



# The buyer persona workbook.





## Digital marketing mastery.

Our Digital Marketing Mastery content is an initiative to share our knowledge and enable you to gain more traction with your customers. We know that the demand for expert digital marketing skills is growing and businesses like yours, need to ensure that they can keep up with the challenging pace that marketing technology poses.

The team at Engagement Factory are here to share with you our expertise gathered over years of experience on concepts such as email marketing, always-on campaigns and content marketing to take your digital marketing to the next level. With content ranging from detailed guides and formulas to 2-minute-tip videos designed to get results immediately, you're sure to find something useful for you. Each expert from Engagement Factory offers a range of insights, hints, methods and techniques that have been tried and tested. Large and small organisations across industries, countries, cultures and the world have found success with the approach and methods we're about to share with you.

So dive in, have fun and get started. A world of opportunity awaits you.

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## CHAPTER 1

# What are buyer personas?



# How beneficial are personas?

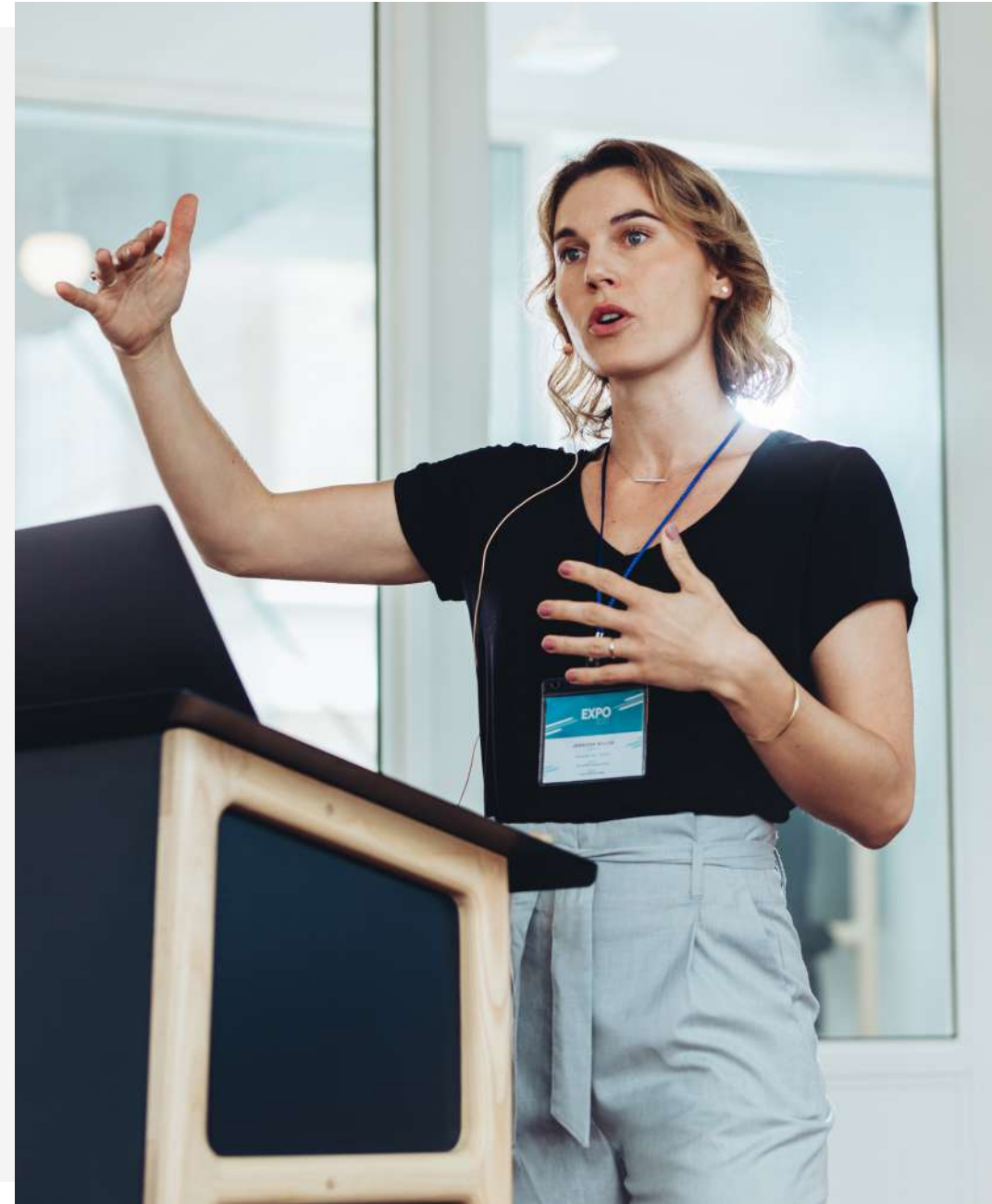
Buyer personas are semi-fictional representations of your ideal customer based off data and research.

