



How to Build

# *Better Buyer Personas*

**Mike Gospe**

KickStart Alliance



# HOW WELL DO YOU UNDERSTAND YOUR CUSTOMERS?

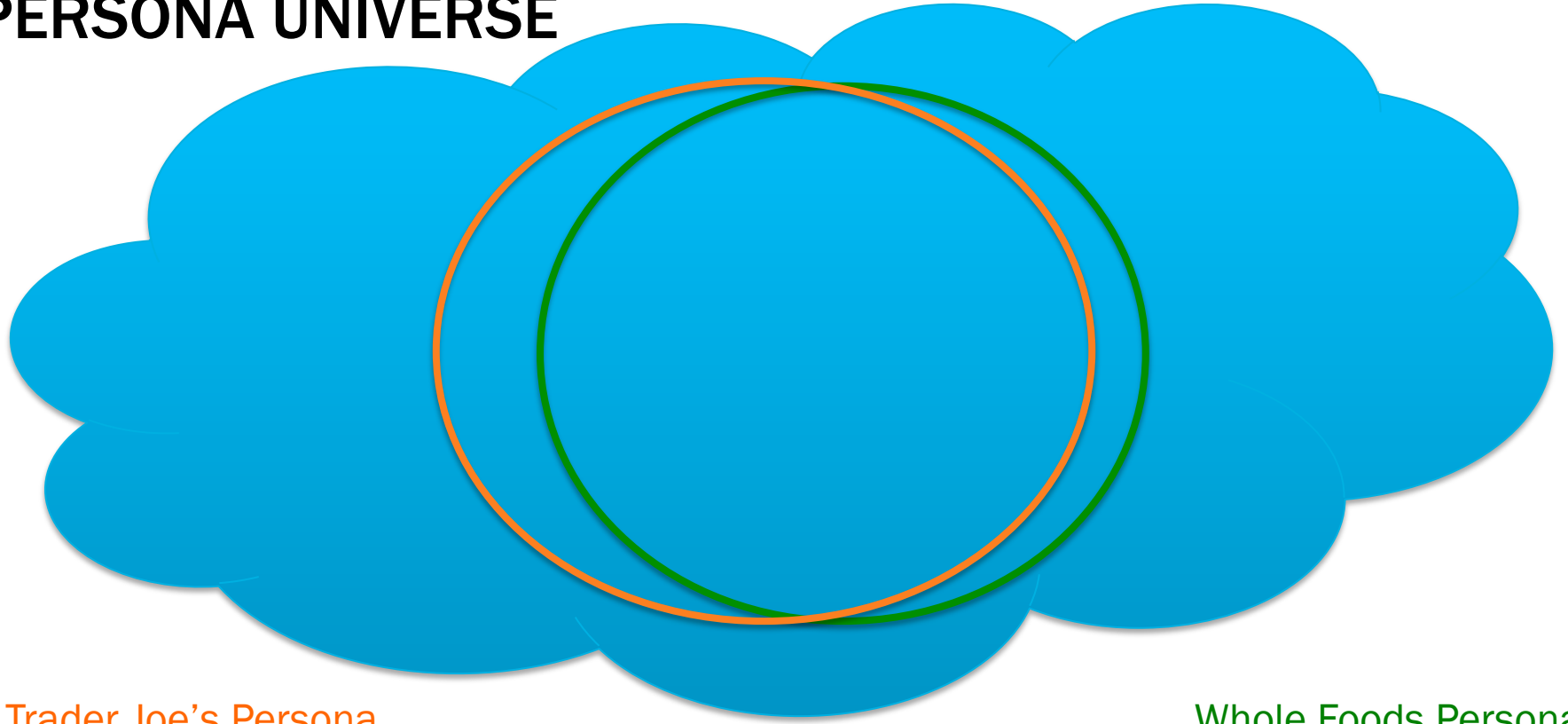


Whoever understands the customer best wins!





# PERSONA UNIVERSE



Trader Joe's Persona

Whole Foods Persona

What does *not*  
having a persona  
look like?

# PROMOTING TOO MANY FEATURES

**WARNING!**  
**BAD THINKING**  
**AHEAD**



**WARNING!**  
**BAD THINKING**  
**AHEAD**



**LOTS OF INFIGHTING**



# TOO MANY REWRITES

**WARNING!**  
**BAD THINKING**  
**AHEAD**



**What does a  
persona look  
like?**

# IS THIS A PERSONA?

*Our target market is  
Chief Information  
Officers of the Global  
5000.*




# IS THIS A PERSONA?

Our target market is  
*Chief Information  
Officers of the Global  
5000.*

- It's too broad
- All CIOs don't think alike
- What's the *empathic* connection with CIOs?
- What is their objective or problem?




