○	○	○
3	Excessive support requirements	○	○	○
4	Poor technology standardisation	○	○	○
5	Unrealistic service expectations	○	○	○
6	Low recurring revenue potential	○	○	○
7	Constant pricing disputes	○	○	○
8	Poor communication or engagement	○	○	○
9	Requirements outside our core capabilities	○	○	○
10	Unpredictable project demands	○	○	○

Define your non-negotiables

The minimum commercial, technical and operational requirements every new customer must meet. For example:

- Minimum monthly contract value
- Mandatory security baseline
- Supported technology standards
- Clear inclusions and exclusions
- Reasonable customer responsibilities
- Willingness to remediate
- Acceptable payment terms

Our five customer non-negotiables

1 _____

2 _____

3 _____

4 _____

5 _____

Every prospect is checked against these on page 15. Many difficult accounts can still be repriced, standardised or rescoped.

Back to Know your customers

The customer profitability and strategic fit matrix

Exercise 4. Not every customer needs the same strategy. Compare profitability with strategic fit to see where to invest, improve or rethink a relationship.

	High strategic fit	Low strategic fit
High profitability	**1 Ideal customers** **Retain, grow and find more like them** ✓ Strengthen the relationship ✓ Add services that create real value ✓ Build success stories; ask for introductions ✓ Use their traits to refine your ICP	**2 Financially attractive but complex** Manage carefully and assess scalability ✓ Review delivery risk and reliance on key engineers ✓ Reduce complexity where you can ✓ Ask whether similar customers would scale ✓ Don't make a profitable exception a target market
Low profitability	**3 Improvement opportunities** Review pricing, scope and efficiency ✓ Review pricing and service scope ✓ Analyse ticket and labour consumption ✓ Standardise tools; automate repetitive work ✓ Agree a plan with clear commercial outcomes	**4 Poor-fit customers** Reprice, standardise, change scope or consider an orderly exit ✓ Run a commercial and operational review ✓ Test whether pricing or scope changes fix it ✓ Set minimum acceptable service standards ✓ Plan a managed transition if it isn't viable

Back to Know your customers

Place every customer in the matrix

Worksheet: fill in on screen or print

Exercise 4, continued. Names and margins carry over from page 6. Choose high or low for each, and the category fills in.

#	Customer	Margin	Profitability	Strategic fit	Category	Priority action
1		%	High / Low	High / Low		
2		%	High / Low	High / Low		
3		%	High / Low	High / Low		
4		%	High / Low	High / Low		
5		%	High / Low	High / Low		
6		%	High / Low	High / Low		
7		%	High / Low	High / Low		
8		%	High / Low	High / Low		
9		%	High / Low	High / Low		
10		%	High / Low	High / Low		

Recurring revenue from ideal customers

%

From poor-fit customers

%

Three accounts with the biggest profitability opportunity

1 _____ 2 _____ 3 _____

Back to Know your customers

2. Define your ICP:
Describe, score and state the customers you want more of

At the end of this section you will have an ICP written across five areas, a 100-point scorecard your team can use on every prospect and an ICP statement anyone in your business can repeat.

Ground it in real customer performance, your technical capabilities and the outcomes you deliver best.

In this section

5 **Build your ICP**
Exercise 5, pages 12 and 13

6 **Score prospects out of 100**
Exercise 6, pages 14 and 15

7 **Write your ICP statement**
Exercise 7, page 16

Back to the workbook on one page

Build your ICP: who they are

Worksheet: fill in on screen or print

Exercise 5. Describe the organisations most likely to be profitable to serve, aligned with your capabilities and valuable over the long term.

A Business characteristics

Primary target industries

Secondary target industries

Ideal number of employees or users

Minimum ____ Maximum ____

Ideal number of business locations

Target geographic markets

Typical business characteristics

B Technology environment

Preferred technology platforms

Applications or systems we specialise in

Minimum cybersecurity requirements

Standardisation requirements

Technology environments we prefer not to support

An ideal customer doesn't need a perfect technology environment. They need to recognise the value of getting it right.

C Commercial characteristics

Minimum acceptable monthly recurring revenue

$ ____

Target monthly recurring revenue range

$ ____ to $ ____

Target recurring gross margin

____ %

Maximum acceptable cost to serve

Typical contract requirements

Expected growth and expansion potential

Back to Define your ICP

Build your ICP: why they buy

Worksheet: fill in on screen or print

Exercise 5, continued. Name the problems you solve best and how your ideal customers make buying decisions.