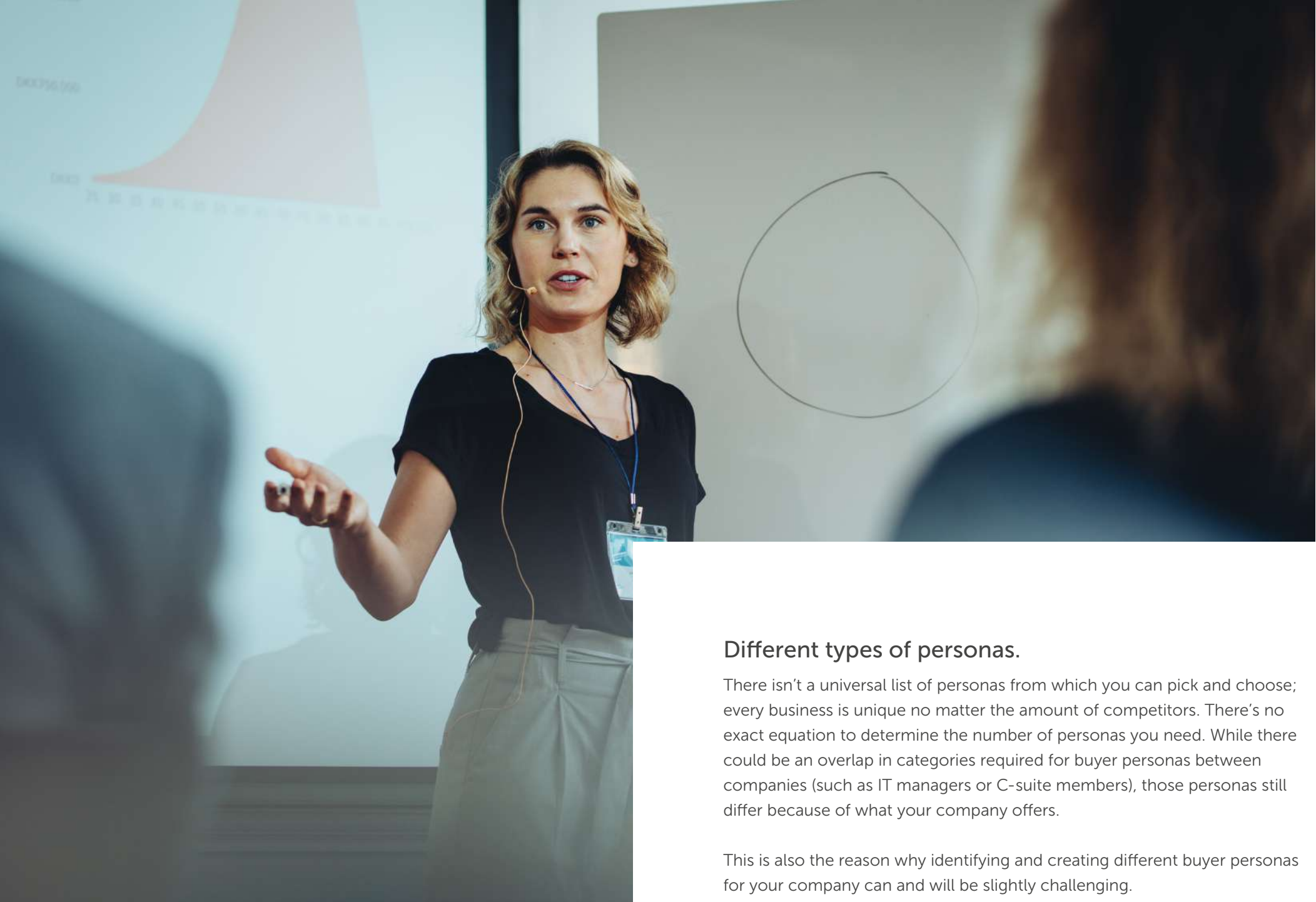
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Personas help you to align work across the organisation; from marketing to sales to service. Because you know the needs, behaviour and concerns of your prospects and customers you can also better allocate time and focus.

Using personas enables you to attract high-value visitors, leads and customers to your business. And it is more likely you retain them over time, because having a deep understanding of them is critical to drive product development, content creation and enable sales follow-ups. Basically anything that relates to customer acquisition and retention.

Base your personas on market research and actual insights of your customers – think about surveys, interviews and analytics – to make them really impactful. It could be that one persona is enough or you might need multiple to cover the complete spectrum of customers.





### Different types of personas.

There isn't a universal list of personas from which you can pick and choose; every business is unique no matter the amount of competitors. There's no exact equation to determine the number of personas you need. While there could be an overlap in categories required for buyer personas between companies (such as IT managers or C-suite members), those personas still differ because of what your company offers.

This is also the reason why identifying and creating different buyer personas for your company can and will be slightly challenging.



## How can you use personas?

At the most basic level, personas allow you to create content and messages that resonate well with your target audience. It also helps to target or personalize marketing for different segments of your audience.

For example, instead of sending the same lead nurturing emails to everyone in your database, you can segment by buyer persona and tailor your messaging to what you know about those different personas. It could be that you refine your message based on their preference, demographic and psychographics.

Secondly if you combine this with the buyer journey – how far they are within your sales cycle – personas allow you to map out and create highly targeted content for each stage of their journey.

Combine this with 'negative personas' – in case you have the time to create them – and you will also be able to filter out negative or exclusionary customers. This helps to achieve lower cost-per-lead and cost-per-customer. Being able to invest less into customers that won't convert will show higher sales productivity.



# Personas are the first step to a robust content strategy.

Because customers sit at the heart of a successful business.



## Buyer persona.

Personas provide insights such as key priorities, challenges or their role in the buying decision. They reveal the questions your target audience has at each stage of the buyer journey, and thus form the heart of a good content strategy.



## Content map.

In order to answer their questions during the buyer journey you need to provide content. By performing a content audit you identify content that can be repurposed and expose the gaps in your content map.