# IS THIS A PERSONA?



*We are going after 9  
segments, each with  
9 sub-segments!*

# IS THIS A PERSONA?



We are going after **9 segments**, each with **9 sub-segments!**

- Feels like “everybody”
- 81 sub-segments, **really?!**

# SEGMENTATION IS NOT ENOUGH

We need a  
personal  
connection



# WHAT IS A PERSONA?

- A **personalized extension** of the target segment
- A **fictional** representation of a set of real people who share similar traits, goals, objectives, or experiences
- While a Persona isn't a real person, he or she **must feel like a real person**





# *Respect*

Personas must not be treated negatively as stereotypes

# How do you create a buyer persona?

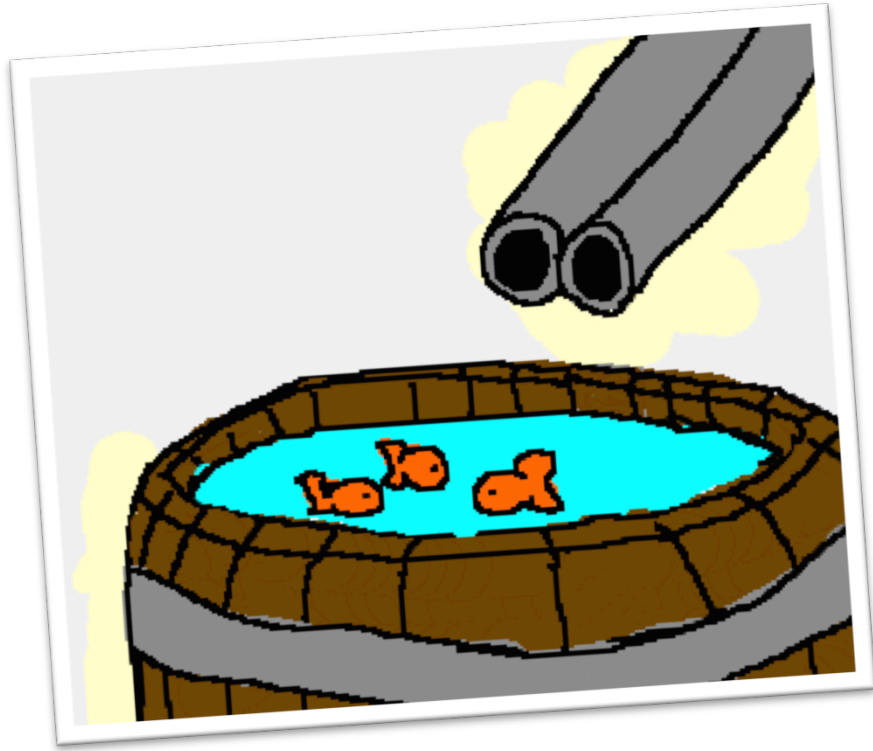


# STEP BY STEP

1. Clarify your marketing objective
2. Gather your resources
3. Form a team
4. Demographics
5. Ideal company profile
6. Psychographics
7. Put it together
8. Socialize it
9. Apply it
10. Learn from it



# STEP 1: CLARIFY YOUR MARKETING OBJECTIVE



- Identify market priorities
- Focus
- Make it easy on yourself

# PERSONA IMPLICATIONS

Marketing Objective	Persona implication
Win 10 new customers	Persona looks like your last “win”
New customer acquisition	“Vertical” industry personas vs. “horizontal” functional personas?
Grow installed base	Limit your persona universe to current customer base
Defend a current segment	Address persona’s fears likely to be exploited by your competition

The more focused your objective, the clearer your persona

# HOW MANY PERSONAS DO YOU NEED?

Many

Few



# ANSWER

*No more than . . .*



You don't have enough time, money, or resources to do more!

# BE “PERSONA SMART”

- ✓ Share personas across your company
- ✓ Think “family” of personas
- ✓ Trust your gut instincts
- ✓ Focus





# HOW TO GET STARTED?



**THERE IS NO “PERFECT”**

**7 5 %**

## STEP 2: GATHER YOUR RESOURCES

Dig through your files



You may already have a starting place.

# STEP 2: GATHER YOUR RESOURCES

## Ask a sales rep



Tell me about your latest win.

Who was the buyer?

What problem were they trying to solve?

Why did we win?

Duplicate your latest win.



## STEP 2: GATHER YOUR RESOURCES



**Search LinkedIn**

Review a few customer profiles

What industries are they in?

What are their responsibilities?

What do they have in common?

Build your own list.

# STEP 2: GATHER YOUR RESOURCES

Attend a conference or tradeshow

- Look who attends
- Ask prospects what they want
- Investigate their needs
- Explore competition

Conduct real-time market research.

# STEP 2: GATHER YOUR RESOURCES

## Interview experts

- Industry analysts
- Target companies
- Academia



Who has the problem?

What are they looking for?

How do they evaluate options?

What's most important to them?

Always be learning.



## STEP 2: GATHER YOUR RESOURCES

### Interview a few friendly customers . . .



1. What is your primary area of responsibility?
2. Tell me about your goals and objectives.
3. What problems are you trying to solve?
4. What does the “ideal solution” look like?
5. What factors played into your purchase decision?
6. Why did you decide to buy our product/service?

Take time to *listen* the your customers' words.

## STEP 2: GATHER YOUR RESOURCES



### Host a Customer Advisory Board or an Executive Roundtable

*Explore topics such as:*

- Industry trends & drivers
- Business priorities
- Issues they care about (that you can help with)
- Joint opportunities
- “Ecosystem” relationships

Allow customers to talk to each other. Listen carefully.

## STEP 2: SUMMARY

	Expanding current markets	Entering new markets
Dig through files/CRM	✓	✓
Ask a sales rep	✓	✓
Spy on a competitor	✓	✓
Search LinkedIn	✓	✓
Attend a conference	✓	✓
Interview experts	✓ (Medium)	✓ (Medium)
Interview customers	✓ (Medium)	
CAB or ERT	✓ (Advanced)	

## STEP 3: FORM A TEAM





If you go it  
alone, you  
politicize the  
output!

# WHO, EXACTLY?



People who have relevant knowledge to share  
People whose opinions you trust and value  
People who will help you socialize the output

WHERE ARE THESE PEOPLE?

