

Persona Development Worksheet for Business Inbound Marketing

A persona is a fictional composite of your existing (or ideal) customer's characteristics that represents a segment of your customers. It might also represent a market segment you intend to target. Sometimes called avatars, they are basically a generalized archetype that represents your targeted customers.

These personas can serve as the foundation for all of the content you will develop for your inbound marketing efforts. Your personas can include key demographics, background information, observed behavior patterns, goals, values, skills, attitudes, and generalities regarding the communication needs and preferences of your ideal customer. Personas help you provide relevant communication and content to improve the way you reach and interact with them during each stage of the buyer's journey.

Advantages of persona development

The purpose of developing a persona for your targeted customers is to understand your ideal customer. The goal is to apply a customer-centered mindset to your marketing and communication efforts. Understanding their needs, wants, values, challenges, and goals will help you tailor your messages and provide them with solutions, answers, and choices. This information lets you more effectively target your specific audience in your marketing efforts.

How do you create your customer personas?

Use any or all of the following strategies to gather information to develop your customer personas:

- Interview current customers to find out what they like about your school.
- Conduct your own online research.
- Talk to your employees and contractors to get their feedback on the leads or jobs they are reacting with most often. What information can they provide about the customers you best serve?
- Review your marketing processes to discover what questions your prospective customers ask most often and what goals they want to accomplish.
- Use your website forms to gather the data that will help you understand your prospective customers' needs. You can also use your social media channels to ask questions and post quizzes and surveys to gain valuable information.

- Review your social media channels to discover what posts are the most popular and shared and engaged with as a guide about what content might be most valued by prospective customers.

STEP 1: Who is your ideal audience?

Make a list of the various types of ideal customers you are hoping to attract in your inbound marketing efforts. If you are just beginning an inbound marketing effort for your business, don't worry about communicating with every possible prospective customer. In fact, we recommend keeping your initial persona list to no more than two or three personas; any more than that, and it can be hard to manage large inbound campaigns when starting out.

The personas you develop can and should be highly customized. If you are an engineering consulting firm, you will ask very different questions to flesh out your personas than a tax accounting firm. This applies to any service firm. You need to understand what your persona's needs are, what problems they seek to solve, and what goals they want to achieve. Basically, you want to know what job they would hire you to do. Or, maybe you need to know why they are firing their current service provider to understand their dissatisfaction (which you will then address through your marketing efforts).

STEP 2: What to include

We recommend that you start by creating personas for your two or three best-match or targeted customers. Too many to start with will be unwieldy; you can always create additional personas as needed.

Define your demographics. Include (approximate or average) age, gender, education, household income, socioeconomic background, etc. You won't use all the categories of demographics all the time. For example, you might include information like location or income brackets.

Describe their values, goals, and frustrations. Understanding what your audience values with regard to your service and products and their goals for themselves will be important for your communication tactics and objectives. In this category, include your persona's pain points as well. A "pain point" is a problem or frustration your persona experiences or perceives in relation to your product or service. Your persona isn't much different from you or someone you know; use empathy to understand the things your persona wants and values.

Here are a few questions to help you brainstorm possible **persona needs and concerns**:

- What does your persona need that is driving them to consider you?
- What types of concerns of your persona?
- What are your persona's interests?
- What are they passionate about?
- What are their goals?

- What makes your persona happy?
- What will your persona want to avoid?
- What makes your persona frustrated?

Articulate your persona's communication preferences and needs. This kind of information can be gathered in surveys from past customers or through market research data. You may need to use several mediums (social media, email, and mailers). You can also learn some of this from general research that has already been completed. Here are a few brainstorming questions to discover your persona's communication preferences:

- What kind of information does your persona need to know?
- What will motivate your persona to engage with your communication?
- What does your persona want to know?
- How does your persona want to receive communication from you?
- What media forms does your persona use to get information? Where do they get their news?
- Where do they look for entertainment?
- What are their social media preferences?
- What is your persona's literacy level?
- What is their primary language?

To create a useful buyer persona it is important that you gather the right data. You'll develop the strongest personas from the insights you learn from your existing customer base. Combine that data with what you get from other sources, and you will have a powerful resource. Use the following approaches to collect insights from your targeted customers:

- **Talk to your customers:** Your customer interview should include questions about their values, goals, problems, and decision-making. Conduct these in person or over the phone. Include both good and bad customers (unhappy customers will be a good source of insight). If your customer has a hard time answering some questions, help them drill down by asking a series of "whys" to get to the deeper answers.
- **Set up a survey to gather data:** Create an online survey, and send it to customers within your targeted persona group. Keep it short and simple, or people won't complete your survey. Ask a combination of quantitative and open-ended questions.
- **Review your website analytics:** Your website analytics can provide you with information about your typical website visitors. Where did they come from? What keywords did they use in their search? What devices do they use? What types of information, like ads, do they respond to?
- **Research social media:** Look at your social media insights, and check out your most active followers on each of your social media channels. If you don't have existing social media channels, check out the followers of a close competitor.

- **Conduct interviews** with staff who interact with targeted customers (contractors, receptionists, customer service): Those who talk with your customers regularly may be a good source of their worries, interests, and goals.

STEP 3: Personalize your persona

The final step is to give your persona a face and a name. This step isn't required, but it does help to personalize your persona, particularly for those developing content. It helps to use a name that includes an adjective that describes their personality, role, or key interests. For example, "Indy-Inventor Iris," "Patent-Seeking Paul," or "Investment-Property Owner Isaac."

Using your persona

Once you have your personas, use them! Ask yourself questions like,

- "What can we do to build trust with this person?"
- "What call to actions will appeal to them?"
- "Does our website meet their needs?"
- "Would Indy-Inventor Iris relate to this information?"
- "Did this video make Patent-Seeking Paul excited about having his product engineered?"

Use your personas to help create content to meet your objectives, which include communicating, educating, and engaging prospective customers. When thoughtfully created, you will understand what to communicate, where to communicate, and how to communicate.

Sample Personas

Now it's time for you to get to work. Personas can be as unique as your business, and there's no one way to create your personas. OptinMonster has a list of [persona examples](#) that can help you get started.