## Lead nurture workshop.

The last step is to create the actual nurture flows. Based on the persona and the required content for each stage of the buyer journey you can create the storyline and tailor the campaign brief with key messages to ensure conversion.



## CHAPTER 2

# How to create buyer personas?

# The methodology to create effective buyer personas.

In this section we will look at the necessary information you need to acquire, in order for a buyer persona to effectively influence the content strategy.

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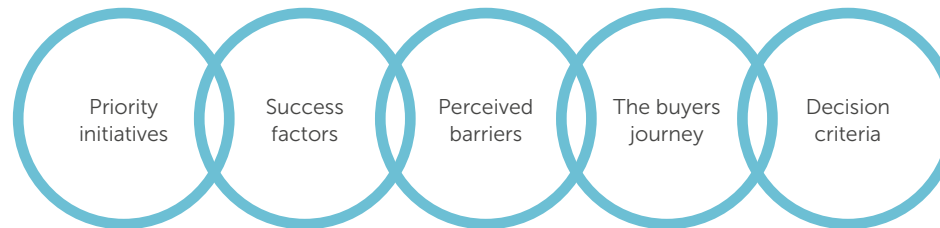
At Engagement Factory we develop personas using *The 5 rings of buyer insights*, a method created by Adele Revella, founder and president of the [Buyer Persona Insitute](#). This is our preferred method because the insights achieved by this level of research can truly set you apart from your competitors in the market.

In todays market it is not enough to know your buyer – if you want to influence your persona’s buying decision, you need to thoroughly understand the choices they make at every step in their journey.

To get this information, you actually need to talk to your prospects and customers using the 5 rings of buyer insights. Lets explore these rings a bit deeper.



## The 5 rings of buyer insights.



### **Priority initiatives:**

What drives and motivates them from a personal and business perspective to purchase.

### **Success factors:**

Positive results and outcomes your persona expects to achieve as a result of purchasing.

### **Perceived barriers:**

Attitude and obstacles that cause your persona to do nothing or choose your competitors.

### **The buyers journey:**

Which journey and actions they undertake from interest to advocacy phase.

### **Decision criteria:**

Which solution capabilities do they investigate that weigh in their decision to purchase.

## How to conduct the research.

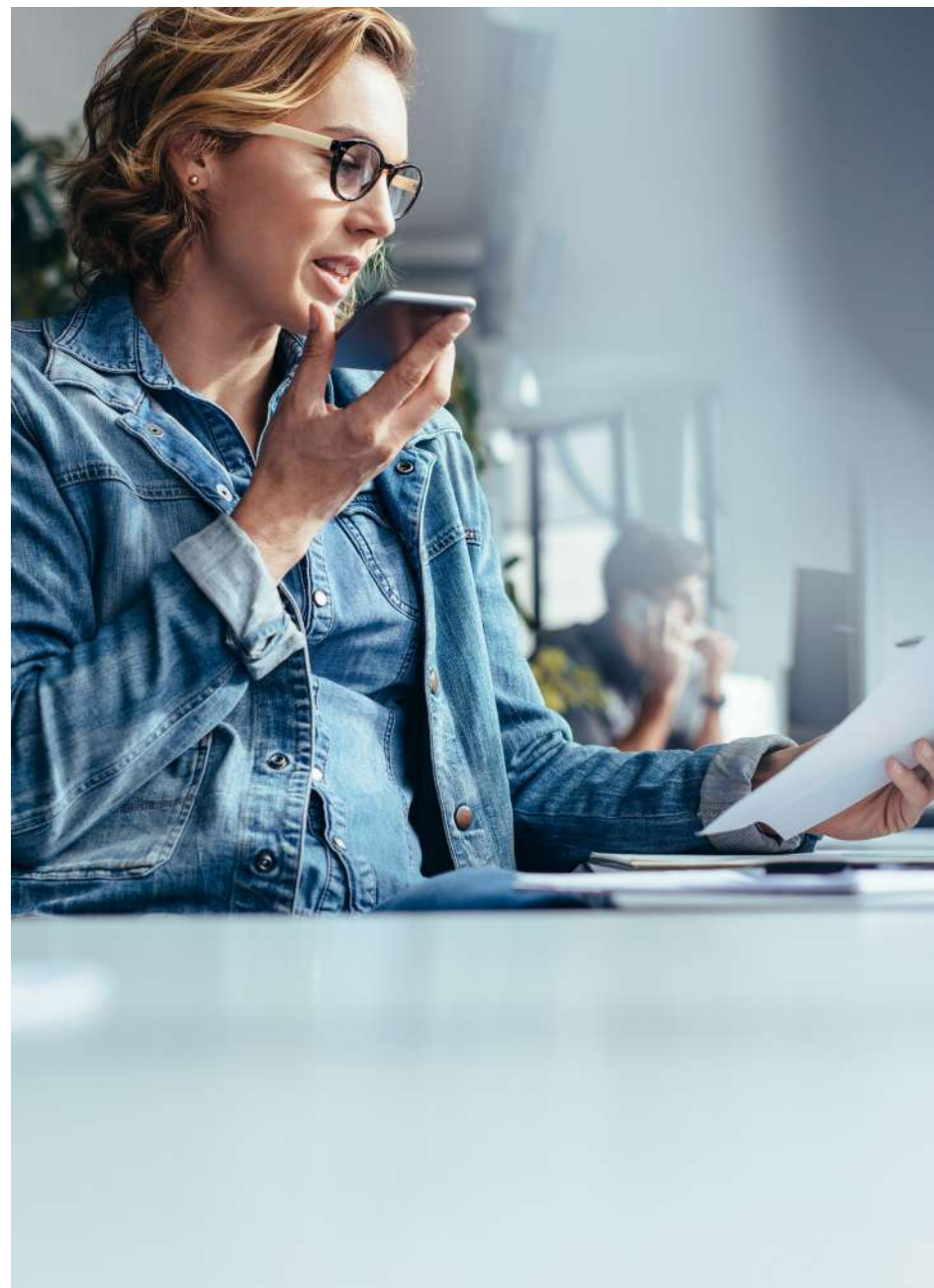
Personas are created through research, surveys and interviews. Part of this information can be sourced internally but a big chunk has to be gathered outside your organisation. Some practical methods you can implement to gather the information required to develop your persona could be:

