

# Ignite

## YOUR BRAND

### LEADERSHIP & BRAND STRATEGY COACHING PROGRAM

## MODULE 2 - WEEK 7

### Going Deeper with Customers: Customer Personas



The last few weeks you've been getting to know your customers more deeply, including conducting market research and interviews. Within your audience, there are likely key "types" of customers, or "personas; things that can group people together based on who they are and what they believe. Thinking about your customers as "personas" can be helpful to consider possible key segments within your audience, as sometimes you may wish to direct your offers and marketing toward one of those specific segments. For example, in my business, one of my segments are entrepreneurs where the other are event planners who book speakers for events. I offer services to both audiences, and my services are all aligned under one brand, but I offer different services for different customer segments.

You can build your brand strategy at a more refined level by creating customer personas. This process helps bring your various customer types to life by seeking to understand their desires and decision-making processes.

Personas are based on the analysis and research of real people who fit within your target audience. This helps you build a detailed picture of hypothetical customers. Personas include far more information, such as personal motivations, what the decision-maker values, what kind of communication they prefer, etc.

Diving deeper into who your customer's are allows you to see things from their perspective, from that customer's frame of mind, understanding their pain points, goals, and their decision-making process. This helps you learn how to speak their language so that you can more effectively market to them and close the sale. After all, not every customer thinks the same or makes their decision in the same way so the more that you are empowered to adjust to that customer's needs and decision making process, the more effective your sales processes will be.

Knowledge about your customer is power, so let's dive in and help you define your customer personas!

A handwritten signature in white script that reads "Amber".

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### WHAT IS A CUSTOMER PERSONA?

A customer/buyer persona is a fictional, generalized representation of your ideal customer(s). A buyer persona is a visual example that shows what prospective customers are thinking and doing as they weigh their options to address a problem that you and your company can resolve. A customer persona can become detailed, focusing on specific attitudes, beliefs, concerns and criteria that drives that prospective customer to choose your service/product. You will likely have 3-5 different personas for your product or service.

### A "NEGATIVE" CUSTOMER PERSONA

A buyer persona represents the ideal customer, whereas, a negative persona is an “exclusionary” persona that outlines who your buyer is likely NOT. This can be just as helpful as identifying your buyer persona because it allows you and your team to recognize who you are not going after in business so that you don't waste valuable marketing resources focusing on the wrong audience. Ever heard of JOMO (Joy of Missing Out)? It's kind of like that!

### WHY IS A CUSTOMER PERSONA HELPFUL?

A customer persona helps you and your team focus more clearly on your target audiences so you stay focused. When you have insights into what your buyers think, you have powerful knowledge that will help you to align marketing decisions and strategy, to market directly toward those personas.

### DEVELOPING YOUR CUSTOMER PERSONAS

You will likely have 3-5 (or more) different buying personas. You should create a persona for each different core customer type as your marketing message and sales techniques might be adjusted based on who you are marketing toward. Review the sample outlined on the next 4 pages where the 4 sections of the Customer Profile are broken out: Who, What, Why, How. I have outlined 1 persona type as an example: Busy Business Owner Bob. He represents 1 of 5 core types of clients that my team and I usually work with. Business owner Bob is different from Marketing Mary or the Aligned Aspirer, but all three are people who represent real life customer types for my company.

Use this space to make any notes on insights you've gained so far:

### PERSONA NAME: BUSINESS OWNER BOB

#### 1. SEMI-FICTIONAL CHARACTER BACKGROUND

State what type of job title or role your most profitable customers fit. Who is this person, what's their job, career path, family?

#### 2. DEMOGRAPHICS

What's the typical age, income, gender, education, and location of your customer? This will help drive your advertising targeting.

#### 3. DAY IN THEIR LIFE

Think about what a day in the life of your persona looks like. This way, you can better understand their challenges and motives.

#### 4. IDENTIFIERS

What is their demeanor and communication preference? Fast and furious, calm and organized? If you are targeting professionals/B2B, do they have someone screening their calls? If you are B2C, do they typically ask for info in the mail first?

Business owner of 10-15 yrs, small local business with \$850,000 - \$3,000,000 in sales annually, it's running smoothly with staff of 10-15. Will run his business into his 60's (10 years out from retirement) and sell to a family member/employee. Married with 3 teenage children, wife works part-time. He's the primary earner. He works hard and they live a comfortable life.

