



HubSpot Academy Lesson: Getting to Know Your Customer

Video: What Is a Buyer Persona?

"Know thy customer." If there were commandments to the inbound marketing methodology, this would be number one. To illustrate the importance of knowing your customer, let's take an example from Apple. Today, Apple is considered to have first class marketing and sales. However, in 2008 when Apple launched their iPhone 3G in Japan, their sales were shockingly low; they sold a mere 200,000 phones in a market of over 50 million cell phone users. The reason? Apple didn't understand their customer. If Apple had done a bit more research of their potential Japanese customers, they could have discovered that one of the most coveted features of a cell phone to many Japanese individuals is the ability to shoot videos, something the iPhone 3G didn't even have. This story is a reminder that all companies, no matter how big they are, need to know their customers.

The best way to "know thy customer" is to create buyer personas. A buyer persona is a fictional, generalized representation of your ideal customer. Buyer personas help you understand your customers and prospective customers better. They make it easier for you to tailor content to the specific needs, behaviors, and concerns of different types of buyers.

Buyer personas will help you answer questions like: What is your ideal customers' background, goals, and challenges? What are their interests and needs? What incentivizes them? Where do they get their information? Without knowing these answers, it's difficult for businesses to create an effective strategy to attract, engage, and delight their customers. A deep understanding of your various buyer personas allows you to personalize your marketing for different segments of your audience. Instead of sending the same lead nurturing emails to everyone in your database, you can tailor your messaging according to what you know about these different personas.

Buyer personas are comprised of two things: demographic insights and buying insights. Demographic insights describe your buyer, like their age, gender expression, income, family life, hobbies, etc. Buying insights describe how your buyer makes decisions. This includes their priorities, what success looks like to them, what barriers they need to overcome, how they evaluate options, and what attributes they pay attention to when making a decision.

According to the book "Buyer Persona" by Adelle Revella, buying insights reveal:

Which buyers are receptive and which will ignore you.



Which aspects of your solution are relevant.

What attitudes prevent your buyers from considering your solutions.

What resources your buyers trust as they evaluate their options.

Which buyers are involved in the decision and how much influence they wield.

When you create a buyer persona that combines both demographic insight and buying insights, you not only know who your prospects should be, but you also have a better picture of what your company needs to do to get more business. For example, if through your research you've discovered your persona is someone who doesn't have a lot of time and needs to make decisions quickly, you may want to re-evaluate the length of your sales cycle.

Here's an example of a well-researched buyer persona, HR Hannah. HR Hannah is a manager who's concerned with hiring top talent who will perform well. Not only does she recruit, but she's also in charge of retaining, engaging, streamlining the process, and decreasing unnecessary administrative work. Unfortunately, she has too much to do and not enough resources. She has a dwindling budget, and even worse, her manager doesn't always see the need for an HR department. HR Hannah is between 30 and 50 years old, earns a salary of \$90,000-\$130,000 USD, has at least six years of experience, and lives in an urban environment.

In addition to curating information about your buyer persona in a bulleted list, it's important to write a story about your persona. This humanizes your persona, making it easier for everyone in your organization to think of them and remember their story when creating content, or speaking to leads and customers on the phone.

HR Hannah is easy going and always looking for information and best practices. She is revolutionary; she wants to make a difference at her organization. She is decisive and wants the best for her colleagues, customers, and for the organization. She understands that recruiting top talent in this new technological world is a challenge and is open to ideas. HR Hannah understands the reality of her shrinking budget. However, she doesn't want to miss out on quality hires as she understands the staggering costs of bad hires. She never says no, which causes her to work late nights. She wears many hats and she would be happy to get some relief. She may not get a chance to attend many conferences, but she educates herself online through blogs and news magazines. She wants a vendor that is flexible and will listen to her needs. She wants well created, customized, and easy-to-use products and services, and she wants to feel part of the process. She also wants to work with a reliable brand with stellar customer service.

Now, this story might not be exactly true for all of your customers, but it's helpful to have an idea of what people in a similar situation prioritize.



It's useful to create negative personas as well. Negative personas are the people that aren't a great fit for your business. Think of the folks who buy your service or product, are unhappy as it doesn't meet their expectations, and end up parting ways with you shortly after they purchase. Creating negative personas gives you the opportunity to filter folks who aren't a good fit for your business, so you can prioritize and better focus your marketing and sales efforts.

