CUSTOMER PERSONA

a template to create effective
customer personas for your business

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What are Customer Personas?

A Customer Persona, sometimes called **buyer personas** or **buyer personalities**, is a fictional character used internally within a company to represent your ideal prospect.

When complete, it will help you understand the motivating beliefs, fears, likes, dislikes, hobbies, interests, and desires that influence your customer's buying decisions. Your customer persona will help you fine-tune your marketing efforts by adding context to your customer's image within your company.

It is not uncommon to have 2-4 Customer Personas, as not all of your customers will fit into a single personality.

Having a clear concept of your ideal customers will help you understand why some products sell better than others, expose important gaps or conflicts within your sales process, and generate a cohesive marketing message to your end client.

This one exercise can lead to a dramatic transformation of your business.

To create a Business-to-Business persona, include what industry your customers are in, how many employees they have, how much annual revenue they generate, etc.

Remember, even if you sell to other businesses (B2B), you are selling to an *individual* or group of individuals (perhaps a committee). They each have likes and dislikes.

Step 1: Your Ideal Customer

Name: _____

Age: _____ Relationship Status: _____ Children: _____

Job Title: _____ Profession: _____

Household Income: _____ Geographical Location: _____

Other important influences may include housing status (apartment, single family home, or college dorm, for example); is their health status important? Weight? Hair color? Do they have a car?

Business to Business Customers

Industry: _____

Sells to: _____ Annual Revenue: _____

Number of Employees: _____ Years in Business: _____

Geographical Location(s): _____

Step 2: Personal Details

Flushing out personal details of your ideal client will help create a strong fictional character in your mind; this helps you better understand your prospects and will dramatically improve your marketing efforts.

How many years in current position: _____

Current Salary: _____ How many jobs held in career: _____

Political Views: _____ Religious Views: _____

Personal Interests: _____

Hobbies: _____

Step 3: Going Deeper

Think about a typical day in the life of your ideal customer prospect.

Favorite Brands: _____

Favorite Websites: _____

Source for breaking news: _____

Source for industry news: _____

Uses Twitter: _____ Facebook: _____ LinkedIn: _____ Other: _____

Personal Goals: _____

Business Goals: _____

Family Goals: _____

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Step 4: Problem Identification

List at least 3 problems your ideal customer if having that makes them an ideal customer for your business.

1. _____

   _____

   _____

2. _____

   _____

   _____

3. _____

   _____

   _____

Step 5: Worst Case Scenario

What is the worst thing that could possibly happen to your ideal customer if their problem was not eventually solved?

_____

_____

How would this make your customer feel? _____

_____

How might their boss react? _____

_____

What would their friends think? _____

_____

What could happen in their career or personal lives? _____

_____

What could be the financial consequences? _____

_____

What could be the professional consequences? _____

_____

What could be the personal consequences? _____

_____

What is your customer secretly afraid of? _____

_____

Step 6: Best Case Scenario

What is the best thing that could possibly happen to your ideal customer if their problem is solved?

_____

_____

What would their "perfect solution" look like? _____

_____

What is it that they really want, more than anything else? _____

_____

What would they be willing to pay almost anything for? _____

_____

How can your product or service match up to your customer's real needs and desires? How can your business help solve your customer's problem? What is it that you are trying to provide your customers?

_____

_____

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_____

Step 7: Creating the Character

Now, create a short story about your character. What are details about their personal and professional life? What impact is this having on them? What types of frustrations does your customer keep having? What does your customer need more than anything? How can your business best provide the product or service that's needed most? Write down your story here: *make extra copies of this sheet, if necessary.*

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Review your customer personas on a regular basis to make sure that your marketing efforts are being directed to their needs and desires.

For support with this template, or for more information about how to improve your inbound marketing efforts, visit our website at: www.nevermindmarketing.com or call us at 253-693-8070. We offer consultative services and free inbound marketing assessments.

Customer Persona Example

"Manager Mary"

44-year-old Mary is the mother of 2 children, one boy, 16, and one girl, 13. She is highly driven to excel at work, but her family is always the priority. She and her husband of 18 years, Mark, enjoy an upscale living style in Redmond, Washington near Seattle. In her rare downtime, Mary enjoys meeting other mothers for Bible study at a local coffee shop. She enjoys tennis, but rarely has time to compete. She serves on the local high school PTA and oversees her church's Feed the Hungry campaign once a month.

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"Mary" represents the following customer profile:

Business Info

Industry: Consumer software/IT

Job title/role: Marketing manager

Business Size: $10M - $20M

Job Info

Responsibilities: Develop leads and referral sources from website, in-person meetings, community outreach, and increase public goodwill.

Concerns: Selling software licenses, appealing to tech startups in the area, meeting executive demands, meeting goals, and reputation of the brand

Job Grading: Number of leads to sales dept, number of inbound demo inquires

Tools in Use: Customer relationship manager (CRM), email database, website, and some social media

Marketing Challenges: Reach young startup investors and founders.

Watering Holes

Learn New Info: Trade journals, professional development, associations, conferences, sales, basic networking, blogs

Pubs/Blogs: Marketing Minute, Contemporary Today, Startup
                     Stars Magazine, Inc magazine, Tech Crunch blog

Social Networks: Facebook, LinkedIn, Pinterest

Professional Associations: Toastmasters, Young Business
                     Professionals, Seattle Startups

Personal Information

Age: 35-45

Gender: Female

Income: $65,000 – $75,000

Marital Status: Varies

Kids: N/A

Education: Bachelor's Degree

Personal Concerns: Maintaining active, daily role with
                     friends/family. Not letting professional override
                     personal. Time management. Ease of
                     communication without dependency on
                     technology