Sales

Product management

Marketing

Customer support



**UNFORTUNATELY,  
CORPORATE  
MEMORY IS SHORT**





## DOCUMENT THE PERSONA

- Build a persona *hypothesis*
- Challenge **assumptions**
- Discover **gaps**
- **Align** the team

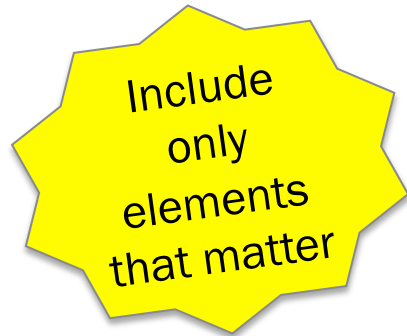
# TEAM RESPONSIBILITIES

- Core team: **4-6 people**
- *Participate* in the exercise
- *Document* the persona
- *Socialize* with a broader audience



## STEP 4: DEMOGRAPHICS

*A basic categorization of a target population.*



More details are NOT always better

# STEP 4: DEMOGRAPHICS

## Who they are:

Gender/age	
Education	
Title/responsibility Goals/objectives	
Role in the purchase process	
Attitude	
Reputation	

*This is only a guide. Customize the template with characteristics and other details relevant to your specific business and target market.*

# STEP 4: DEMOGRAPHICS

## Who they are:

Gender/age


Education

**Title/  
responsibility  
Goals/objectives**

Role in the purchase  
process

Attitude

Reputation



“Responsibilities” are more  
important than titles

*This is only a guide. Customize the template with characteristics and other details relevant to your specific business and target market.*

# STEP 4: DEMOGRAPHICS

## Who they are:

Gender/age

Education

Title/responsibility  
Goals/objectives

**Role in the  
purchase  
process**

Attitude

Reputation



When in doubt, focus on the buyer

*This is only a guide. Customize the template with characteristics and other details relevant to your specific business and target market.*

# STEP 4: DEMOGRAPHICS

## Who they are:

Gender/age	
Education	
Title/responsibility Goals/objectives	
Role in the purchase process	
<b>Attitude</b>	
Reputation	

What is their attitude toward the purchase process? Their job in general?

*This is only a guide. Customize the template with characteristics and other details relevant to your specific business and target market.*

# STEP 4: DEMOGRAPHICS

## Who they are:

Name/gender/age

Education

Title/responsibility  
Goals/objectives

Role in the purchase  
process

Attitude

**Reputation**



What are they known for?

*This is only a guide. Customize the template with characteristics and other details relevant to your specific business and target market.*



## STEP 5: WHERE DO THEY WORK?

*Target the types of companies you want to win.*



# IDEAL COMPANY PROFILE DIMENSIONS



Installed base

Net new clients

Greenfield sites

Fortune 500

Start-ups

Geography

Revenue \$\$\$

Number of employees



# STEP 5: WHERE THEY WORK

## Where they work

Ideal company profile



Not all companies are good targets

*This is only a guide. Customize the template with characteristics and other details relevant to your specific business and target market.*

## STEP 6: PSYCHOGRAPHICS

*Why you think they are a good target for your product.*



Highlight the opportunities for an emotional connection

# STEP 6: PSYCHOGRAPHICS

*Why they are a good target:*

Problem they are trying to solve

Values

Fears

“Pet peeves” (about the buying process)

Information sources

SEO search terms

Focus on them, not you or your product!

*This is only a guide. Customize the template with characteristics and other details relevant to your specific business and target market.*

# WHAT IS THE PROBLEM?



VS.



Is the customer buying a “thing” or a “business outcome”?

# STEP 6: PSYCHOGRAPHICS

## *Why they are a good target:*

Problem they are trying to solve

**Values**

Fears

“Pet peeves” (about the buying process)

Information sources

SEO search terms



What are their values?

*This is only a guide. Customize the template with characteristics and other details relevant to your specific business and target market.*

excellence  
work life balance  
rules honesty trust  
integrity quality service  
ethical teamwork success faith openness achievement  
innovation quality  
conduct collaborate personal growth  
accountability commitment correctness  
organisation participation  
consistency



# STEP 6: PSYCHOGRAPHICS

## Why they are a good target:

Problem they are trying to solve

Values

**Fears**

“Pet peeves” (about the buying process)

Information sources

SEO search terms



*This is only a guide. Customize the template with characteristics and other details relevant to your specific business and target market.*

# FEAR OF . . .



- Failure
- Taking too long
- Making a bad choice
- Missing deadlines
- Cost overrun
- Looking foolish

# STEP 6: PSYCHOGRAPHICS

## Why they are a good target:

Problem they are trying to solve

Values

Fears

**“Pet peeves” (about the buying process)**

Information sources

SEO search terms



What do they hate?

