



Guide to Customer Personas

Your customer is more than data points. Define your ideal client as a real person!

Beginner's Guide to Customer Personas

Everyone has an ideal customer; that individual or group of individuals who are most likely to buy a product or service. Defining an ideal customer doesn't mean you don't sell to other people, but the definition allows you to focus your product designs and marketing messages on these most attractive customers.

The more you know about your ideal customers, the easier it is to speak their language, defining what you do in terms that match up with their most pressing issues. When you do that, they are more likely to respond positively to you, your product and your company.

One of the best strategies to help you zero in on your ideal client is to build personas. This workbook will show you how

What's Inside

What are Personas?

Buyer personas are a general description of your ideal customer. Instead of simply listing the characteristics you create a fictional person, give them a name, and photo, hobbies, interests and concerns. These traits make your persona come alive. The more well defined and real your persona is, the easier it is for your marketing team to create ads, select social media platforms, and write blog posts and newsletters which really hit home with prospective customers.

These personas shouldn't be random guesses. Instead they should be built on research and conversations with real customers.

How many personas?

Your business might have more than one persona. Just remember if personas are really different, you will need to create custom messages and marketing directed at each one. That can become very complex and overwhelming for most companies.

Our suggestion, start small, with 2 or 3 relevant personas. If you find yourself frequently trying to blend two messages, split the persona. If you can't figure out different messages, you may need to combine some of your personas.

What does a Persona Include?

There are four main sections to a Persona: The Who, The What, The Why, and The How. Using data from surveys and your interactions with real customers divide your market into segments and build a persona for each segment. It may take awhile to answer all the questions.

Don't rush the process, it is important to get it right because you will use this profile throughout your marketing.

The Who

This first section defines the identifiable characteristics. This can include:

- **Background** - Job, Career Path, Education
- **Demographics** - Gender, Age, Income, Location, Family
- **Identifiers** - Personality, Communication Preferences

When you are done writing this first section give your persona a name and select a stock image to help everyone visualize your persona as a real person.

The What

Now that you have a person in mind it is time to think about what is important to them.

- **Goals** - What are they trying to achieve professionally
- **Challenges** - What are the obstacles standing in their way
- **What can we do?** - How does your product or service help your person achieve goals and overcome challenges?

The Why

Now it is time to get inside the head of your ideal client.

- **Real Quotes** - Bring the person to life by including quotes from surveys and conversations
- **Common Objections** - Unless you are an extraordinarily good sales person, you have heard lots of reasons why someone won't buy your product. Collect some of the most common ones. This will be useful as you look to craft relevant messages.

The How

Once you have defined your customer, understand their challenges, likely objections and how you solve their problems, it is time to create unique marketing messages for each persona which speak to their concerns, objectives and fears.

- **Position Statement** – This statement sums up your competitive advantage by summarizing who your customer is, what they want and how you help them. This is often just an internal message, and not advertising copy.
- **Marketing Message** -In one sentence, describe the key benefit of your solution. Often this becomes your tagline.
- **Elevator Pitch**- This is a more detailed description of your services.

What about people you don't want to sell to?

For a business owner trying to grow, it seems strange to think about clients you don't want. But in some industries there are customers which don't make sense. In those cases it may actually make sense to write a negative or a negative -- or "exclusionary" -- persona. These personas might include

- Companies which are too big or too advance for your product or service
- Customers who are too expensive to acquire or service because of their proposals requirements, low average sale price, or payment terms.

These personas may be as valuable, or even more so than defining who you do want to sell too.

Putting the pieces together

Sure, this all sounds great in theory, but how do you really do it? Take a look at our example, and then use the blank worksheet to develop personas for your business. Don't forget to give your person a name and a photo.

Example: Hannah the HR Manager



The Who:

Background - Job, Career Path, Education

- College Degree
- HR Director
- Worked her way up through the ranks

Demographics - Gender, Age, Income, Location, Family

- Female, Age 35 – 50
- Married with Children
- Suburban, dual household income \$120,000+

Identifiers - Personality, Communication Preferences

- Calm demeanor
- Assistant screens calls
- Prefers email to printed collateral

The Why:

Real Quotes – About goals and challenges

- It is difficult to get everyone to adopt new programs
- I don't have time to train new employees
- New software integrations are disruptive and painful

Common Objections – Why wouldn't they buy?

- I'm worried I will lose data in the transition
- I don't want to train the entire company
- I am not sure we can afford the update

The What:

Goals – What is the customer trying to achieve

- Reduce turnover / Hire qualified candidates
- Support legal and financial teams

Challenges – What are the obstacles?

- Manage existing workload and roll out with small team
- Limit disruption to primary business activities

What Can We Do? How do we help person achieve goals?

- Simplify data management and reporting
- Onsite and remote training and ongoing support

- The How:

Position Statement

- For small human resource teams faced with implementing new integrated software we offer expertise and affordable support services.

Marketing Message

- Integrated HR Database Implementation and Management

Elevator Pitch

- We give you an intuitive database that integrates your existing software and platforms and lifetime training to bring new employees up to speed quickly.

Exercise: Create Your Customer Persona

The Who:

Background - Job, Career Path, Education

Demographics - Gender, Age, Income, Location, Family

Identifiers - Personality, Communication Preferences

The Why:

Real Quotes – About goals and challenges

Common Objections – Why wouldn't they buy?

The What:

Goals – What is the customer trying to achieve

Challenges – What are the obstacles?

What Can We Do? How do we help person achieve goals

The How:

Position Statement

Marketing Message

Elevator Pitch

Don't forget to give your persona a name and a face

