TAILWIND FIELD GUIDES

Choose the right prospects.

Four steps to turn your ideal customer profile into a list worth working.

4 steps | 7 minute read Includes a practical worksheet

Michael Wills has spent more than a decade helping small-business owners build sales organizations. Glenn Nixon spent 29 years in corporate sales and sales leadership before advising small businesses. Their experience speaks to a familiar problem: you have a list of names, but you're still figuring out who belongs on it. Pursuing the wrong fit can cost you time and eat into the margin you needed from the sale.

In this guide, we draw on our interviews with these two sales pros to show you how to turn your ideal customer profile into a list worth working. Four practical steps take you from the problem you solve to the people you should approach and the questions you need to ask.

Read on, then put their advice to work with the accompanying worksheet. You'll define a good fit, set useful boundaries, choose the next move for each prospect, and improve the list as you learn.

01 Find the shared problem
02 Set the boundaries
03 Choose the next move
04 Learn from the conversations

01 Start with why customers needed you.

An ideal customer profile describes the companies you can help and serve well. Industry, size, and location narrow the search. Michael adds the problem you solve, why your approach fits, and what makes the timing right. Start with his question:

> “who are we uniquely built to help?”
>
> **Michael Wills**
> President and Founder, Top Line Solutions

Go back to good customers. Read the early emails and call notes. What was happening before they bought? What did they need help with? Look for a problem that repeats.

For example, as a founding AE, ask the founder to walk through three good customers with you. Get the reasons behind the wins onto the page.

No customers yet? Start with your earliest customer conversations and mark what still needs checking.

Watch Michael find the pattern in good customers ↗

Michael explains which emails, conversations, and customer problems to revisit before building the next prospect list.

From Topsail’s interview with Michael Wills
49 seconds · Opens on YouTube at 16:23; watch to 17:12.

Write a useful starting point

- Start with up to three customers you serve well. Note their original problem and why they chose you.
- Finish this sentence: We help [customer] solve [problem] because [why our approach fits].

You’re ready when: You can explain the fit without listing product features.

That gives the prep a direction. **With Topsail ONE, we prepare contacts around your customer criteria.** You define the market; we handle sourcing, qualification, research, and verification.

02 Know what would make it a no.

Glenn uses a service business with pricing built around a one-hour drive. A prospect is an hour and twenty minutes away. Close enough? Only if someone deals with the extra cost. Otherwise, the sale can look good while the margin gets worse.

A boundary needs a reason. Geography, delivery requirements, and price matter when they affect whether you can do the job well. Glenn puts it plainly:

> “sometimes it’s just as important or more important to know when to say no.”
>
> **Glenn Nixon**
> Founder, Self-Managing Sales Organizations

Fits the boundaries

You have a reason to approach. Use the conversation to check the need.

A key fact is missing

Make the unanswered question your next move. Don’t fill the gap with a guess.

Fails a firm requirement

Take it off the active list. Resolve any exception before pursuing it.

Watch Glenn put a cost on “close enough” ↗

An extra twenty minutes sounds harmless. Glenn’s service-business example shows how an exception starts changing the economics.

From Topsail’s interview with Glenn Nixon

1 minute 20 seconds · Opens on YouTube at 3:53; watch to 5:13.

Make the limits usable

- Write your firm requirements and the business reason behind each.
- Name who can approve an exception and what they need to check.

You’re ready when: You can explain both who belongs and who doesn’t.

03 Separate what you know from what you need to ask.

Michael looks for problems like those his clients solve. A company's fit doesn't confirm its need. Find who owns the problem; if you don't know, make that your first question.

WORKED EXAMPLE

Three prospects. Three next moves.

Illustration: an IT service supports offices with 10–50 staff within a one-hour drive. It handles employee IT problems, but not specialist compliance.

Acorn · approach

24 staff; 40 minutes away; opening another office. The expansion is known; IT pressure is unconfirmed. Ask who is arranging support for the new site.

Birch · remove

120 staff; two hours away; needs specialist compliance. It fails the requirements. Remove it.

Cedar · check

25 minutes away; staff count unknown. Check whether the office fits the 10–50 range before treating it as a fit.

Acorn gets an opening question. Birch comes off. Cedar needs a fit fact checked.

Fictional companies and criteria applying both guests' advice. These are not customer results.

Watch Michael add timing to the target ↗

Michael keeps size and industry in the picture, then adds problems and events that could make a conversation timely.

From Topsail's interview with Michael Wills

1 minute 22 seconds · Opens on YouTube at 19:27; watch to 20:49.

Check your next five prospects

- Use the worksheet for one company: record a fact and source, an open question, the buying role, and the next move. Repeat for the next four.

You're ready when: Each prospect has a fit decision and a specific action.

04 Improve the target without quietly widening it.

Glenn wants sellers involved in improving the fit questions. They're the ones hearing where the criteria are fuzzy. Michael also brings sales conversations back to leadership so the strategy stays connected to the market.

A founder selling alone can review the same evidence. Which needs keep coming up? Which requirements keep failing? Change a criterion for a reason you can explain. A tempting deal shouldn't quietly redraw the whole market.

Watch Glenn bring sellers into the adjustment ↗

Glenn explains why unclear criteria need another conversation, with the seller helping to improve them.

From Topsail's interview with Glenn Nixon

34 seconds · Opens on YouTube at 21:48; watch to 22:22.

Review what the list taught you

- Each week, bring one confirmed fit, one mismatch, and one unanswered question to a review.
- Decide what to keep or change. Record the evidence, owner, and date; use those criteria for the next list.

You're ready when: The next list reflects what you learned.

Is this list worth working?

Check before you add more names.

Before you start
☐ I can name the problem we solve.
☐ I know the requirements and their reasons.
☐ Each prospect has a fit decision and a specific next move.
☐ The next review is on the calendar.

Download the worksheet ↓

One-page, fillable PDF · No email required

Clear criteria still need prepared contacts. **Topsail ONE handles that prep and organizes the daily work.** You bring the market knowledge and have the conversations that make it better.

THE CONVERSATIONS BEHIND THE GUIDE

Keep listening with Tailwind.

Tailwind brings the conversations and expertise. Field Guides turn those insights into practical resources you can use.

Michael Wills

Build the Sales Infrastructure to Move Beyond Founder-Led Selling

Glenn Nixon

Keep Near-Fit Deals from Pulling You Off Target