*This is only a guide. Customize the template with characteristics and other details relevant to your specific business and target market.*

# BUYER “PET PEEVES”

- Slow moving vendors
- Paperwork
- Lack of information
- Vendors who don't understand my business
- Obnoxious sales reps
- Vendor's lack of empathy
- Products that don't work
- Buyer remorse
- Miss-set expectations



# STEP 6: PSYCHOGRAPHICS

## Why they are a good target:

Problem they are trying to solve

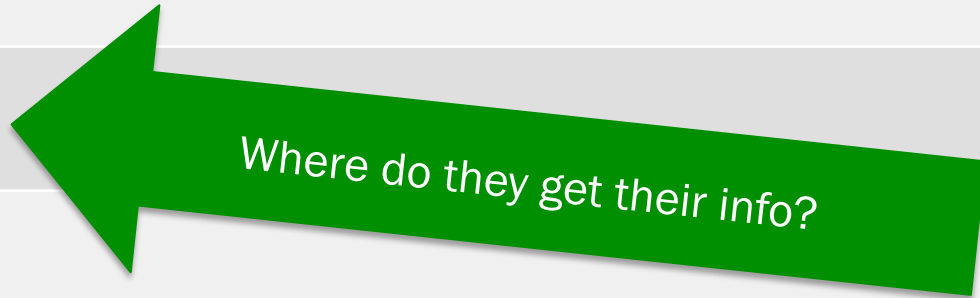
Values

Fears

“Pet peeves” (about the buying process)

**Information sources**

SEO search terms



*This is only a guide. Customize the template with characteristics and other details relevant to your specific business and target market.*

# STEP 6: PSYCHOGRAPHICS

## *Why they are a good target:*

Problem they are trying to solve

Values

Fears

“Pet peeves” (about the buying process)

Information sources

**SEO search terms**



What words do they use?

*This is only a guide. Customize the template with characteristics and other details relevant to your specific business and target market.*

## STEP 7: PUT IT TOGETHER

*Examples*

# “HUMANIZE” YOUR PERSONA

1. Give them a name
2. Illustrate them with a photo
3. Summarize the persona title
4. Distill it down to a single slide



Bob, the skeptical futurist



# EMPATHIZING WITH A PERSONA PRODUCES INSIGHTS

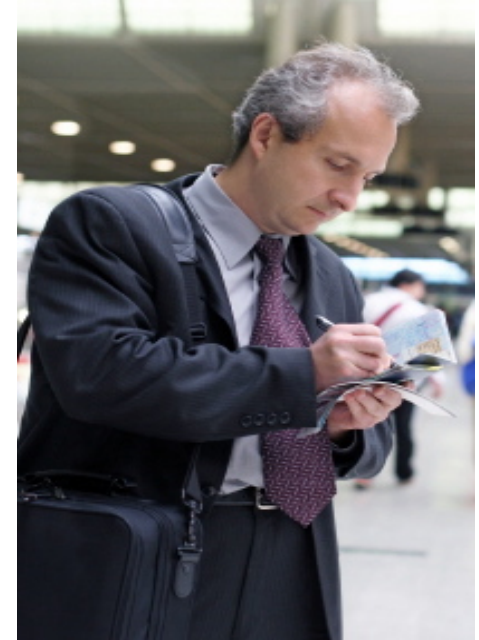
*A few executive types*



The Skeptical  
Futurist



The Corporate  
Radical



The Globetrotter

*These executives share responsibility but have different values and interests!*

# The conflicted procrastinator: the uncertain call center leader

## Who they are:

### Name/Gender/Age

Robert B., 35 - 45 (50/50 male/female)

### Education

College degree; prior role: supervisor of routing/analytics

### Title / Responsibility

Responsible for meeting service-level agreements and minimizing costs

### Role in the Purchase

Drive the team responsible for considering upgrades and new technologies required to evolve the call center. He's a gatekeeper and an influencer

### Attitude

Skeptical, frugal, a procrastinator – keeping the status quo is a safer bet because a failed implementation will cost him his bonus. Big ego. "Likes to be shmoozed."

### Reputation

Risk averse. He's also a job hopper with no allegiance to the company



## Where they work:

### Ideal company profile

Major enterprises (HQ or divisional) with the following characteristics: maturing business, federated model, multivendor technology IT environment. They have multiple call centers more than seventy five seats and are staffed with their own agents

## Why they are a good target for an on-demand contact center solution:

### Values

**Team Leadership:** Sees the big picture; knows a lot about customers, products, company culture

**Knowledge & Expertise:** Studies call center trends and collects knowledge; Is technology savvy

**Innovation:** A laggard. Requires proof points on how others have successfully applied new technologies

### Fear

Making a bad purchase decision that detracts from his compensation and advancement opportunities

### Pet Peeves

Self-serving vendors who don't understand his business; implementation woes

### Information sources

Peers/colleagues, Google search, Call Center associations, vendors, analysts

- The **conflicted procrastinator** reflects the attitude of an executive who is afraid of making a bad purchase decision.
- He is deliberate, slow to making a decision, and requires proof.

# The corporate radical: the executive “change agent”

## Who they are:

<b>Name/Gender/Age</b>	Charlene E., 40 – 50 years (50/50 male/female)
<b>Education</b>	BS plus MBA
<b>Title / Responsibility</b>	VP of Marketing or VP of Products which includes responsibility for leading an internal initiative to make better decisions based on customer feedback
<b>Role in the Purchase</b>	Decision maker. Members of her team will evaluate technologies and solutions to help her organization build stronger affinity with customers
<b>Attitude</b>	Leader; business savvy; high energy; passionate
<b>Reputation</b>	Visionary; decisive; well-regarded in the organization. She has worked her way up the organizational ladder



## Where they work:

<b>Ideal company profile</b>	Customer-facing global enterprise companies that generate more than 5,000 pieces of customer comments/feedback per month (via phone, letter, email, social media). Prioritized industry segments include: telecommunications, Internet retail, consumer
------------------------------	--

## Why they are a good target for an on-demand customer feedback solution:

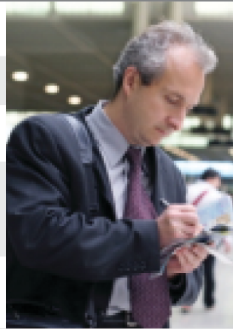
<b>Values</b>	<b>Leadership:</b> works hard to promote positive change that adds value <b>Highly customer-centric:</b> seen as the customer’s advocate <b>Early adopter:</b> personally interested in social media and the latest trends of customer interaction
<b>Fear</b>	Waiting too long or failing to act quickly to meet customers’ evolving needs and expectations
<b>Pet Peeves</b>	Slow-moving vendors and employees who don’t share her passion
<b>Information sources</b>	Peers/colleagues across marketing, customer support, call center communities, Google search, white papers, case studies

- The **corporate radical** reflects an executive who yearns to be an “agent of change” in their company.
- They tend to be early adopters.
- They are not afraid to break away from the status quo.