Age is 40-55 years, household income of \$150,000-\$250,000 He has some college education, learned a lot by working on the job. He's located in Dane County WI. They have a 2nd property in northern WI.

Starts his day at the office by 7:30am, heads out to customer job(s) from 8:30a-3p, he's checking emails throughout the day and catching phone calls when he can. He has an assistant to take incoming new customer calls, but his phone still rings a lot. He stops back at office from 3-4p to check in on his staff, deal with paperwork. He heads to his kid's after school sporting event by 4:30.

His personality comes off as easy going; however, he needs to work quickly to keep up with work-life balance, so while he'll greet you pleasantly, he wants you to get to the point and bring him value because he doesn't have time to waste with long phone calls or meetings. If you can show him value, he'll listen to you. He has an office admin screening most of the incoming calls and emails.

### PERSONA NAME: BUSINESS OWNER BOB

#### 5. PERSONA GOALS

While business is good, he wants to steadily grow sales. He knows that while business is good now, there's always risk of an economic change, and he wants to improve leads and marketing efforts to build the brand and have more leads coming in than they can handle so that if business slows down they have enough leads in the funnel and built up brand awareness to get them through tougher times without having to let staff go. He wants to build more wealth so that he can more comfortably enjoy retirement with his wife. He wants his kids to go to college and possibly take over the family business.

#### 6. PAIN POINTS

He's too busy to deal with implementing more modern lead generation tactics and better marketing strategies. He doesn't have time or knowledge to do it himself and nobody on his team has that skill-set either. He doesn't want to bring a full-time marketing specialist in-house because someone with this skill-set would be too expensive for the business, and he doesn't want to manage them, but he wants the work done well, so he needs another solution. He's also tired of marketing companies pitching him so many different options; he doesn't know what the best plan is and doesn't want to be "sold new things," if it's not a good strategic move. He wants to be advised on the best solution that will actually work.

#### 7. TYPE OF EXPERIENCE DESIRED

He wants his marketing provider to be smart, fast-thinking, and to the point. Someone who doesn't over-complicate things. Someone he can trust to lead him down the smartest path. He wants to receive updates monthly with the most important items, but don't bog him down with emails/phone calls to discuss every step of the process.

### PERSONA NAME: BUSINESS OWNER BOB

#### 8. DECISION CRITERIA

What aspects is this persona weighing about your product/service against your competition? What factors lead to their decision making? By understanding how they make their decision, you can focus on the aspects that are most critical to your buyer.

He is thinking: How easy are they going to make it to work with them? Will they be responsive without a lot of hoopla and processes where things take days/weeks to get an answer? Do they have case studies, past proven successes with similar-sized local businesses? Can I trust that they know what they're doing? Are they forward-thinking about trends in marketing so that they can advise me on the best use of my marketing investment?

#### 9. PERCEIVED BARRIERS/OBJECTIONS

Are there concerns that cause your buyer to believe that your company is not their best solution? By looking at the common objections, concerns, and their reasons for not buying from you, you can make revisions to your product, offering or sales process to get more of this persona to buy your product or service.

Cost won't return an ROI. It will require too much of his time to manage the marketing team (agency).

#### 10. REAL CUSTOMER QUOTES

What are real statements or quotes that this persona type has said to you before?

"I like that you break things down in a practical way."  
"I wish I could hire you, but I can't afford it right now."  
"We need to reverse our losses and get back on track. We know we have to pull the trigger and make this investment or else we won't have a business in a year and we don't know what to do with our marketing. We need you."  
"I don't know a thing about social media, but I know we need to be there."  
"If it gets results, I have no problem investing more."  
"I'm busy and don't have time for meetings. I trust you to tell me what needs to be done."

### PERSONA NAME: BUSINESS OWNER BOB

#### 11. INFORMATION RESEARCH PROCESS

How does this customer seek out information and answers? By understanding where they do their research and when, you can better target your marketing to your customers by reaching them in the places, ways and at the right times when they are seeking out information.

#### 12. STORY FORMAT

Take the info you outlined and write it in story format so it's easier for your team to visualize and relate to. This will help you and your team create your marketing messaging and content, and speak with leads as you will have a greater understanding about a day in their life, their needs, their problems, and what they desire from you in the sales process. You may like to add an image to your customer persona to make them more real and easier to visualize marketing to a real person, thus creating a more authentic approach to your marketing.

