



**SARAH BEST
STRATEGY**



HOW TO CREATE CUSTOMER PERSONAS FOR YOUR BUSINESS

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About SBS

WHO ARE WE?

We are an award-winning digital agency that empowers companies and organizations to **shine in the digital space**, so that they can better achieve their mission and goals.

We do this by:

- Helping teams get stronger at their marketing
- Extending the bandwidth of busy teams



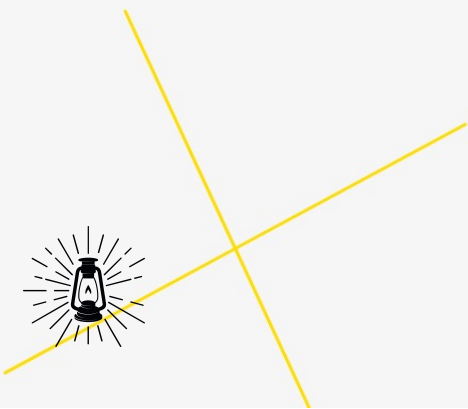
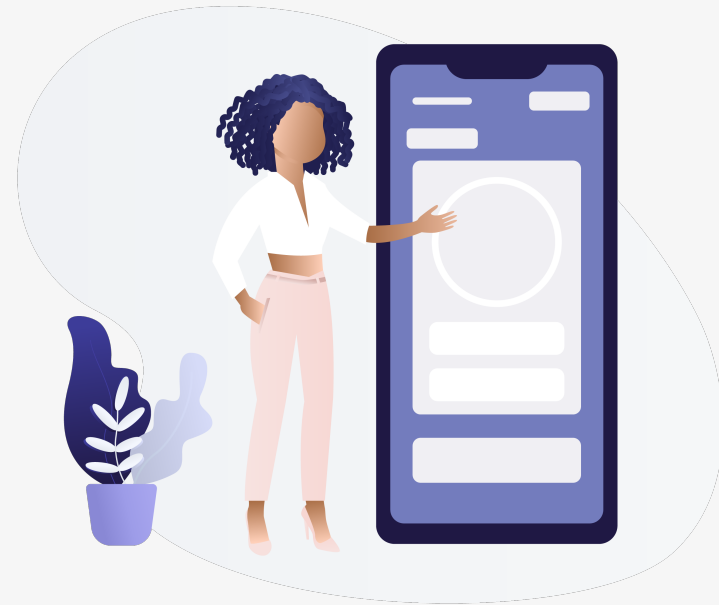
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what are customer personas?

- Buyer personas are **fictional**, **generalized representations** of your ideal customers.



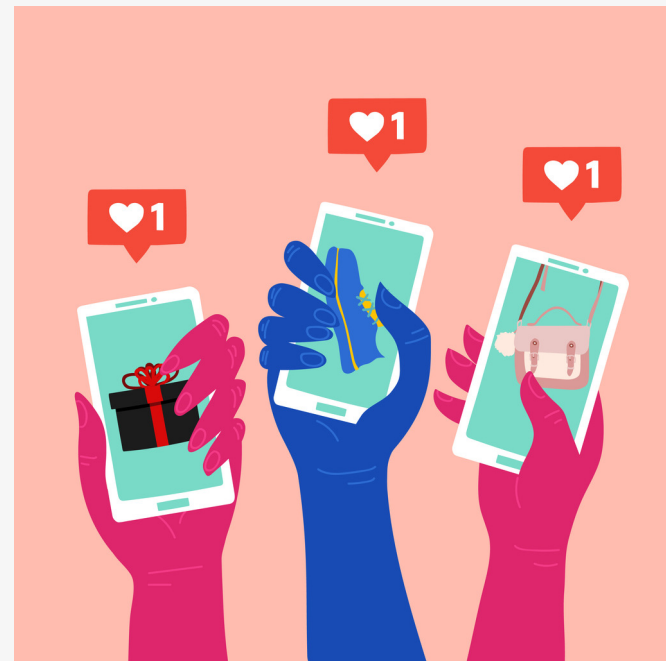
what are customer personas?