# The globetrotter: frequent flyer business executive

## Who they are:

<b>Name/Gender/Age</b>	John K.; 40 – 55 (50/50 male/female)
<b>Education</b>	Post graduate; earns >\$150K/year
<b>Title / Responsibility</b>	CXO, sales leaders, or other business leaders who manage outsourced or overseas operations; Sales leaders who are always travelling, especially internationally
<b>Role in the Purchase</b>	Decision maker (when it comes to personal health or productivity issues that arise while travelling/conducting business)
<b>Attitude</b>	Has a positive “can do” attitude; solutions-focused; positive and up-beat
<b>Reputation</b>	A “road warrior”; highly regarded; a frequent flyer recognized by their airline(s) of choice



## Where they work:

<b>Ideal company profile</b>	Silicon Valley hi-tech companies who have outsourced operations overseas, and/or that have sales or other executives who travel more than two weeks per month or 100,000 miles per year
------------------------------	---

## Why they are a good target for a jetlag remedy:

<b>Values</b>	High personal-productivity while on the road; Doing business via face-to-face meetings with employees and customers
<b>Fear</b>	Travel fatigue that impacts their ability to conduct business; losing time or business opportunities because they did not arrive at their destination with a 100% energy level
<b>Pet Peeves</b>	Ineffective or unhealthy stimulants; getting sick while travelling
<b>Information sources</b>	Work peers, executive forums, or other frequent flyers, (Airline) frequent flyer newsletters, and in-flight promotions

- The **globetrotter** persona hones in on travel-related concerns and priorities of the travelling executive.
- Notice the implied differences between him and the occasional, non-business traveler.

## STEP 8: SOCIALIZE IT



- Get ahead of office politics
- Invite feedback
- Educate others on the importance of the persona
- Print copies for marketers
- Persona posters

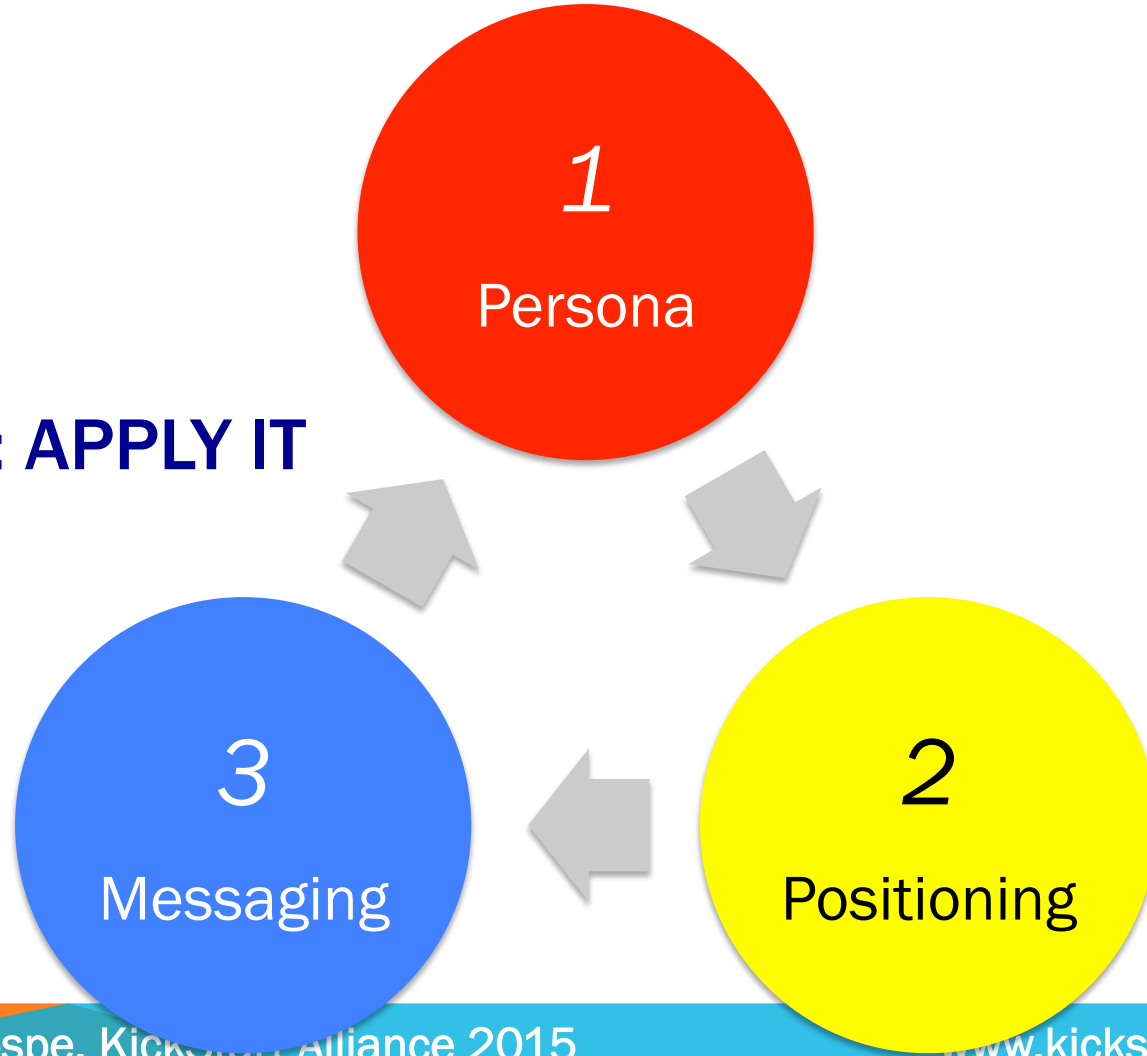
Failure to do this step will cripple your efforts