D Business challenges

The three biggest business problems we solve

1

2

3

The business outcomes our customers value most

What makes us uniquely qualified to deliver them

E Buying characteristics

Typical decision-makers

Other stakeholders in the purchase

Common buying triggers

Signs of an ideal long-term relationship

Behaviours or requirements that signal a poor fit

Signs of a good fit

- ✓ Sees technology as a business enabler
- ✓ Takes security and resilience seriously
- ✓ Is open to proactive advice
- ✓ Has clear decision-making roles
- ✓ Values recurring managed services
- ✓ Will invest in standardisation
- ✓ Wants a long-term partner

Warning signs

- ✗ Buys on the lowest price alone
- ✗ Resists essential security controls
- ✗ Has unrealistic support expectations
- ✗ Won't address unsupported technology
- ✗ Communicates poorly or decides unclearly
- ✗ Expects work outside the contract

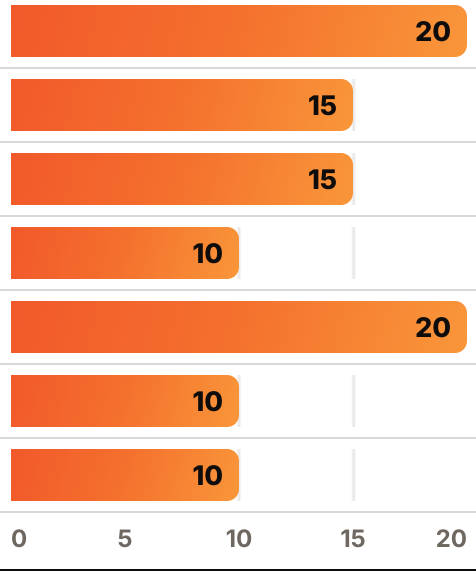
Warning signs don't rule a prospect out, but they should shape how you qualify, price and structure the deal.

Back to Define your ICP

The 100-point ICP scoring model

Exercise 6. Seven weighted criteria, so your SDRs, sales team and leadership judge every prospect the same way.

Criterion	Points available	Prospect A	Prospect B
1 Industry alignment	20	20	10
2 Business size and MRR potential	15	15	15
3 Technology and service model fit	15	15	5
4 Cybersecurity and standardisation alignment	10	10	3
5 Commercial potential and expected margin	20	20	10
6 Business challenges and strategic needs	10	10	7
7 Buying behaviour and cultural fit	10	10	3
	0 5 10 15 20		
Total	**100**	**100**	**53**



How to score

1. Score each criterion on evidence, using the levels on page 15.
2. Mark it unknown until you have evidence. Don't award or deduct points on guesses.
3. Apply your non-negotiables separately: a prospect scoring 85 shouldn't proceed if it fails one.
4. ICP fit tells you who to pursue; buying intent tells you when to engage.

Prospects A and B are an illustrative example: B needs more investigation before you commit time to it.

What the score means

Starting points, not industry benchmarks. Calibrate them with your own customer performance.

80-100 **Ideal-fit prospect**
Prioritise for strategic outreach

60-79 **Strong potential fit**
Qualify and investigate

40-59 **Possible fit**
Selective engagement or nurturing

Below 40 **Low fit**
Generally deprioritise

Back to Define your ICP

Score a prospect out of 100

Worksheet: fill in on screen or print

Exercise 6, continued. Pick one level per criterion, or ? until you have evidence. Use a fresh copy for each prospect.

Prospect _____ **Scored by** _____ **Date** _____

1	**Industry alignment**	20	Our primary target industry	15	A strongly aligned secondary industry	10	Serviceable, but not targeted	5	Little relevant expertise	0	Outside our market or capabilities	?	Unknown
2	**Business size and MRR potential**	15	Fits our ideal size and MRR	10	Slightly outside our range, still attractive	5	A big mismatch in size or contract value	0	Below our minimum requirements	?	Unknown		
3	**Technology and service model fit**	15	Strong fit with our stack and capabilities	10	Minor gaps that onboarding can fix	5	Major remediation or specialist support	0	Outside our capabilities or support model	?	Unknown		
4	**Cybersecurity and standardisation alignment**	10	Meets or commits to our standards	7	Minor gaps, credible remediation plan	3	Significant gaps to qualify further	0	Unwilling to meet mandatory standards	?	Unknown		
5	**Commercial potential and expected margin**	20	Strong MRR at or above target margin	15	Attractive MRR, manageable cost to serve	10	Viable, below preferred margin or size	5	Material pricing or cost-to-serve concerns	0	Terms incompatible with our model	?	Unknown
6	**Business challenges and strategic needs**	10	Clear, high-value needs in our expertise	7	Relevant needs, credible future opportunity	3	Little evidence of a need we can meet	0	No fit with our value proposition	?	Unknown		
7	**Buying behaviour and cultural fit**	10	Values expertise, partnership and outcomes	7	Generally aligned with how we work	3	Concerns about expectations or decisions	0	Conflicts with our operating model	?	Unknown		

Meets all our non-negotiables? ◯ Yes ◯ No

ICP score _____ **out of 100**

Classification _____

Next step _____

Back to Define your ICP

Write your ICP statement

Worksheet: fill in on screen or print

Exercise 7. Make it easy for everyone, from SDRs and marketing to service delivery and customer success, to describe the customer you want to win.