- They help you understand your customers (and prospective customers) better, and make it easier for you to tailor content to the specific needs, behaviors, and concerns of different groups.



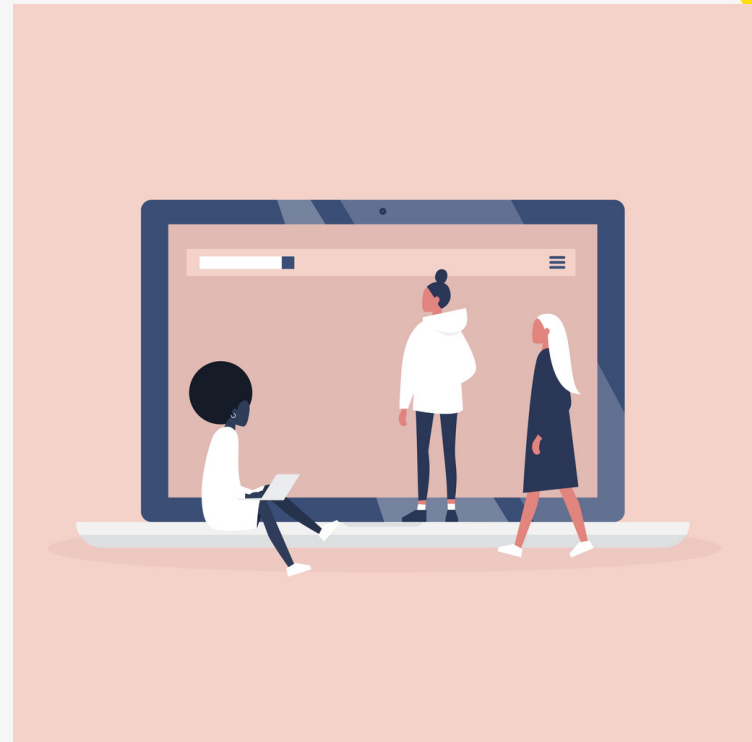
what are customer personas?

- The strongest buyer personas are based on **market research** as well as on insights you gather from your actual customer base (through surveys, interviews, etc.).



what are customer personas?

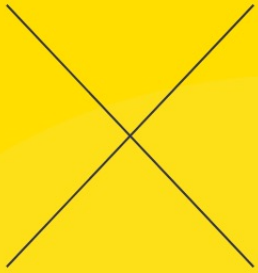
- Depending on your business, you could have as few as one or two personas, or as many as 10 or 20.
- **Tip:** If you're new to personas, start small! You can always develop more personas later.



how can you use personas?

At the most basic level, personas allow you to personalize or target your marketing for different segments of your audience.



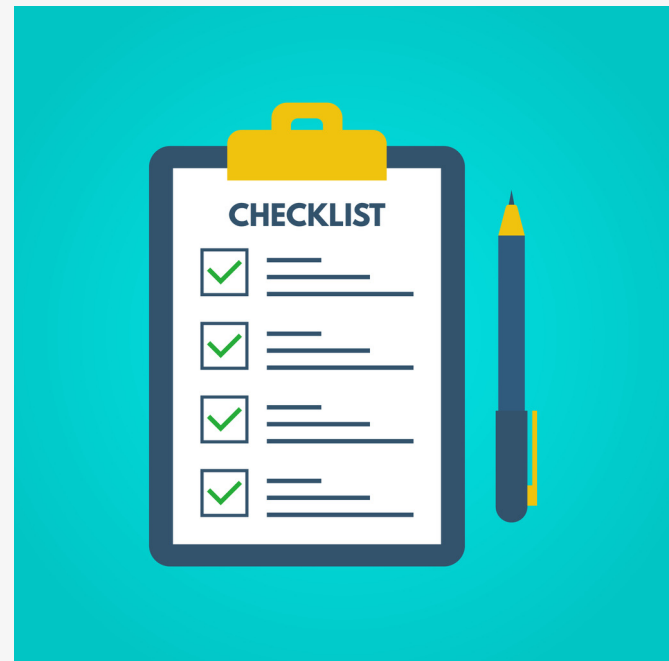


For example, instead of sending the same lead emails to everyone in your database, you can segment by buyer persona and tailor your messaging according to what you know about those different personas.



how do you create personas?