Historically, we've been selling too low into the organization. We need to aim higher, and this is the right target for us.

I've been selling to this group for 5 years and I've never seen the persona written down before. You got it right. This is exactly who I'm meeting with this afternoon.

**liveops**<sup>®</sup>  
the virtual call center company<sup>™</sup>

## STEP 9: APPLY IT



- Share it
- Post it
- Refer to it
- Use it
- Update it





# BEYOND THE PERSONA

## Persona

- ... understand and empathize with the target

## Positioning Statement

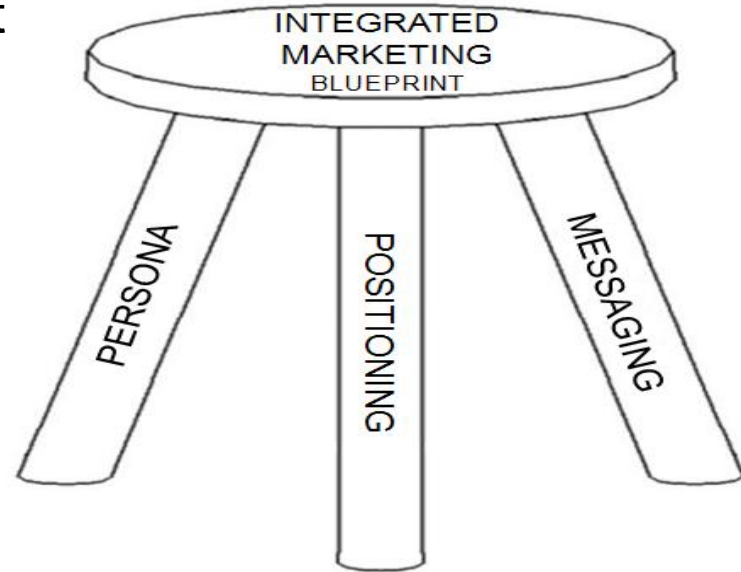
- ... understand your value and differentiation

## Message Box

- ... communicate your value and relevance

## Blueprints

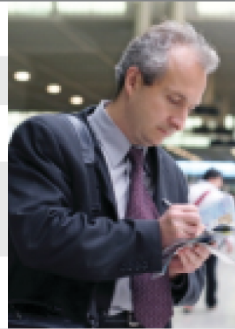
- ... ensure a focused marketing strategy



# The globetrotter: frequent flyer business executive

## Who they are:

<b>Name/Gender/Age</b>	John K.; 40 – 55 (50/50 male/female)
<b>Education</b>	Post graduate; earns >\$150K/year
<b>Title / Responsibility</b>	CXO, sales leaders, or other business leaders who manage outsourced or overseas operations; Sales leaders who are always travelling, especially internationally
<b>Role in the Purchase</b>	Decision maker (when it comes to personal health or productivity issues that arise while travelling/conducting business)
<b>Attitude</b>	Has a positive “can do” attitude; solutions-focused; positive and up-beat
<b>Reputation</b>	A “road warrior”; highly regarded; a frequent flyer recognized by their airline(s) of choice



## Where they work:

<b>Ideal company profile</b>	Silicon Valley hi-tech companies who have outsourced operations overseas, and/or that have sales or other executives who travel more than two weeks per month or 100,000 miles per year
------------------------------	---

## Why they are a good target for a jetlag remedy:

<b>Values</b>	High personal-productivity while on the road; Doing business via face-to-face meetings with employees and customers
<b>Fear</b>	Travel fatigue that impacts their ability to conduct business; losing time or business opportunities because they did not arrive at their destination with a 100% energy level
<b>Pet Peeves</b>	Ineffective or unhealthy stimulants; getting sick while travelling
<b>Information sources</b>	Work peers, executive forums, or other frequent flyers, (Airline) frequent flyer newsletters, and in-flight promotions

- Personas offer clues to positioning & messaging
- *Personas tell a story*

# WHAT IS A “POSITIONING STATEMENT”?

A tool used by marketers to gain internal agreement and clarity around the specific value being offered to specific target audience segments.

A solid positioning statement becomes the messaging cornerstone of the integrated marketing campaign.





# POSITIONING STATEMENT FORMAT

To:

---

(One Target/Persona Type)

is the one

---

(Product/Company Name)

that

---

(Category)

unlike

---

(Key Customer Benefit)

.

