

Customer Acquisition Planning Worksheet

Use this worksheet to create a practical plan for finding and acquiring your first customers. Start with the customers you most want to reach, identify where they can be found, and decide how you will test your acquisition approach.

Your first plan does not need to be perfect. The goal is to choose a focused starting point, measure what happens, and improve your approach based on what you learn.

1. Your Target Customer

Who is your primary customer?

What problem are they trying to solve?

Why is this problem important to them?

What would motivate them to consider your solution?

2. Your Customer Offer

What product or service are you offering?

What is the main benefit to the customer?

What does the customer need to do to get started?

What is your current price?

3. Where Will You Find Customers

Identify the places where your target customers already spend time, search for information, or make purchasing decisions.

[] Search engines

- ☐ Social media
- ☐ Online communities
- ☐ Email
- ☐ Referrals
- ☐ Partnerships
- ☐ Events or networking
- ☐ Direct outreach
- ☐ Paid advertising
- ☐ Other: _____

Which one or two channels will you test first?

Why did you choose these channels?

4. Your Acquisition Approach

How will you reach potential customers?

What will you say or offer to get their attention?

What action do you want the customer to take?

What will happen after they take that action?

5. Your First Customer Goal

How many new customers do you want to acquire during your initial test?

What time period will you use for the test?

What will success look like?

6. Acquisition Costs

Estimate what you expect to spend acquiring customers.

Advertising:

Software or tools:

Sales or marketing services:

Other acquisition costs:

Estimated total acquisition spending:

Expected number of new customers:

Estimated Customer Acquisition Cost:

Use the ThinksmithOS Customer Acquisition Cost Calculator to calculate your CAC once you have actual spending and customer data.

7. Customer Value

Think about the potential long-term value of the customers you acquire.

Average customer purchase:

Estimated number of purchases per customer:

Estimated Customer Lifetime Value:

How could you increase customer retention or repeat purchases?

8. Test & Measure

Track what happens during your customer acquisition test.

Number of people reached:

Number of responses or leads:

Number of customers acquired:

Total acquisition spending:

Actual Customer Acquisition Cost:

What worked?

What did not work?

What surprised you?

9. Improve Your Approach

Based on what you learned:

What should you continue doing?

What should you stop doing?

What should you change or test next?

10. Your Next Customer Goal

How many customers do you want to acquire next?

Which acquisition channel will you focus on?

What is the most important thing you need to improve?

When will you review your results?

Final Checklist.

- ☐ I have clearly defined my target customer.
- ☐ I understand the problem I am solving for them.
- ☐ I have identified one or two customer acquisition channels to test.
- ☐ I have a clear offer and call to action.
- ☐ I have established an initial customer acquisition goal.
- ☐ I know what I expect to spend acquiring customers.
- ☐ I understand how to calculate my Customer Acquisition Cost.
- ☐ I have considered the potential lifetime value of my customers.
- ☐ I have a way to track leads and customers.
- ☐ I know what I will measure during my first acquisition test.
- ☐ I have identified what I will change based on the results.

. What to Do Next

Customer acquisition becomes easier to improve when you treat it as a process rather than a one-time marketing activity.

Start with a focused customer group, test one or two channels, track your results, and use what you learn to improve the next test.

Your first goal isn't to build a perfect marketing machine. It's to discover a repeatable way to reach people who need what your business offers.