**Internal alignment** – start by gathering insights within your company. Talk to marketing & sales and get feedback on how they interact the most with customers, what do they feel makes the difference for each type of customer you serve.

**Data capturing** – a second simple step would be to enhance the data you already capture. Personas for instance differ based on the company size, so include fields like this within your forms to capture data.

**Analyse** – look through your contact database and the data it provides. Uncover trends and how they transition from being a lead into an actual paying customer. Also analyse how they consume the content you present.

**Interviews** – the most valuable step is conducting interviews with prospects and customers to truly discover what they like about your product or service and how they navigate the buyer journey.







## Step 1 – Find the right contact.

Establishing the right people to speak with and find out, who your buyer persona(s) actually is / are. This is the most critical step in the process.

So it's time to conduct some interviews and there is no better place to start than with your existing customers. They purchased your product and have shown to be engaged with your brand, so they are able to exemplify your target persona(s). We will also some extra options.

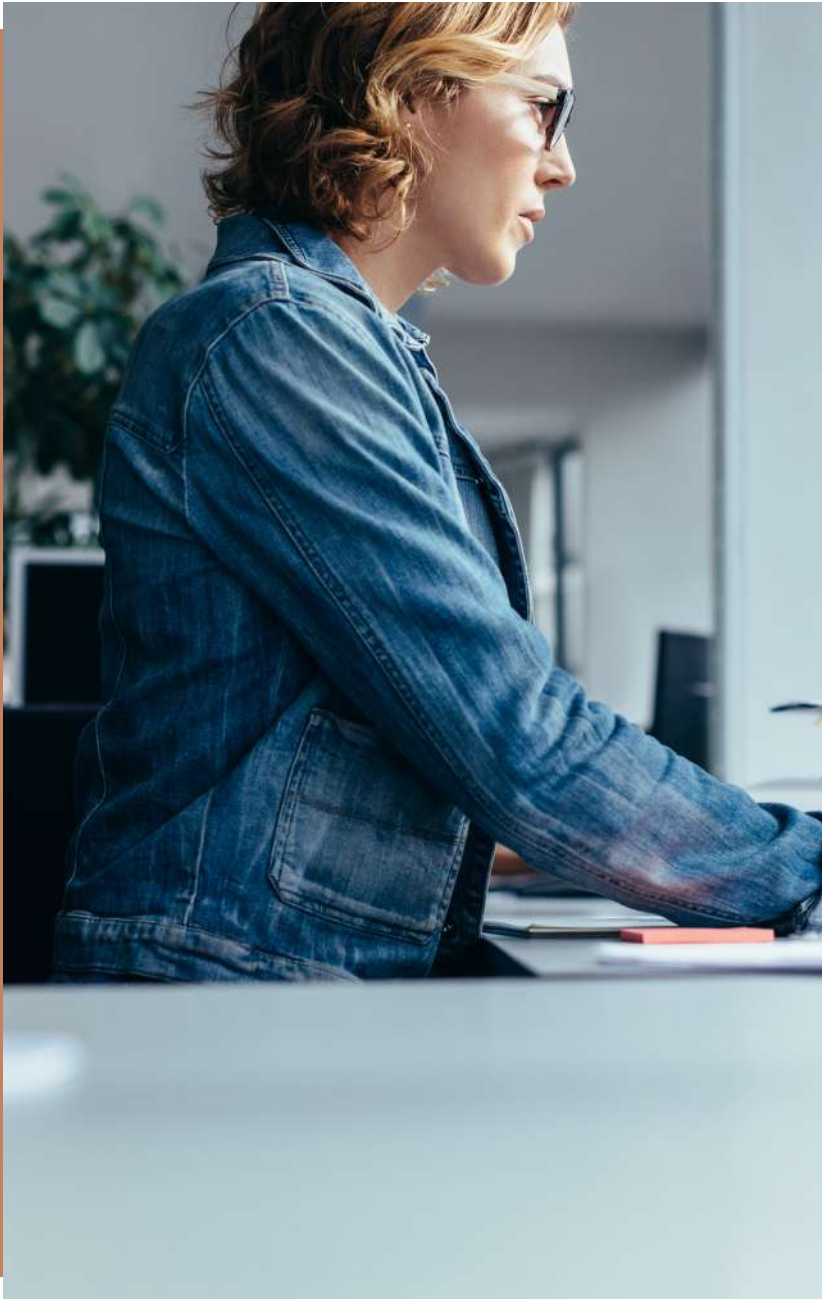
### **Current customers, your main source of information.**

Now that you know where to start, who should you be conducting interviews with from your current customer database? We recommend to not only talk to your most engaged customers but also those that are unhappy about your offering. This will help you to gain insights into the patters that will help solidify the understanding of your personas.