- Buyer personas are created through **research, surveys, and interviews** of your target audience. That includes a mix of customers, prospects, and those outside of your contact database who might align with your target audience.



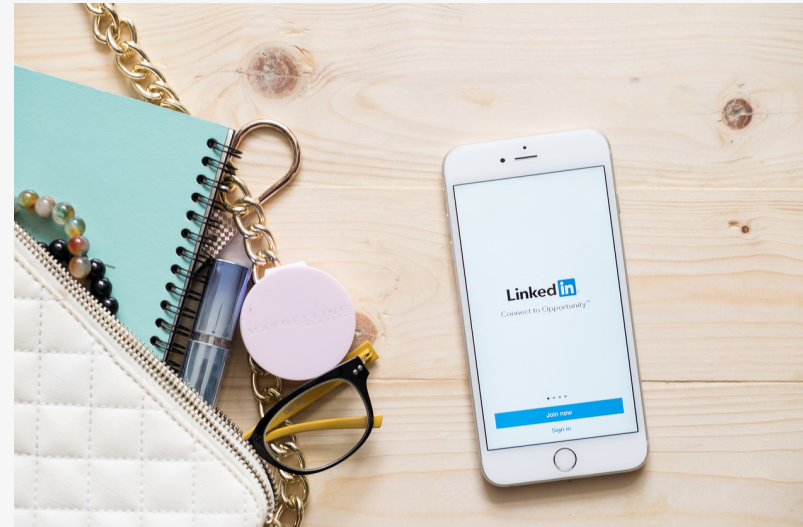
how do you create personas?

- Here are some practical methods for gathering the information you need to develop personas:
 - **Interview customers** either in person or over the phone to discover what they like about your product or service. (You can also hire us to interview your customers for you).



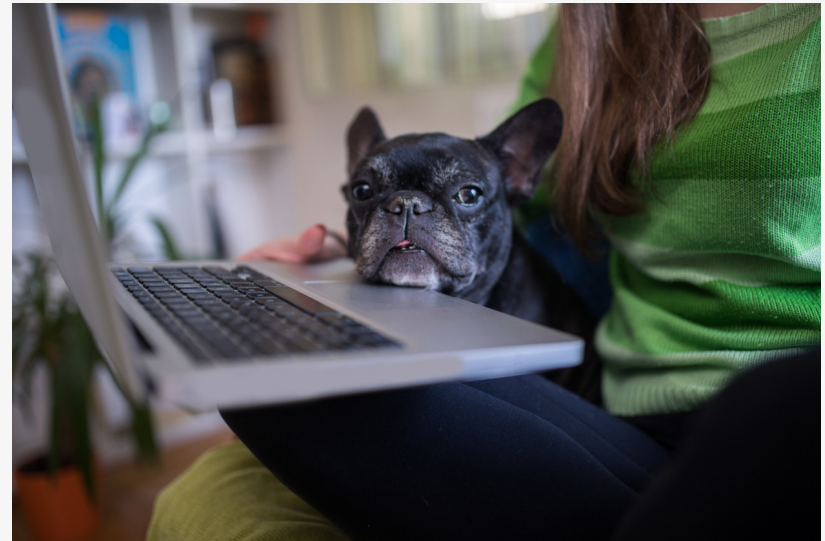
how do you create personas?

- Look through your **contacts database** to uncover trends about how certain leads or customers find and consume your content.
- Look at the **LinkedIn profiles** of 10 or more of your ideal customers (or hire us to do this analysis); look for things your contacts have in common, such as education and skills.



how do you create personas?