#### 13. YOUR MARKETING MESSAGE

How you should describe your solution to your persona

They don't do a lot of seeking out of marketing companies, they know they need it and they rely on the companies that follow up with them over and over, eventually they take a meeting if they like what you've had to say. They also trust referrals from friends who are also business owners. Once they meet, they might check out your website, other work you've done and read reviews online. They rely heavily on input from friends/other business owners and personal referrals.

Busy Business owner Bob is 45 years old; he's owned his business for 15 years. He's in the trades industry and has a successful business with 10-15 employees and wants more steady leads and better marketing systems in place so that if the economy ever slows, he's in a stable position. He wants to work with a marketing company that can work efficiently and to the point without bogging him down. He wants a marketer that delivers an ROI; if you can make his business money, there's no limit to what he'll invest for your services, it just needs to work. He wants a company that is easy to work with, doesn't over-complicate the process and is at the forefront of marketing trends. He wants a marketing company that has integrity, takes ownership for potential mistakes, and makes it easy for him to buy from you and to work with you.

We work with busy business owners to take the marketing off of your plate. We help you develop your brand as a long-term growth strategy, while also creating an effective and cost efficient marketing strategy, including up-to-date digital strategies, helping you get better systems in place that delivers a measurable ROI so that your business can grow steadily, without bogging you down.

### CUSTOMER PERSONAS RECAP

By creating customer personas, you and your team will get a better visual of who you serve. This will help drive your marketing messaging and strategy so you can focus on those core personas.

Download the customer persona worksheet from within the membership site. You may wish to print the customer persona worksheet and fill it out for each persona type. You may even attach photos to each persona and write up profiles to keep at the office for you and your team to reference as a visual guide!

### BRAND PRACTICE: CUSTOMER PERSONAS

Use this space to write down any takeaways that you have from walking through the Customer Persona Exercise:

# CUSTOMER PERSONA WORKSHEET

## WHO YOUR PERSONA IS

### 1) SEMI-FICTIONAL CHARACTER BACKGROUND:

State the job title or role your most profitable customer has. Who is this person, what's their job, career path, family?

2) **DEMOGRAPHICS:** What's the typical age, income, gender, education, and location of your customer? This will help drive your advertising targeting.

3) **DAY IN THEIR LIFE:** Think about what a day in the life of your persona looks like; this helps you better understand their challenges and motives.

4) **IDENTIFIERS:** What's their demeanor and communication preference? Fast and furious, calm and organized? If you are targeting professionals/B2B, do they have someone screening their calls? If you are B2C, do they typically ask for info in the mail or research online as a first step?

PERSONA NAME:

## WHAT THEY CARE ABOUT

5) **PERSONA GOALS:** What are the goals of this persona? What do they want to accomplish in their business and personally in their life and in their household?

6) **PAIN POINTS:** What challenges does this customer face? If you can get to the root of their actual challenges, you can develop messaging that speaks to solving that problem for this core audience.

7) **TYPE OF EXPERIENCE DESIRED:** What does this persona expect and desire once you earn their business? If you understand their expectations, you can better create the process from lead development, to sale, to delivery, to deliver the type of customer experience that they expect and want.

# CUSTOMER PERSONA WORKSHEET

## WHY THEY WOULD/WOULDN'T BUY FROM YOU

8) **DECISION CRITERIA:** What aspects is this persona weighing about your product/service against your competition? What factors lead to their decision making? By understanding how they make their decision, you can focus on the aspects that are most critical to your buyer.

9) **PERCEIVED BARRIERS/OBJECTIONS:** Are there concerns that cause your buyer to believe that your company is not their best solution? By looking at the common objections, concerns and their reasons for not buying from you, you can make revisions to your product, offering, or sales process to get more of this persona to buy your product/service.

## 10) REAL CUSTOMER QUOTES

PERSONA NAME:

## HOW THEY MAKE DECISIONS

11) **INFORMATION RESEARCH PROCESS:** How does this customer seek out information and answers? By understanding where they do their research and when, you can better target your marketing to your customers by reaching them in the places, ways and at the right times when they are seeking out information.

12) **STORY FORMAT:** Put this persona's info into a story format. This will help you/your team as you create your marketing messaging, creating content and when speaking with customers, you will have a greater understanding about a day in their life, their needs, their problems and what they desire from you. You may like to add an image to your persona to better visualize marketing to a real person.

13) **YOUR MARKETING MESSAGE:** How you should succinctly describe your solution to your persona