One of the most common questions when creating buyer personas is, "How many buyer personas should I create?" The golden rule is to create as few buyer personas as appropriate. You shouldn't create a buyer persona for each demographic. Instead, group your buyers based on buying insights, or the way they make their decisions. This information is likely more beneficial than demographics. If you group folks who have similar expectations together, you're better able to tailor your content and messaging to fit their needs. If your analysis does reveal groups of people with different expectations, decide whether or not having two different personas will help you create a more persuasive marketing strategy.

Buyer personas are complex and involve many variables. Simplify the process by actively working to understand your customers. Always start by listening to the stories your buyers are sharing with you. These details help shape your ideal customer profile and allow you to create buying experiences that are far less overwhelming, and far more personalized. By integrating this information across your entire business, you're growing into a customer-first company.

Video: Conducting Buyer Persona Interviews

Harold Geneen, a twentieth-century business executive, said, "You read a book from beginning to end. You run a business the opposite way. You start with the end, and then you do everything you must to reach it." This quote can also be used to describe how to create a buyer persona. Start with your customers, or people who have already been through the decision-making process. As marketers, we want to hear in-depth stories about our buyers' decisions. Our goal is to understand the mindset of buyers as they make the decisions we want to influence. Specifically, things we want to uncover through our research include:

What are the demographics of our buyers?

What does success look like to our buyers?

What are the reasons buyers decide to invest in solution similar to ours?

What prevents buyers from considering our solution?

What influences are involved at each phase of the decision making process?

There are many ways to get stories from our customers. Some of the most productive means include surveys, forms, your sales team, social media, and interviews. Surveys are one of the most popular forms of market research, as they can quickly provide information with predetermined questions and choices. Be careful though, surveys are a great way to validate insights you've already gained, rather than create the actual insights. Forms are a quick way to capture persona information. They work well for learning demographic and basic information, like company size,



purchasing needs, how they found you, and more. Your sales team spend the most time talking to buyers, so consider their feedback on the leads they interact with the most. What generalizations can they make about the different types of customers you serve best? Check out social media. On what platforms do your buyers talk about you? Join social media platforms –Twitter, Instagram, Facebook, LinkedIn, Tik Tok – and use a social media monitoring tool to keep an eye out for keywords related to your solution. And finally, interviews. We want to interview our customers, but we also want to interview our potential customers and folks who considered our solution but went with a competitor. This is the best way to gain insight to create your buyer persona.

Interviewing customers, or even people who aren't your customers, regardless of your relationship to the interviewee, is a skill to build. Let's break down the interviewing process into three categories: who to interview, how to increase response rate, and what questions to ask.

When identifying who to interview there are a few main categories to consider. Talk to your customers. They'll tell you what stood out to them during the buying process that made them choose you. Talk to people who considered your solution but chose a competitor. These are extremely valuable interviews, as most of these people will be able to explain what went wrong. Also talk to people who considered you but didn't go with any new solution. This might give you insights into the market as a whole. And finally, see if you can talk to people who never considered you and chose a competitor. Keep in mind that these people are the least likely to interview with you, as they've anyway invested very little time with you during the decision-making process.

Most likely, your sales reps have a database that includes people who fit each of these categories, along with their contact information. Start there. But note, never conduct an interview while folks are actively considering your solution. You don't want to inadvertently disrupt the relationship between the sales rep and potential customer. Pro tip: Have your head of marketing talk to the head of sales to give them a heads up that requests might come through. This way, sales folk will already know why you need their information, as they can be protective of their relationships with customers and prospects.

Referrals are another great option for sourcing interviews – especially if working with Sales isn't an option. LinkedIn allows you to search for people who fit your target personas and surfaces profiles that have common connections with you. From there, reach out to your common connections for introductions.

Finally, you can work with professional recruiters who specialize in finding the right people to interview. A search for "qualitative research recruiters" should yield quite a few agencies . Generally, these third party agencies are completely separate from your company. Recruiters are particularly beneficial for finding buyers who have never considered your solution. This interview is especially helpful if you're trying to enter a new market, launch a new product, or just understand why your solution is excluded from certain people's criteria.

When identifying interview candidates, choose folks who were the most active in the decision-making process, and who made the decision within the last three to six months. If possible,



interview these folks before they've interacted with your company as a customer, for instance, before they go through the onboarding process, as these experiences may cloud their judgement about the buying journey.

Next, let's talk about how to motivate them to respond to you.

In today's world, email is the most effective strategy to get someone to talk to you. If you're feeling bold, you can always pick up the phone and call someone, although you'll most likely get their voicemail and will have to send an email follow up anyway. In your email, say something like, "I'm calling because you recently evaluated HubSpot and I'd like a few minutes to talk about your experience." Make sure they know this isn't another sales call. Additionally, tell them this isn't a survey. People tend to ignore surveys. You can phrase this like, "I'm looking for your candid feedback about what worked and what didn't as you navigated the process." Tell them how much time the interview will take, which is roughly 20 minutes. Be sure to mention if you're offering any incentives; if you have the means, a simple Visa gift card is an easy option. Finally, tell them how to contact you. Take care of everything for your potential interviewee; suggest times but be flexible, and send them a meetings link if you have one.