- When creating forms to use on your website, use **form fields** that capture important persona information.
- For example, if all of your personas vary based on company size, ask each lead for information about company size on your forms.
- You could also gather information on what forms of social media your leads use by asking a question about social media accounts.



how do you create personas?

- Take into consideration your **sales or fundraising team's feedback** on the leads they are interacting with most. (What types of sales or donations cycles does your sales team or fundraising team work with? What generalizations can they make about the different types of customers you serve best?)



how do you create personas?

- **HubSpot customers:** You can create and manage your personas within the Contacts tool. Head to <https://bit.ly/SBSPersonas> to learn more.
- **Customers and non-customers alike:** You can use the following writing prompts to organize your persona data.
- First, we'll walk you through an example, then we'll leave you with writing prompts so that you can get to it!

A screenshot of the HubSpot 'Create Persona' interface. The window title is 'Create Persona' with a close button in the top right. The main heading is 'Select persona picture and name' with 'Step 1 of 4' on the right. Below this is a sub-heading 'Choose a picture for your persona' and a grid of nine placeholder images. One image in the bottom row is selected with a black border. To the right of the grid is a button labeled 'Upload your own photo'. Below the grid is a text input field with the label 'What do you call this persona? (Required)' and the text 'Teacher Ted'. At the bottom are two buttons: 'Previous step' and 'Next step', with a black arrow pointing to the 'Next step' button.

VICTORIA

- Head of human resources
- Worked her way up at the same company
- Married with two kids (10 and 8)

01



DEMOGRAPHICS

- Skews Female
- Age 30-45
- Dual HH income: \$100,000
- Suburban

02

IDENTIFIERS

- Calm demeanor
- Probably has an assistant screening calls
- Asks to receive collateral material in the mail



03

▶ GOALS

- Keep employees happy
- Improve employee retention
- Support legal and finance teams

04

PAIN POINTS

- Getting everything done with small staff
- Rolling out changes to entire company

05

WHAT WE CAN DO FOR HER

- Make it easy to manage all employee data in one place
- Integrate with legal and finance team's systems

06

REAL QUOTES

- "It's been difficult getting company-wide adoption of new technologies in the past"
- "I don't have time to train new employees on a million databases and platforms"

07

▶ REAL QUOTES CON'T

- "I've had to deal with so many painful integrations with other departments' databases and software"

07



09

our solution


- Integrated HR Database management





10

our elevator pitch

- We give you an intuitive database that integrates with your existing software and platforms and lifetime training to get new employees up to speed quickly
- 

your turn!



- We've provided writing prompts that you can use to develop your own persona.
- Feeling stuck? We also offer guided **Messaging for Target Audiences** sessions with an expert strategist and copywriter.



customer persona writing prompts



BACKGROUND

01

- Name
- Job
- Career Path
- Family Life

DEMOGRAPHICS

02

- Gender or gender identity
- Age
- Income
- Location

IDENTIFIERS

03

- Personality traits
- Intrests in or outside of work
- Communications Preferences
- How do they get info?

GOALS

04

- Primary Goal
- Secondary Goal

PAIN POINTS AND POSITIVE OUTCOMES

05

- Challenge #1
- Challenge #2
- What does a really good day look like for them?

PAIN RELIEVERS AND GAIN CREATORS

06

- What we can do #1
- What we can do #2
- What we can do #3

REAL QUOTES

07

- "Quote One"
- "Quote Two"

COMMON OBJECTIONS

08

- Why won't they buy your product / service?





09

**how would you
describe your solution
to this persona?**

- Statement





10

Elevator Pitch: Sell Your Persona on the Solution!

- Statement
- 

Like what you read?

- Unleash in-house teams and talent through audits of digital marketing programs, strategy, and training
- Extend the bandwidth of your team with social media management, email marketing, inbound marketing, search engine optimization, and advertising

Contact us: sarah@sarahbeststrategy.com to set up a free 30-minute exploratory call.



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Thank You

QUESTIONS?



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