Use this template

Our ideal customers are **[industry or business type]** with **[employee or user range]**, operating in **[geographic market]**. They typically use **[preferred technology platforms]** and face challenges relating to **[primary business problems]**. They value **[business outcomes]**, are willing to invest in **[security and technology standards]** and want a long-term technology partner. Our ideal engagement generates **[target MRR range]** at a recurring gross margin of **[target margin]** or more. We are well positioned to serve them because **[your differentiation, expertise or capabilities]**.

Our ICP statement

Example, illustrative only

"Our ideal customers are accounting and professional services firms with 75-200 employees across Brisbane and South East Queensland.

They mainly use Microsoft 365 and modern cloud technologies, and value proactive advice, cybersecurity, standardisation and reliability.

Our ideal engagements generate $5,000-$15,000 in monthly recurring revenue at margins that meet our targets.

We differentiate through our understanding of professional services, standardised delivery and strategic IT guidance."

Back to Define your ICP

3. Put it to work:
Turn your ICP into pipeline, margin and a 90-day plan

At the end of this section you will have a target account plan, a value proposition, an improvement plan for existing customers, a 90-day action plan, an ICP performance scorecard and a one-page ICP summary.

An ICP only pays off when it changes who you sell to, how you price and where your people spend their time.

In this section

8 **Align sales and marketing**
Exercise 8, page 18

9 **Improve your existing customers**
Exercise 9, pages 19 and 20

10 **Your 90-day ICP action plan**
Exercise 10, page 21

✓ **The ICP performance scorecard**
Page 22

✓ **Your final ICP summary**
Page 23

Back to the workbook on one page

Align sales and marketing with your ICP

Worksheet: fill in on screen or print

Exercise 8. Your ICP describes the organisation; buyer personas describe the people who decide.

A Build your target account list

Start with 100-200 organisations that match your ICP, or fewer in a specialised market. Rank them by fit and buying signals.

LinkedIn Sales Navigator | Apollo | Industry associations | Customer referrals | CRM data | Business news | Leadfeeder

Target accounts to start with

Owner of account research

Primary target industry

Primary geographic market

C Define your value proposition

We help **[ideal customer]** achieve **[business outcome]** by **[what you do differently]**, without **[common frustration or obstacle]**.

B Know your buyer personas

Persona and what they care about	What to say
CEO or Managing Director Growth, business risk, profitability	IT that supports predictable business performance
CFO Cost control, ROI, commercial risk	More predictable technology spend and lower risk
COO Operational reliability, productivity	Less disruption and more efficient operations
IT Manager Technical capability, security, support	Specialist expertise and scalable service delivery

Our primary decision-maker

Our secondary decision-makers

D Watch for buying signals

- [ ] Business expansion or new locations
- [ ] Acquisition or merger
- [ ] Significant employee growth
- [ ] New leadership appointments
- [ ] Increased cybersecurity requirements
- [ ] Compliance or regulatory changes
- [ ] Cloud transformation projects
- [ ] Internal IT recruitment
- [ ] Upcoming IT contract review
- [ ] Relevant industry developments

Signals guide research and priority. They don't prove a company needs a new IT provider.

Back to Put it to work

Improve the customers you already have

Worksheet: fill in on screen or print

Exercise 9. Start with customers that fit strategically but earn poor margins. What would need to change?

Pricing and packaging
Does pricing reflect the true cost to deliver and the value you provide?

Technology standardisation
Align customers with your preferred stack to cut complexity.

Automation
Automate recurring tickets and manual tasks.

Service scope
Clarify inclusions, exclusions, responsibilities and out-of-scope work.

Customer maturity
Help customers improve security, technology planning and operating practices.

Support efficiency
Analyse recurring incidents, escalation rates and engineering hours.

	Customer	Current issue	Required action	Owner	Target date
1					
2					
3					
4					
5					

Back to Put it to work

Size the profitability opportunity

Worksheet: fill in on screen or print

Exercise 9, continued. Gross profit is MRR minus direct delivery costs. Enter today's figures and your targets.

		Today			Your target			
	Customer	MRR	Direct costs	Gross profit	MRR	Direct costs	Gross profit	Improvement a month
1		$	$	$	$	$	$	$
2		$	$	$	$	$	$	$
3		$	$	$	$	$	$	$
4		$	$	$	$	$	$	$
5		$	$	$	$	$	$	$

Your profitability improvement opportunity

Customers sized	Gross profit today	Target gross profit	Improvement a month	Improvement a year
	$	$	$	$

Monthly figures, for the customers you have sized.