If you don't get a response from your first communication and have a list of more than 10 options, it's best to move on. If you don't have a decent-sized list, consider hiring a third party agency. These are folks who specialize in finding the right people for you to interview. The rule of thumb is to complete at least 8 to 10 buyer interviews.

Now, let's talk about conducting these interviews. Remember, your goal is to build out a buyer persona by uncovering buyer demographics and buyer insights. Pro tip: The person conducting the interviews should not be involved in the sales process. We want buyers to provide honest feedback about their evaluation process. We want buyers to offer answers free of bias about a particular person.

Prepare for the interview. Research their LinkedIn to learn about their role, company name, when they were evaluating products, and what features were of priority. If LinkedIn isn't an option for you, try to find out as much information as you can about them from your sales team. Even if you can't uncover information about the specific person you're talking to, being knowledgeable about their company will make the conversation run smoothly.

When planning for your interview, remember the objective is to uncover information to support the development of your buyer persona. Hone in on questions that provide context about a buyer's demographics, their reasons for investing in your product, and what influences each phase of their decision-making. Similarly, identifying what success looks like for your buyer, as well as what might prevent them from considering your solution, will offer insight to the persona you're able to engage most effectively.

To get to these answers, use small talk to get tidbits about their life outside of work, hobbies, and if appropriate, other personal demographics. As you transition to talking about work, collect information on their role. This might include the skills required to do their job, what knowledge and tools they use daily, how success is defined in their role, and more. Ask them how they



consume information. What blogs do they read? Which social media platforms do they post on? Find out their shopping preferences. How do they prefer to interact with vendors? How do they do their research? It's helpful to ask them to describe a recent purchase they made to give you an insight. Finally, and most importantly, uncover their decision making process. Questions that give customers space to talk are, "How did you decide...?" Or, "Why did you decide...?" Begin with a question about the moment when your buyer first became aware that a solution was needed. Ask something like, "Take me back to the day when you first decided to evaluate [the category of solution.] What changed or occurred to make it a priority to start looking?"

Keep your interview length to 20-30 minutes. Record the interview with their permission, and be curious. If you want to know more about something but it's not in the script, go for it – the best interviewers discover themes by asking follow-up questions.

Now, let's talk about what happens after you conduct your interview. As you analyze your notes, parse out key insights for each question. If someone says, "We wanted a really easy solution and we also wanted an autoresponder." The reasons for this buyer to invest are easy setup and automated marketing. Look for patterns as you review all the interview data. These patterns will help you develop your ideal buyer persona.

Once you have analyzed your interviews, create your buyer persona. We recommend starting with HubSpot's free Make My Persona tool. The tool asks you for the information you've gathered through interviews, and presents the information in an easy-to-read and ready-to-present manner. HubSpot's Make My Persona tool allows you to download a document that showcases your persona. Alternately, many marketers use PowerPoint to create a presentation about their persona. And finally, the last step is to present your findings to the company. It's important that everyone in the company knows who their buyer persona(s) are. This ensures alignment even as strategies change. Consider presenting your findings at a company meeting. You can also present department by department. Following up with an email is a great way to reinforce alignment across teams, but email should serve as a supplement not your main mode of communication. With alignment around your buyer personas, it's time to get to work! There are a number of different ways your buyer persona affects your marketing, sales, and service strategies. For instance, you can reallocate ad spend. Based on your research, You'll likely know where your buyers spend time online. Audit where you're currently spending resources and ensure its align with where your buyers are consuming content. You can also segment lists based on buyer persona. List segmentation based on buyer persona is the best way to deliver a personalized experience to your buyers. Optimize your webpages. With dynamic content, you can display different messaging to different people based on what persona you have them assigned to.

And finally, create content with your existing persona in mind. Using the demographic and buying insights you've gained, create content specifically tailored to your persona. For example, create a blog post that solves a problem your personas have, and ensure that your blog post uses the language your buyers use.

Creating accurate buyer personas opens the door to becoming a customer-first company. Your entire company's strategy will be in alignment, as Marketing, Sales, and Service solve for a



common goal. Conducting insightful and relevant interviews takes dedication and creativity. The payoff is developing accurate buyer personas and establishing a customer-first company mindset. Let's get to work!