An example you could learn is that your product is too technical and difficult to use or that customers with a larger team lack a collaborative functionality within your product.

Conducting interviews with existing customers often require an incentive to capture their feedback. They care about the product or service and are willing to share if it will impact in a positive way. Just ensure you are clear about your goals when you reach out to them to request their feedback.





## Prospects, the secondary layer for interviews.

Ensure you also interview people that haven't yet committed to a purchase whom might not even know much about your brand or product. Your current prospects and leads are great, you already have contact details so this is your starting point to figure out who might fit into your target persona.

## Referrals, an added bonus.

Another option would be to use referrals to target personas. Use your network, social channels or even existing customers who can introduce you to potential referrals. Getting a larger volume might be hard but you will most likely get some great insights from the interviews.

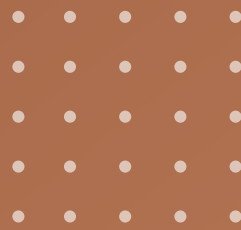
## Some extra tips.

**Incentives** – not all scenarios might require an incentive but to lower the barrier put something up as a reward for providing you with valuable information and to compensate them for their time such as a gift voucher.

**Be clear** – especially with non-customers you need to ensure the research is focused on learning from their input, you don't commit them into a sales call. You want to learn about them, their lives, jobs and challenges they face.

**Be flexible** – take care of your interviewee, suggest timeslot but be open to ensure you tailor yourself towards their needs. Cause you're the one getting something out of the interview and their time.

**How many interviews do you need?** – Start with at least three to five interviews. Once you are able to predict what your interviewee is going to say you probably have gathered sufficient input since you recognise the patterns.



## Step 2 – The interview.

Time has come to actually conduct the interview. Which questions should you be asking? How can you ensure the five rings of buyer insights get answered?

By giving you some guidance we hope to prevent a lot of staring at a blank screen trying to come up with effective questions to ask. Asking questions around the following topics will ensure you hit the mark:

- Personal background;
- Company background;
- Their role;
- Challenges faced;
- Goals to reach;
- How they gain information;
- Decision that lead to a purchase.

Let's explore these topics with a bit more detail.







## Personal background.

### Demographics

Starting with demographics forms the baseline and a personal picture of whom your talking to. Gather details like marital status, annual income, residence location, gender, age and more.

### Education

What level of education did they complete and which schools did they attend for those studies. The more specific the better.

### Career path

What journey did they undertake to get where they are today? Was their path rather traditional or did they switch from another industry?

## Company background.

### Company details

The basic details like industry, size, number of employees will help but try to get as many details as possible. This will guide you in creating relevant forms for your landing pages for instance.

### Service or product details

These questions don't directly relate to the department your interviewee works in. It is more about the type of service or product their company offers, and the benefits it provides? This helps to measure the impact it can have on the business.

Depending on the challenges your persona faces you might also want to learn about the differences of industries they might serve. For instance they deliver **packaging services** for **educational and medical** customers.



## Their role.

### Job role.

Let them describe the role and title. Are they an individual contributor, do they manage other people?

### To whom do you report? And who reports to you?

The importance of this question depends on the persona's job and seniority level but also to whom you're selling your product or service. Within a B2C company this information might help to better understand the personal life of the persona.

However within B2B this piece of information is more crucial. Is your persona within the manager layer or director level? How well versed are they in the intricacies of the industry? Consider the difference in information somebody with an introductory role needs in comparison to an actual decision maker.

