Guide to Buyer Personas

A primer on creating and using buyer personas.
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What are buyer personas?

Imagine it’s Friday night, and your family is deciding which restaurant to pick for dinner. Everyone has different factors that are important to them.

- The kids want a restaurant with crayons and chicken fingers.
- Mom wants a place with no wait and a nice wine selection.
- Dad wants to spend less than $50 and to be able to watch the game.

Each of these different people have different criteria for making the dinner decision. And, each person is an example of a buyer persona.

Buyer Personas are a tool for understanding all of the different types of people that are involved in buying your products and services – and how they make their decisions.

What goes into a buyer persona?

In the dinner example, you actually deal with multiple buyer personas. Mom, Dad and kids are all examples of buyer personas. They all have their own criteria for deciding where to eat dinner, yet they all also influence the other person’s decision. (Because everyone wants the entire family to be happy.)

In a business-to-business (B2B) environment, your buyer personas will typically be any person that is involved in the decision to purchase your company’s products.

For example, personas evaluating a software product might include:

- The primary user of the software
- Vice President of the department making the purchase
- Someone from the IT department
- Someone in the finance department that must approve the purchase order
- Someone in legal that must approve the contract
### Buyer Persona Name

| Job Title | Marketing Manager |
| Industry | Banking |
| Personality | Creative, Spontaneous, Cheerful, Smart, Skeptical, Educated |
| Reads | Mashable, MarketingProfs, Buzzfeed, CNN, New York Times |
| Buying Criteria | Reliability, user-friendly, email marketing features, 24/7 support, training guides |

(Mailchimp has a [great example](https://www.mailchimp.com/) of how they created their buyer personas.)

### The Benefit of Buyer Personas

What's the big deal? Of course we know that our products need to be reliable and user-friendly. Why do we need personas?

The value is in the details. It’s about truly understanding who your customers are – not just your users. Buyer personas help you:

- Understand all of the different personalities involved in buying your products
- Ensure you have the right product features, marketing collateral and content for each persona
- Know what information each persona needs as they go through the different phases of evaluating your products
- Know which personas are most important. Who is your primary customer versus an influencer?
• Most importantly, understand how your buyers think. What language and terms do they use? Where do they learn about new products. What special functionality do they require?

Instead of just debating internally about which product features to add next or which marketing campaign to run next, buyer personas give you a way to anchor these debates in reality. Now, you can ask, how will this decision affect “Sally the Accountant” or “Jerry the IT Manager?”

How to Get Started

To start building your buyer personas, you'll want to start thinking about the different types of personas that purchase and use your products. You'll then want to research and interview customers to verify these ideas.

The Buyer Persona Institute also has a number of great (and free) resources for helping you build out your buyer personas.
How to create buyer personas

As discussed, buyer personas are a powerful tool for understanding the different people involved in purchasing your product and how they evaluate your company and competitors.

Let’s walk through a brief guide on how to create buyer personas.

The end goal of this process is to create a synopsis of each buyer that will help your entire company understand:

• Who they are
• Their role
• How they evaluate your company and products

If you need a refresher on what an ideal buyer persona looks like, the Buyer Persona Institute has a great example of a persona available on their website.

Audit Your Personas and Create a Short List

To get started, you must first understand what types of people are involved in evaluating and purchasing your products.

For example, with an email marketing product, these types of people would typically be involved:

• Email marketing manager / digital marketing manager
• Director or VP of marketing
• IT manager
• Legal associate

If you need help compiling a list of personas, you can start by:

• Analyzing your CRM records and the job titles for your customers. What job titles appear most frequently?
• Asking your sales team. Some people involved in the sales process may not be recorded in your CRM. Interview your sales team. Ask “What influencers come into play during the sales process? ”

From here, you should have a list of 3-7 common personas that you can start to investigate.
Schedule Interviews With 5-10 People From Each Persona

Next, you'll want to interview multiple people that are representative of each of your buyer personas. The goal is to understand the details – what makes them tick?

When reaching out to schedule the interview, offer to keep the interview short and light-hearted.

Here’s a simple email template you can use for scheduling interviews:

**Subject:** Interview Request

**Body:**

Hi Jane,

My name is John Doe and I’m on the marketing team at ACME.

We’re doing a project to help us better understand our customers. As part of the project, we’re scheduling brief interviews with customers like you.

Would you be willing to spend 20 minutes on a brief call with me? I’m not looking to sell you anything, but I’d really appreciate your perspective on a few questions.

Please let me know if there’s a day/time we could schedule.

Thank you,

John
Interview Format and Structure

When interviewing people for your buyer personas, your number one goal is to walk away with an understanding of what makes them tick, especially when it comes to evaluating your company’s products.

In the interview, you’ll want to ask about their personal background, their job title and role. Then, ask how they think about your product and other vendors.

Here’s a template of standard interview questions you should consider asking:

**Background**
- What did you study in college? Where did you attend?
- What are your hobbies? What do you do in your free time?

**Role / Company**
- What is your job title?
- How many years of relevant experience do you have?
- What industry is your company in?
- How many employees does your company have?
- What are your responsibilities?
- Where do you learn about new products and services?

**Product/Vendor Specific**
- What were you looking for with a vendor and product?
- What was your involvement in the selection process? Were you the budget owner? The decision maker?
- How did you start evaluating different options? What was the process?
- How did you hear about us?
- What materials, collateral and other information did you use to guide your decision?
- How important was pricing?
- How did you expect to measure success with this purchase? What outcomes were you looking for?
- What were you most fearful of with this purchase?
- How important was this purchase compared to all of your other projects?
Summarize Your Findings

At this point, you will have data on anywhere from 15 - 75 interviews. You'll want to pull your team together and start to summarize the data. There's no secret to this. You'll simply want to look for patterns and similarities in the interview responses and start to draw conclusions about each buyer persona.

