

PERSONA TEMPLATE GUIDE

STRATEGIC TARGETING
FOR SALES & MARKETING

THE VALUE OF A PERSONA

The development of personas has been an important trend that emerged in marketing over a decade ago, related to identifying the right audiences for marketing and sales activities. Personas became prevalent not only for agencies but for in-house marketing teams, as well. Investing time, money and resources on developing customer personas provides a deep understanding of your ideal customer behaviors, needs, and motivations. By enabling a customer-centric focus for your organization, personas more accurately inform sales and marketing decisions for better outcomes.

This workbook will help you develop specific customer personas by scaling a market audience into a segment of that market, then into a target within that segment, and finally, into an ideal buyer persona.



Segmentation is the subset of the entire marketplace. A target audience is the subset of a market segment. Buyer personas are specific and detailed characteristics and perspectives of a fictional person who represents your best buyer. You'll create your customer persona based on demographics and firmographics, as well as behaviors, needs, and motivations.

When developing your target personas, start with segmentation, then move to your target audience, then create your persona profile.

SEGMENTATION

Characteristics and behaviors that help define a user segment, that may include gender, age, income, education, occupation, attitudes, values, lifestyle, geography, purchasing patterns, loyalty status, and other firmographic factors


TARGET AUDIENCE

Group of people within a segment that can be identified, be contacted, make purchasing decisions about your product, and afford your product

BUYER PERSONA

Individual profile of a fictional target member; detailed and comprehensive, reality-based, yet fictional identity and story of your very best customers, including interests, viewpoints, motivations, activities, and concerns

Make a copy of this template for each persona. Complete insights with customer experiences and interviews.

<p>Marisa Marketer Marketing Leader (CMO, VP Marketing)</p>	
<p>Primary Job Responsibilities:</p> <ul style="list-style-type: none"> • Developing and implementing a cohesive marketing plan to increase brand awareness • Setting current and long-term goals for internal teams • Designing and reviewing the Marketing department's budget • Manages a team of 6 • Direct report to C-level • Has purchasing authority 	<p>Professional Background</p> <ul style="list-style-type: none"> • Career marketing professional • Business degree with MBA • 15 years experience <ul style="list-style-type: none"> ○ Marketing: healthcare company (5 yrs) ○ Account manager: local ad agency (3 yrs) ○ Advancing roles: current company (7 yrs) <p>Company Info</p> <ul style="list-style-type: none"> • Healthcare Technology • Privately held company • Headquartered in Austin, TX • \$75 Million revenues; 250 FTEs
<p>Role in Buying Journey</p> <ul style="list-style-type: none"> • Decision maker • Influencer 	<p>Budget Control</p> <ul style="list-style-type: none"> • \$3 million annually, excluding in-house marketing team, loaded salaries
<p>What are the steps of the buying process?</p> <ol style="list-style-type: none"> 1. Get contract from Vendor 2. Submit to Legal for review 3. Upon legal approval, engage appropriate support leaders in technology and HR, as needed 4. Manage deliverables, timelines, and budgets 5. Approve and forward all invoices to Accounting for payment 	<p>Reasons They Will Buy</p> <ul style="list-style-type: none"> • Add value not already available from her team and tools • Additional capacity to complete special projects • Provable ROI <p>Reasons They Will NOT Buy</p> <ul style="list-style-type: none"> • No room in the budget • Already have people and tools that deliver the same solution • Don't need the solution now • Already have existing vendor relationships who offer similar competitive solutions • Not an approved vendor

<p>Job Performance Measurements</p> <ul style="list-style-type: none"> • P&L management • Team performance (internal CSATs) • Lead generation • Revenue growth • Project completion, on-time and on-budget 	<p>Motivations</p> <ul style="list-style-type: none"> • “Getting things done” • Career growth • Smart information and insights to share with executive team • High-performing marketing team • Increasing revenues
<p>Most Rewarding Aspect of the Job</p> <ul style="list-style-type: none"> • Mentoring her team in the execution of the work 	<p>Single Biggest Successful Event</p> <ul style="list-style-type: none"> • Promoted to the executive team
<p>Most Disliked Aspect of the Job</p> <ul style="list-style-type: none"> • P&L management 	<p>Single Biggest Challenging Event</p> <ul style="list-style-type: none"> • Too much to do and not enough time and resources to do it all
<p>Behaviors</p> <p><i>(Where do they write, speak or attend?)</i></p> <ul style="list-style-type: none"> • HIT conferences including HIMSS • Local HIMSS chapter • Healthcare IT News • Healthcare Social Media Blog • Cerner Health Conference 	<p>Influencers</p> <ul style="list-style-type: none"> • Gartner, Forrester • Follows medical innovators and technology focused doctors on twitter and LinkedIn • Healthcare Tech publications <ul style="list-style-type: none"> ○ Becker’s Hospital Review ○ Physician’s Practice blog ○ HealthTech Magazine ○ Medical, Marketing & Media
<p>Primary Personality Trait</p> <p><i>(Pick their most prominent trait.)</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> Openness to experience <input type="checkbox"/> Conscientiousness <input type="checkbox"/> Extraversion <input checked="" type="checkbox"/> Agreeableness <input type="checkbox"/> Neuroticism 	<p>Personal Preferences</p> <ul style="list-style-type: none"> • Email as primary • Schedule time via admin (Gatekeeper) • Savvy and direct <ul style="list-style-type: none"> • Looking for a strategic partner, not another vendor to manage • Prefers to lead the buying process • Knows how to navigate the company landscape and politics • Wants the narrative - “help me to tell the story more effectively”