### How is their job measured?

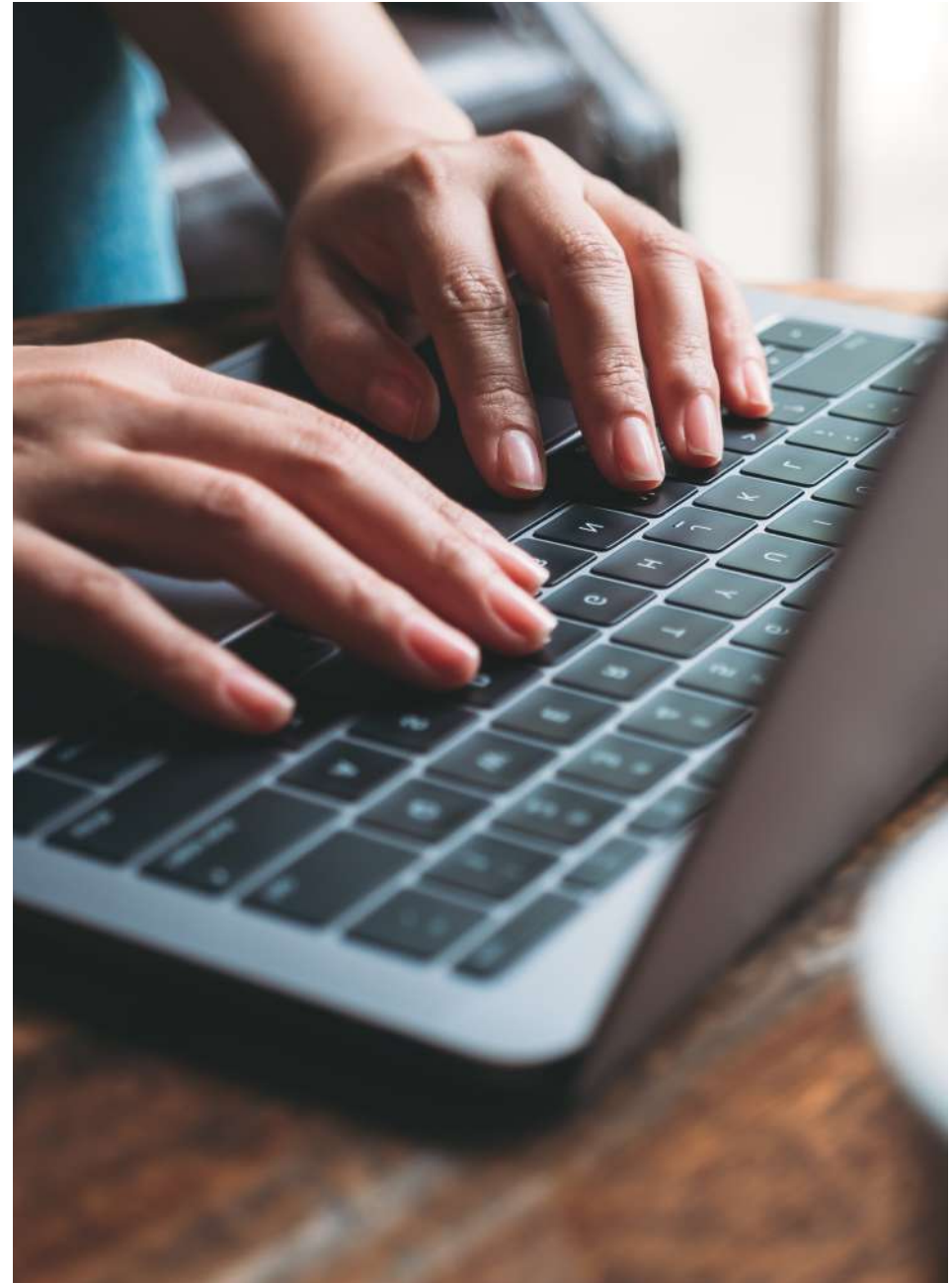
Which metrics fall to the responsibility of your persona? This helps you to determine their success factors and the challenges they face.

### Day description.

Have them explain how a normal day looks, when does it start and end. How does a busy day look like? Have them include the tasks they perform and explain their work life balance. Use this bridge to also learn a bit more about their personal life. What do they do for fun? What kind of car do they drive? Who is the most important person in their life, just get personal.

### Skills, knowledge and tools.

What are the ideal skills for their job, how good are they at these tasks, and how did they learn them? Which tools and applications do they use? What do they hate or love about them? This helps to identify commonalities.





## Challenges faced.

### **Business struggles.**

You can be in business with this person if you can help to solve one of their problems. So what is affecting them in their day-to-day life? Have them explain the details and nuances that illustrate how it makes them feel.

Dig deep to find the pain points and what intimidates them. How do they personally feel they can overcome these challenges or what would help them to overcome these struggles?

Also come up with real quotes to refer to these challenges. Because these can be used to further complete the buyer persona and make it feel realistic.

## Goals to reach.

### **Achieving success.**

Going beyond known metrics they are measured on. What are the primary and secondary goals in their work? How can you help your persona stand out?

Companies that take the time to understand their personas and what makes them successful also experience more effective communication between the marketing and sales department.

## How they gain information.

### How do they learn about new information related to their job?

Knowing how your persona consumes information is important if you wish to market and sell to them. Do they go online or prefer to learn in-person? Do they read magazines and newspapers? Which sources do they trust the most?

### Which social networks do they use?

Marketing on social media can be really powerful but investing time and money in the correct resources is key. Identify the associations and social networks on which they spend time, learn where to engage in conversations.

## 'Shopping' preferences.

### Preferred interactions with vendors.

Aligning the purchasing experience with that of your personas expectations can make the difference. How should the sales experience feel? How much time do they expect to spend with sales? Do they anticipate to meet in person or rather conduct the process online or over the phone?

