

# Personas: Overview

Personas are unique groups of people who have similar wants and needs as it relates to your product/service. By identifying these "personas" we do a better job of targeting our communication for each group with messages and content that are relevant to each for greater marketing impact. This worksheet guides you through creating personas.

## Sam Smith



### DESCRIPTIVE

- Manager of Operations at ABC Company for 12 years. Career of 20 years in Operations. Income \$112k.
- Married high school sweetheart. 2 kids (8 & 15). Lives in Cordova, TN.

### PERSONALITY

- Type A at work. Laid back at home.
- Avid basketball player.

### TRIGGER

- Recent economic crash has prompted Sam to look for better life-insurance for his family.

### QUESTIONS/EMOTIONS

- What insurance options are available to keep my family financially secure?
- Is the financial organization strong and durable? (e.g. won't crash with the market)
- My wife doesn't work, so I'm afraid if I'm not here, she won't be able to make ends meet.

“ It's my job to protect my family and preserve my financial legacy. I'm looking for an organization to partner with me in finding the right insurance solution.

## Use these elements to guide your research

### DESCRIPTIVE ELEMENTS:

- Job Title
- Career Path - steps take to get to current role.
- Married?
- Kids? How many?
- If possible, get an actual picture of the persona you are describing and give them a name

### DEMOGRAPHICS:

- Gender
- Age
- Income

### PERSONALITY:

- Demeanor (calm, intense, competitive)
- Communication preferences (email, phone, mail, text, social media, via assistant)

### TRIGGERS:

- What are some things that cause your prospects to start searching something like your product/service?

### WHAT are prospects looking for?

- Problems/challenges
- Pain points

### RESEARCH: What questions are they asking?

- When they start searching for a solution to their problem?
- As they learn more about your service and start to understand their needs and what you offer?
- When comparing you to competitors?
- Before making a final buying decision?
- What words and phrases do people use when searching for your product/service online?

### WHY are they concerned about a purchase? (*Buying OBJECTIONS*)

### What EMOTIONS might your prospects be feeling?

- Are they nervous about it not working, the high cost, etc.?

### WHY are they looking? (*Buying MOTIVATIONS*)

- Include quotes from prospects

# Personas: Worksheet

Now it's your turn! Begin by listing out the different types of customers you currently have (or plan to have). Think about how people use your product and service and what causes them to choose you over your competitor. You can distinguish your audiences based on job title, role in the buying process, how they use your product/service, the importance of specific features. Use the overview page elements to guide your research.

<b>Name:</b>	<b>Name:</b>	<b>Name:</b>
attach picture that represents your persona here	attach picture that represents your persona here	attach picture that represents your persona here
DESCRIPTIVE	DESCRIPTIVE	DESCRIPTIVE
PERSONALITY	PERSONALITY	PERSONALITY
TRIGGER (S)	TRIGGER (S)	TRIGGER (S)
QUESTIONS/EMOTIONS	QUESTIONS/EMOTIONS	QUESTIONS/EMOTIONS
QUOTE: “	QUOTE: “	QUOTE: “