---

(Differentiator)

# POSITIONING STATEMENT FORMAT

To: Frequent Flyer Business Executive (Globetrotter persona)

---

(One Target/Persona Type)

FlyRight

is the one

---

(Product/Company Name)

jet lag remedy

that

---

(Category)

allows you to stay healthy through the flight and arrive at your destination feeling as invigorated as when you left so you can get right to work

---

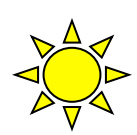
(Key Customer Benefit)

unlike sleeping pills and caffeinated drinks that provide temporary relief, but take a huge toll on productivity later on

---

(Differentiator)





# WHAT IS THE “MESSAGE BOX”?

A tool used to tell our story  
in 1 minute or less



# THE MESSAGE BOX:

A TOOL FOR TELLING YOUR STORY

*Target Persona*

1

## Engagement Message

- What issue of theirs will get their attention?
- What problem of theirs can you solve?

2

## Solution Message

- Regardless of vendor, what is the criteria that must be met to best address the persona's problem?

3

## Reinforcement Message

- Describe your solution and how and why it is the best option for addressing the solution criteria.
- Highlight key points of differentiation (as it relates to the nearest competitive alternatives).

4

## Value Message

- As a result of implementing your offering, how will their life be better than before?
- What metrics can the customer use to prove the value of your offering?

**Your Offering**

# STORY: It's miserable to fly and you know it!

Persona: Frequent flyer business executive

1

**Air Travel is exhausting and takes a toll on your productivity. You're always on the go and can't afford not to be 100%, especially when your meetings begin as soon as you land.**

2

**Frequent flyer business executives like you need to arrive at their destination feeling their best.**

**Passengers want to:**

- Land feeling energized
- Be immune from sick passengers
- Minimize jet lag symptoms

## FlyRight Jet Lag Remedy

3

**FlyRight helps you hit the ground running.**

- FlyRight ensures good energy upon landing, with complete immune system support.
- We have an all natural blend of 12 organic herbs that's safe, effective, and in an easy-to-take capsule form.
- FlyRight has no side effects, eliminating the crash that comes after poor alternatives like drinking sodas or coffee, or the fog following a sleeping pill.

4

**Now you can arrive feeling as clear and as sharp as when you left.**

- FlyRight is the single most effective way to improve productivity while travelling across the country or around the world.
- Join the flight crews from leading airlines that have tested our product and trust it to keep them healthy and productive.



# NOW THAT WE KNOW THE PERSONA, HOW DO WE BEST ENGAGE THEM?

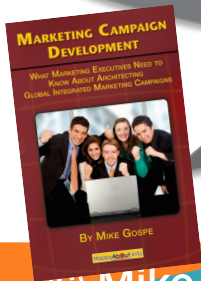
1. Who is the target persona?
2. How do they want to be communicated with?
3. What information are they looking for, and what offers do they want/expect from us?
4. After they respond to the first activity and offer, what happens next?  
And what happens after that?
5. What happens if they don't respond?
6. How will our activities and offers help align them to our solution?

6 questions to designing a Marketing Blueprint

# WHAT IS A MARKETING BLUEPRINT

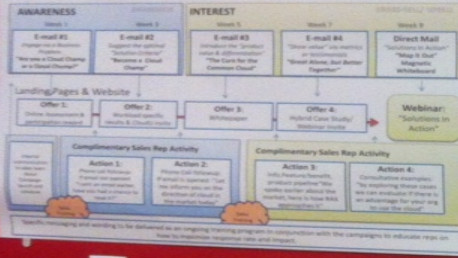
*A blueprint is literally a flowchart of marketing activities and offers that will help accelerate prospects through their buying cycle.*

Blueprints are modeled after 7 general marketing program types. They are key to aligning your organization and maximizing your ROI.