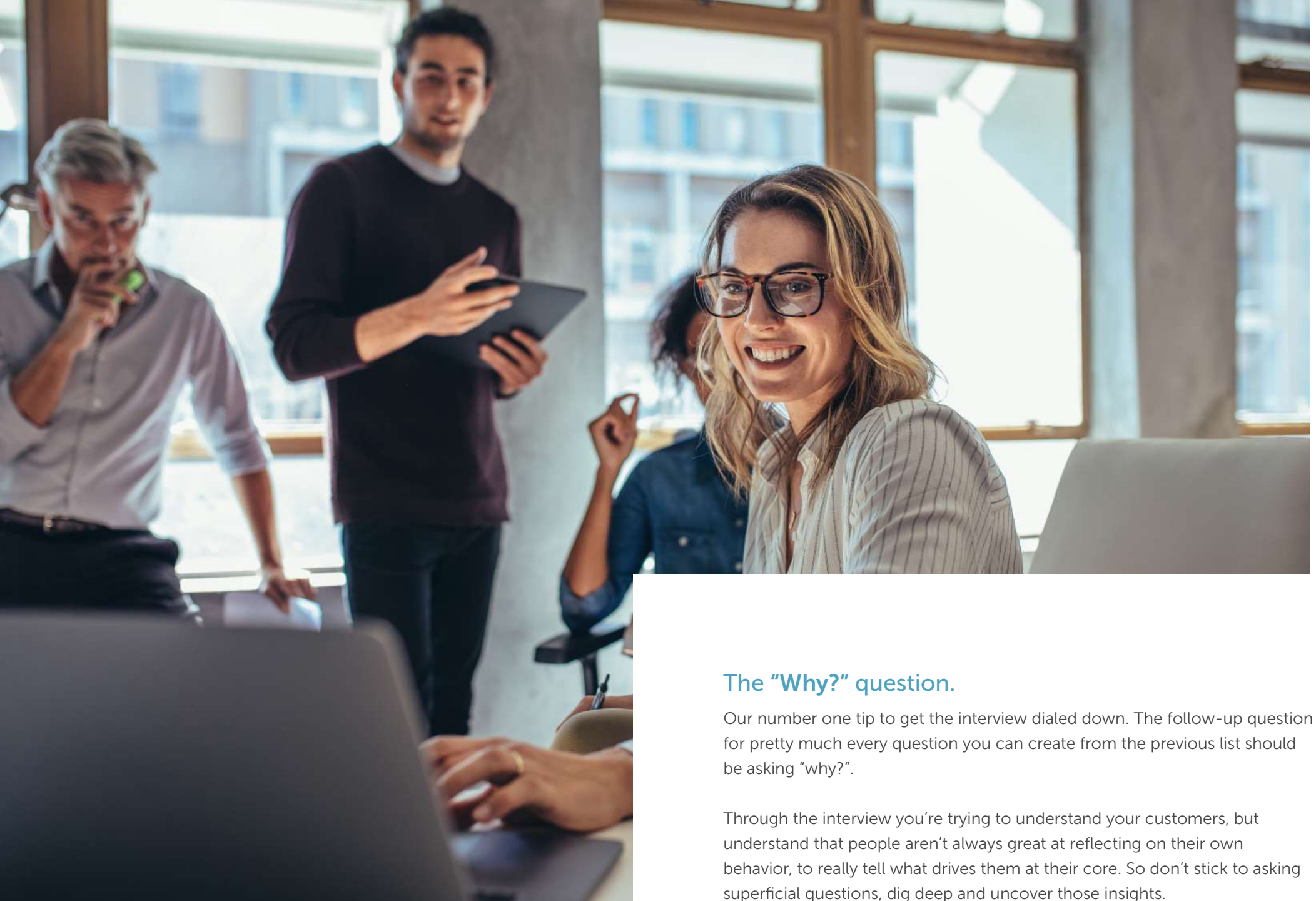
### Describe purchase.

Why did they consider a purchase? What was the evaluation process like? How did they decide to purchase the product or service? Was it the first time they purchased or did they switch products or services?

Just as with some of the previous questions, don't only focus on the positive. Negative experiences can contribute just as much. Learning to anticipate objections or being able to steer away from barriers and fear ensure your marketing and sales process has more chance to succeed.







### The “Why?” question.

Our number one tip to get the interview dialed down. The follow-up question for pretty much every question you can create from the previous list should be asking “why?”.

Through the interview you’re trying to understand your customers, but understand that people aren’t always great at reflecting on their own behavior, to really tell what drives them at their core. So don’t stick to asking superficial questions, dig deep and uncover those insights.





## Step 3 – Process data.

After completing the internal research and conducting the external interviews you should now have a lot of raw data about your potential customers.

The next step involves identifying patterns and commonalities. If you could predict answers during your last interview sessions, that would show the process already started in your head. Time to put it on paper and make it easy to understand for others.

For example, split down the demographics data into charts to find the commonalities in gender, age, income etc. Can you see patterns within their education? Do all companies show similar business struggles?

The research and interviews helped to establish who your buyer persona is, the second part is to learn how to identify them when you encounter one another. The following pages include our framework which can be used as an exercise to summarize and give a face to all that data.



# Meet [persona name]

[Job title]

**Description**

[Write a small introduction for the persona, include demographical details such as personal and company related.]

- [Key identification details]
- [Key identification details]
- [Key identification details]

**Age:** [Age]

**Direct report:** [Who reports to our persona?]

**Reports to:** [Pesona reports to?]

**Role:** [Can your persona influence or make decisions?]

**Decision making:**



Find an image that represent your persona.

# Priority initiatives.

Explain what drives and motivates them from a personal and business perspective?

## Description

[We normally include a small mixture of descriptive text in combination with bullet points to quickly clarify the topic.]

*[Include a relevant quote per section. Think about their tonality and how they voice themselves. Maximum of 3 lines, ensure relevancy and keep it as short as possible.]*



If possible show your persona in different situations.

# Success factors.

Explain what operational or personal results your persona expects to achieve by purchasing the solution?

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## Description

[We normally include a small mixture of descriptive text in combination with bullet points to quickly clarify the topic.]

*[Include a relevant quote per section. Think about their tonality and how they voice themselves. Maximum of 3 lines, ensure relevancy and keep it as short as possible.]*



If possible show your persona in different situations.



# Perceived challenges.

What challenges might keep your persona away from choosing your product or solution?

## Description

[We normally include a small mixture of descriptive text in combination with bullet points to quickly clarify the topic.]