And, that's it! You now have brand-new buyer personas to guide your marketing campaigns and sales process.

Tips That Sometimes Get Missed

1. **Always do interviews.** Some people recommend using surveys and questionnaires to build your buyer personas. Don't do that. During the course of the interview, your interviewees are going to bring up new things you hadn't previously considered. You need to be able to lean in and say “tell me more about that.” Surveys miss those details.

2. **Interview people from companies that use competitors’ products.** These people may have looked at your company, but they chose to work with a competitor. They most likely have slightly different priorities and viewpoints than your customers. To grow your business, it’s critical you include data from these people in your personas.

3. **Start by interviewing 5-10 people for each persona.** By the 10th person you interview, patterns will typically start to form.
Incorporating buyer personas

Now that you understand what buyer personas are and how to create them, it’s time to ingrain them into your marketing and sales processes.

Do you need a better click-through rate on your advertising campaigns? Need a better conversion rate on your website? Is your sales team encountering unexpected objections?

Buyer personas will focus your entire organization on the right customers to help you get the most from your efforts. Furthermore, you’ll make your customers happier by speaking their language and giving them exactly what they need to be successful.

Here are simple tactics that your teams can use make sure their efforts are aligned with the need of the customer.

1. Content Marketing

Most marketing teams have a “content strategy,” but is that strategy focused on building the content your customers need? It’s time to make sure your content is focused on your buyer personas.

Your content teams should start with these questions:

Do you have content created with each key buyer persona in mind?

Does your content address the questions each persona has during each step of the sales process? (For example, the questions they have when evaluating competitors or when researching implementation best practices.)

Finally, do you have this content available in the channels your buyer personas use to consume content? For example, that might include:

- Blogs
- Ebooks
- Videos
- Podcasts
- Twitter
- LinkedIn
Content marketing fails when it isn’t built with the right customer in mind. Make sure your content teams know the exact buyer personas they’re building for.

2. **Marketing Automation and Nurturing**

For leads and contacts that are interested in your products but aren’t ready to buy, do you have automated nurturing programs built for each persona?

Many teams have a standard, generic nurturing program they use for all leads. This is a good start, but nurture programs targeted to each buyer persona will give your potential buyers the information they need. And, in turn, will lead to a higher conversion rate.

Start by segmenting your leads based on their Industry, Job Title and other key criteria. Then, align those segments to the closest buyer persona. Finally, you should create different nurture programs for each persona.

Now, when someone asks to receive more information, they will receive a nurture program with content tailored to their questions and requirements.

3. **Advertising Campaigns / Media Buys**

Are your advertising teams targeting their media buys to your key buyer personas? Is the messaging and offer in each ad directly helpful to the target persona?
Many advertising teams simply buy media that looks like it will attract the most leads. Using our buyer personas, we know which buyers are involved in the research and evaluation phase. We also know what channels each persona uses to do their research. Your media buyers can then use that data to run campaigns on the ad networks that can reach those personas.

Furthermore, each ad campaign should be built with the following in mind:

• Which buyer personas uses that channel
• The information each persona is seeking
• How the offer within the ad helps the target persona

With buyer personas, your ad teams will be able to create a targeted strategy for their media buys.

4. Analytics

Now that your campaigns and content are targeted to personas, you can also layer buyer personas into your analytics.

• Which personas are visiting your website?
• Which personas are consuming each piece of content?
• Is the intended persona for each piece of content actually using it? Do you have gaps in content for each buyer persona?

• What’s your conversion rate? Does your content and product resonate better with certain personas?
• Do certain personas have a higher rate of abandoning your website without converting?

They key is to use buyer personas within your analytics to validate you’ve deployed the right campaigns and strategy. Most likely, you will have gaps where certain personas can’t find the right information or aren’t converting - and you’ll need to deploy new content and campaigns to fill those gaps.

5. Sales Process

Finally, does your sales team know the different people involved in the sales process? Do they have the right content and collateral ready? Do they know which personas are the budget owners, evaluators and influencers?

If everything your sales team does isn’t aligned with your buyer personas, then your marketing to sales close rates will suffer.

To start, make sure your team knows the following about your buyer personas:
• Which personas are involved in the buying process? At what stage do they typically get involved?
• What are their goals and objectives? What questions will they have? What data do they need?
• What collateral has your marketing team built for each persona? What content and collateral will each persona need? When should the collateral be sent?

Your sales team should have a playbook of your buyer personas, their involvement in the sales process, and how to provide them the exact information they need to make a sale.

Summary

As Peter Drucker famously said:

“The aim of marketing is to know and understand the customer so well the product or service fits him and sells itself.”

With buyer personas, it’s critical to not just know them, but to incorporate them into every campaigns, decision and conversation.
Next Steps

You now have a solid foundation in buyer personas. You understand what buyer personas are, how to create them and how to use them.

Ready to get started? Follow this plan to have your buyer personas up and running in the next 30 days:

1. Identify buyer personas using your CRM and by interviewing your sales team. (Day 5)

2. Interview 5 -10 people from each buyer persona. Summarize your findings to formulate your persona. (Day 20)

3. Educate your marketing and sales teams on each buyer persona and the key traits they should incorporate. (Day 30)