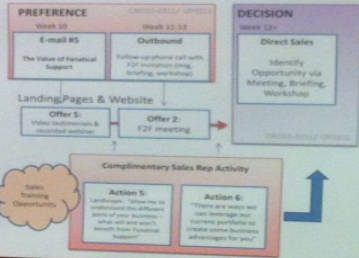


# MARKETING BLUEPRINTS IN ACTION

## GROWTH- MASS PROGRAM BLUEPRINT



## GROWTH- MASS PROGRAM BLUEPRINT

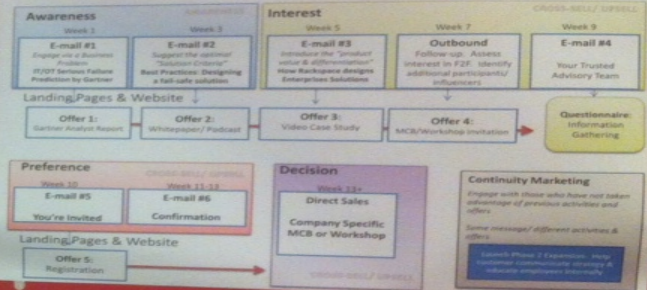


## CONTINUITY

Engage with those who have not taken advantage of previous activities and offers

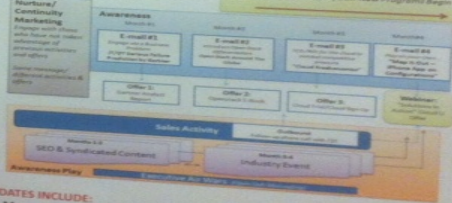
- FDC
- ACP
- ClientShare

## GROWTH- STRATEGIC PROGRAM BLUEPRINT



## Overview of Blueprints--

### GROWTH- CONTINUITY PROGRAM BLUEPRINT

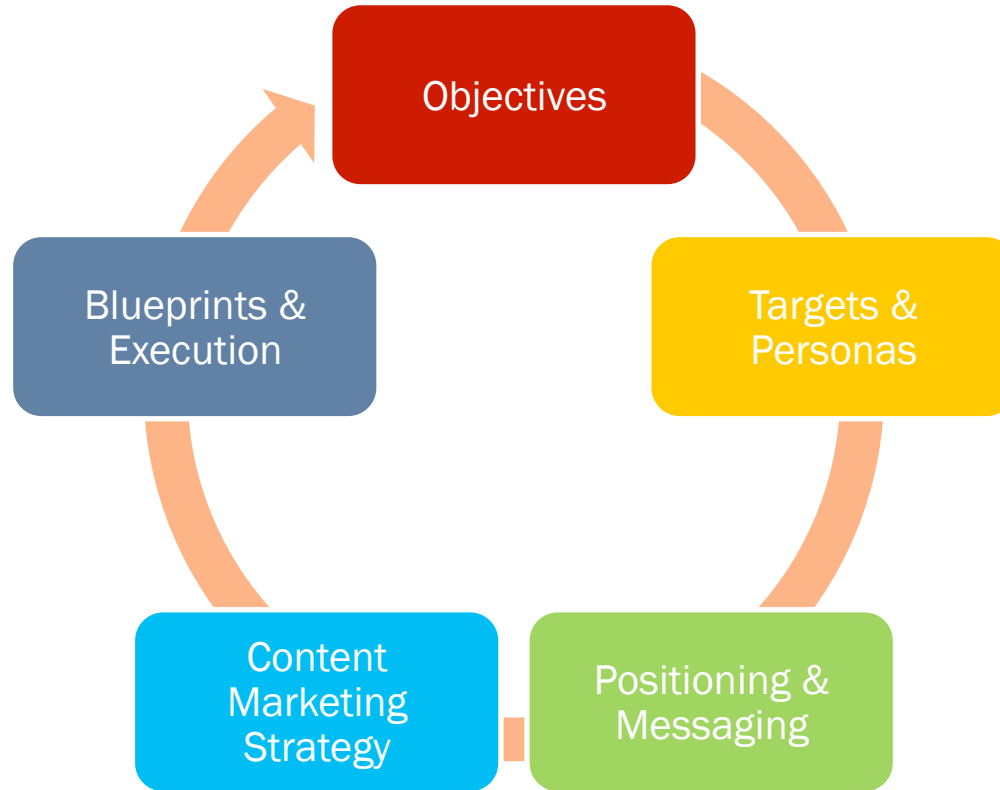


- UPDATES INCLUDE:**
- 1) Message approximately once a month
  - 2) Programs can begin at a later date for cross-sell up-sell opportunity on new solutions
  - 3) Budget is low as most is covered under Mass/Strategic campaigns

STEP 10: LEARN FROM IT *because...*

**CUSTOMER NEEDS  
AND WANTS CAN  
SHIFT AT ANY TIME**

# STEP 10: LEARN FROM IT



This process defines our quest to be relevant to our prospects & customers.

# LOW HANGING FRUIT...

## ACTIONABLE ITEMS

Test & Optimize

1. Develop the Persona
2. Review your language through the lens of the persona
3. Express your customers' problems in their own words
4. Define what information is needed between problem identification and decision to purchase
5. Build an integrated marketing blueprint to deliver relevant content
6. Analyze results: confirm language leads to conversion

A COMPANY THAT CANNOT  
FULLY *EMPATHIZE* WITH ITS  
CUSTOMERS CAN NEVER BE  
MARKET DRIVEN.



Marketers need a higher vantage point.

# WELCOME TO THE MARKETING HIGH GROUND



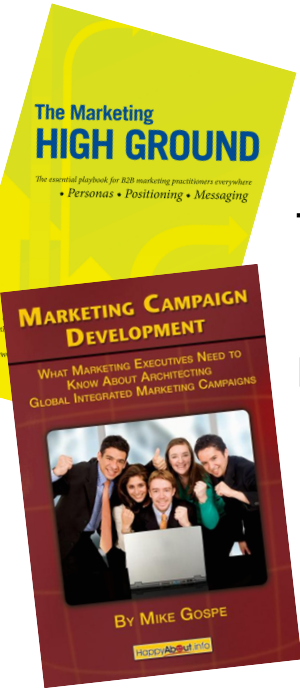
**(noun): that special place where you understand the market so well that you become acknowledged and valued internally as the customers' advocate.**

The *High Ground* is better than being stuck in the weeds!



# OTHER RESOURCES

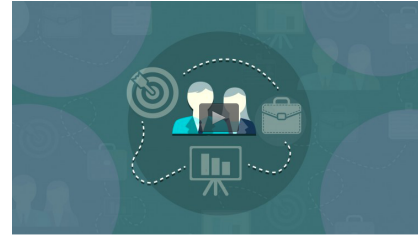
## Books



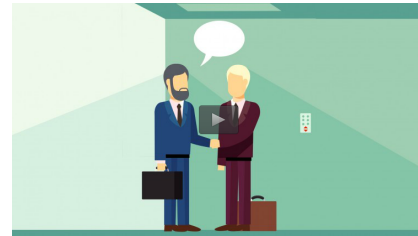
The Marketing High Ground

Marketing Campaign Development

## Online Courses (Udemy.com)



Product Marketing & Management: Positioning



How to Create your Best Elevator Pitch

## CONCLUSION

1. Whoever understands the customer best wins!
2. The persona is the foundation for any marketing plan
3. Use the persona exercise to unite and align your team

*Good luck, and good marketing!*



**Thank you.**

**Please visit our website:  
[www.kickstartall.com](http://www.kickstartall.com)**