*[Include a relevant quote per section. Think about their tonality and how they voice themselves. Maximum of 3 lines, ensure relevancy and keep it as short as possible.]*



If possible show your persona in different situations.

# Perceived barriers.

What concerns cause your persona to believe your solution or company is not the best option? Do they have any pre-conceived notions of your product?

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## Description

[We normally include a small mixture of descriptive text in combination with bullet points to quickly clarify the topic.]

*[Include a relevant quote per section. Think about their tonality and how they voice themselves. Maximum of 3 lines, ensure relevancy and keep it as short as possible.]*



If possible show your persona in different situations.

# Decision criteria.

Which aspects of the competing products, services, solutions or companies does your buyer perceive as most critical, and what are their expectations for each?

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## Description

[We normally include a small mixture of descriptive text in combination with bullet points to quickly clarify the topic.]

*[Include a relevant quote per section. Think about their tonality and how they voice themselves. Maximum of 3 lines, ensure relevancy and keep it as short as possible.]*



If possible show your persona in different situations.

# Main information sources.

Which information sources are consulted at each stage of the buying cycle? And which format is preferred?

## Description

[We normally include a small mixture of descriptive text in combination with bullet points to quickly clarify the topic.]

*[Include a relevant quote per section. Think about their tonality and how they voice themselves. Maximum of 3 lines, ensure relevancy and keep it as short as possible.]*



If possible show your persona in different situations.



# Buying process & stakeholders.

Explain the stages of their buying cycle and whom might be involved in the Decision Making Unit (DMU).

## Description

[We normally include a small mixture of descriptive text in combination with bullet points to quickly clarify the topic.]

*[Include a relevant quote per section. Think about their tonality and how they voice themselves. Maximum of 3 lines, ensure relevancy and keep it as short as possible.]*



If possible show your persona in different situations.

# Additional insights.

Any additional insights that you may have uncovered during your research can be noted here.

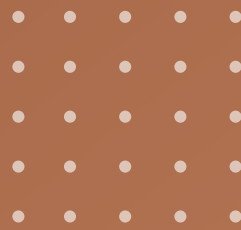
## Description

[We normally include a small mixture of descriptive text in combination with bullet points to quickly clarify the topic.]

*[Include a relevant quote per section. Think about their tonality and how they voice themselves. Maximum of 3 lines, ensure relevancy and keep it as short as possible.]*



If possible show your persona in different situations.



## Step 4 – The buyers journey.

Now that you have an intimate understanding of your buyer persona it's time to map out the questions they have at each stage of the buyers journey.

The buyer journey describes the process buyers go through to become **aware** of their problem, how they **consider** and evaluate options and eventually **decide** to purchase. This journey is mapped out across the following 5 stages:

### 1. Interest

They become aware of their problem and decide if it will be a priority.

### 2. Learn

Committed to the problem it is now time to find a proper solution.

### 3. Evaluate

Knowing how to fix the problem leads to the question, which solution is best?

### 4. Justify

How can they justify the decision?

### 5. Purchase

What are the last steps necessary to get started?

The following framework exercise allows you to provide answers to the questions your persona faces at each stage of the journey.





# The buyers journey. <sup>1/3</sup>

What is your personas *motivation* at each stage?

Interest	Learn	Evaluate	Justify	Purchase
<p><b>Interest, motivation 1:</b> [Place description here.]</p>	<p><b>Learn, motivation 1:</b> [Place description here.]</p>	<p><b>Evaluate, motivation 1:</b> [Place description here.]</p>	<p><b>Justify, motivation 1:</b> [Place description here.]</p>	<p><b>Purchase, motivation 1:</b> [Place description here.]</p>

# The buyers journey. <sup>2/3</sup>

What are your personas *questions* at each stage?

Interest	Learn	Evaluate	Justify	Purchase
<div>Interest, question 1: [Place description here.]</div>	<div>Learn, question 1: [Place description here.]</div>	<div>Evaluate, question 1: [Place description here.]</div>	<div>Justify, question 1: [Place description here.]</div>	<div>Purchase, question 1: [Place description here.]</div>

# The buyers journey. 3/3

What is your personas *consulted content* at each stage?

Interest	Learn	Evaluate	Justify	Purchase
<div>Interest, content 1: [Place description here.]</div>	<div>Learn, content 1: [Place description here.]</div>	<div>Evaluate, content 1: [Place description here.]</div>	<div>Justify, content 1: [Place description here.]</div>	<div>Purchase, content 1: [Place description here.]</div>





## Step 5 – A persona poster.

An effective way to ensure personas are consulted for product development, content creation or sales calls is to ensure they are visually present. Like a poster!

Putting your buyer personas onto a poster ensures everybody within the company can understand your target customers on a deeper level, everyone on your team knows how to best target, support, and work with your customers and that this information is always visually present.

This will help you improve reach, boost conversions, and increase loyalty.



We are Engagement Factory, a customer engagement agency to the core. Driven to help our clients transform into a customer-centric business, we do so by combining strategy and insights, fuelled by creativity and technology. By delivering compelling experiences throughout the customer journey, we enable our clients to build long-lasting customer relationships. From our main base in the vibrant heart of Europe's tech hub, the Netherlands, we operate across the globe. Our international team empowers local support, from Sweden to South Africa – and everywhere in between.

Head quarters: Eindhoven, The Netherlands  
Regional offices: Cape town (South Africa), Dubai (United Arab Emirates),  
Stockholm (Sweden), Londen (United Kingdom)

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