Example, illustrative only

A customer on $5,000 MRR with $3,500 of direct costs earns $1,500 a month (30%). Standardisation, automation and repricing target $5,500 MRR and $2,750 of costs: $2,750 a month (50%).

That's $1,250 more a month, or $15,000 a year. Across 10 similar accounts: $150,000 a year.

Only if achieved and sustained, without cutting contracted service quality or required security controls.

Back to Put it to work

Your 90-day ICP action plan

Worksheet: fill in on screen or print

Exercise 10. Turn the workbook into changes in how you attract, qualify, serve and keep customers. Tick each action off as it's done.

30 Days 1 to 30 — Understand and define

A clear picture of your customers and their profitability.

- [ ] Complete customer-level profitability analysis
- [ ] Identify your 10 most profitable customers
- [ ] Identify your 10 least profitable customers
- [ ] Analyse what your best accounts share
- [ ] Find the common causes of poor profitability
- [ ] Define ideal industries, sizes and technology
- [ ] Agree commercial and technical standards
- [ ] Complete and approve your ICP statement

Accountable leader _____ Target date _____

Key decision required _____

60 Days 31 to 60 — Align sales and operations

The ICP built into everyday business processes.

- [ ] Introduce ICP scoring into your CRM
- [ ] Train SDRs, BDRs and BDMs on ICP qualification
- [ ] Build a prioritised target account list
- [ ] Update core sales and marketing messaging
- [ ] Review pricing and scope of weak accounts
- [ ] Develop customer profitability improvement plans
- [ ] Align service delivery standards with the ICP
- [ ] Add an approval step for out-of-ICP deals

Accountable leader _____ Target date _____

Key decision required _____

90 Days 61 to 90 — Execute and optimise

Better acquisition quality and stronger margins.

- [ ] Launch ICP-focused outbound campaigns
- [ ] Develop industry-specific marketing content
- [ ] Review qualification and opportunity conversion
- [ ] Implement priority profitability improvements
- [ ] Measure customer-level gross margin changes
- [ ] Review pipeline quality and expected margins
- [ ] Find more ways to standardise service delivery
- [ ] Start a recurring quarterly ICP review

Accountable leader _____ Target date _____

Key decision required _____

Back to Put it to work

The ICP performance scorecard

Worksheet: fill in on screen or print

Your ICP should evolve with your results. Track these measures and review them with your leadership team every month.

#	Measure	Current	90-day target	Actual
1	Pipeline aligned with your ICP (%)			
2	New customers that meet your ICP (%)			
3	Average new customer MRR			
4	Average new customer gross margin			
5	Lead-to-opportunity conversion			
6	Opportunity win rate			
7	Average support tickets per user			
8	Recurring revenue from ideal-fit customers (%)			
9	Monthly gross profit improvement			
10	Customer churn rate			

Monthly leadership review

1. Are we attracting more prospects that fit our ICP?
2. Are higher-fit opportunities converting better?
3. Are new customers meeting our margin targets?
4. Are we reducing complexity in our customer base?
5. Are our improvement plans delivering results?
6. Do we need to refine any part of our ICP?
7. What are our three most important next actions?

Key decisions

Next actions and owners

Back to Put it to work

Your final ICP summary

Worksheet: fill in on screen or print

Bring your answers together on one page and share it with your leadership team.

Our ideal customer

Primary target industries

Ideal customer size

Target geography

Preferred technology environment

Business challenges we solve

Target monthly recurring revenue

Target gross margin

Minimum customer requirements

Primary decision-makers

Our competitive differentiation

Our three biggest opportunities

1. **Improve customer acquisition**
2. **Improve existing customer profitability**
3. **Reduce service delivery complexity**

Our 90-day commitments

	Commitment	Owner	Due	Success measure
1				
2				
3				

Leadership review date

Approved by

Back to Put it to work

Better customers build better MSPs

The goal isn't to be the right MSP for every customer. It's to become the obvious choice for the customers you're best positioned to serve.

How Dijital Team can help

Sales Development Representatives	Research target accounts, run outbound campaigns and book qualified meetings with ideal-fit prospects.	The SDR role ›
Marketing Specialists	Turn your ICP into industry-specific content, campaigns and lead generation.	The Marketing Specialist role ›
Better Business Pathway	Helps MSP leaders build stronger margins, sustainable growth and predictable performance.	About the pathway ›

Your next 90 days start here

- [ ] **ICP statement approved**
- [ ] **Scoring in your CRM**
- [ ] **Target list built**
- [ ] **First review booked**



Talk to us about your results, your ideal customers and the capacity you need to win more of them. **Book a conversation**

This workbook is for education and planning. All financial examples, scoring thresholds and targets are illustrative; validate them with your own customer, operational and financial data.