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THE DEFINITIVE GUIDE TO MARKETING PERSONAS

What they are, why they matter, and how not to mess them up

DEFINITIVE GUIDE TO MARKETING PERSONAS

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WHAT THEY ARE

The concept of a persona has been around since ancient Roman times, when it described a mask worn by an actor to portray a specific role.

Since then, the term has cropped up in performing arts, literature, and psychology before finally making an appearance in the field of marketing sometime in the 90s. But it's only very recently that marketing personas have started to gain traction.

In fact, [Google Trends](#) suggests that no one was searching for “buyer personas” before 2007. And The [Buyer Persona Institute](#) wasn't even founded until 2010.

Yet suddenly, today, they're everywhere. If you're a marketer, you're either hearing about them, talking about them, or wondering how much longer you can coast along without them. How did personas become the latest must-have marketing tool? And do they actually live up to the hype?



A Brief History of Personas

| ANCIENT TIMES >>> | 1950 >>> | 1990 >>> | 2014 >>> | 2016 >>> |
|--|--|--|---|--|
| Roman actors use “personas” to become different people on stage. | Jungian psychologists and modernist poets use personas to tap into revealing human archetypes. | UX designers and the marketing vanguard use personas to understand and guide people's behaviors in different environments. | Nearly half (44%) of marketers use personas to guide and inform inbound (and outbound) marketing strategies. ¹ | Nearly two-thirds (63%) of marketers create marketing content using buyer personas. ² |

¹ ITSMA Online Survey: Increasing Relevance With Buyer Personas and B2I Marketing, 2014.

² Curata, Content Marketing Staffing & Tactics Study, 2016.

WHY THEY'RE IMPORTANT

In a world of mass mailing, automation, big data, and conversion metrics, it's easy to forget about the personal touch in our marketing activities.

But without it, our strategies lose focus, depth, relevance, and—most importantly—optimal ROI. As people wade through more emails, more ads, more touchpoints, and more data, they're deleting or ignoring anything that isn't totally relevant, immediately valuable, and perfectly timed. As patience wears thin and expectations rise, personalized experiences help you cut through the noise and reach your market.

And we can't personalize the experience without personas.

Personas are fictionalized characters that represent the needs, fears, and aspirations of a specific market segment *as they relate to your products and services*.

Creating personas forces us to explore the needs of our buyers in greater detail, so that we can meet and even anticipate those needs. What do they do in a day? What keeps them up at night? What are their goals, and how can we help them reach those goals?

Replacing vague assumptions or sparse facts and figures with a human face and storyline can transform your content, tighten your marketing strategy, empower sales, and even uncover profitable new markets.



PERSONAS DRIVE REVENUE

Companies that exceed their lead and revenue goals are more than twice as likely to create personas and use those personas for demand generation than companies that miss their goals.³

HOW TO RESEARCH THEM

You get out of a persona what you put into it. Slapping a stock image into a PowerPoint slide and giving it a name, a job title, a family and a fun hobby won't give you much in the way of returns. But dig deeper, and you'll discover things that can help you understand and communicate with your prospects and customers on a new level.

- ▶ **Internal interviews.** There is a wealth of information hidden within your organization. Your sales team, customer service, marketing, and leadership team all hold important pieces of the puzzle. Through a structured discovery process, you can collect and synthesize these insights to develop a deeper understanding of who your most profitable markets are and how you can engage them more effectively.
- ▶ **External interviews.** This is where the rubber hits the road. Talking directly to your prospects and customers will always reveal something new and valuable. And don't be afraid to talk to the "ones that got away"—the prospects who chose a competitor's products or services over yours. By interviewing them in a respectful and non-confrontational way, you can find out where your sales and marketing process may not be communicating the full value of your offerings. Or you may discover that this market segment is simply not a good fit—an insight that can help you refocus your efforts on more viable segments.
- ▶ **Behavioral data.** The way your prospects and customers behave can be very revealing. What types of emails are they most likely to open and act on? Which website pages do they visit more frequently? When are they most active online? What types of content do they share, and which social networks do they share with? There are a host of new tools that can help you gather this type of data, including [Sysomos](#) for social media monitoring and [ClickTale](#) for website engagement. While interviews will tell you what they say, behavioral data will tell you what they do, which could tell another story altogether.
- ▶ **External research.** Research analytics and market intelligence firms such as Aberdeen Group, Forrester, Google, and many others can help you identify the macro trends that are influencing the priorities, preferences, and behaviors of your target markets. How are emerging technologies changing the game? Social trends? Regulatory issues? Industry challenges? Global markets?

There are many effective ways to create personas, and there's no definitive right or wrong way. Get creative. Listen hard. Stay open-minded. And use every resource available to build the most complete, accurate, and insightful profile possible.

“Don't be afraid to talk to the “ones that got away”—the prospects who chose a competitor's products or services over yours.

HOW TO INTERVIEW FOR THEM

- ▶ **Structure your interviews.** Whether you're interviewing members of your sales team, an existing customer, or a viable prospect, don't ever "wing it." Always come prepared with a list of carefully crafted questions that have been reviewed and approved internally. Not only is this more respectful of the interviewee's time, but it ensures you're collecting the right information from every participant.
- ▶ **Probe for details.** Asking the right follow-up questions can make or break your personas: "What do you mean by 'feature-rich'?" "What do you mean by 'internal politics'?" While you never want to make your valued interview subjects feel uncomfortable or harassed, you do want to make sure you're uncovering real insights. Think of yourself as an investigative journalist, and aim to reveal something new and unexpected.
- ▶ **Embrace the challenges.** It's impossible to start the persona-building process without some preconceived notions about what you'll find. But it's important to fight the urge to finish interviewee's sentences or skip questions you "already know the answer to." Most importantly, when an interview subject says something unexpected, don't dismiss it as an outlier. Follow up on it and press them for a deeper explanation. Those moments that challenge your expectations will be the most rewarding and illuminating.

“When an interview subject says something unexpected, don't dismiss it as an outlier.”

HOW TO STRUCTURE THEM

Not all personas are created equal. Some are little more than a stock photo surrounded by a few choice demographics and firmographics rounded out with a fictitious “hobby” or family status.

A great persona--one that delivers real insight and supports robust personalization--won't fit on a single page. It needs to include multiple dimensions that capture rich, contextual information about the buyer's workplace challenges and aspirations, their peers, the networks they rely on for insight and information, and much more.

There is no single right way to build a multidimensional persona, but these are the dimensions we focus on at DemandLab:



- ▶ **Perceptions:** Which trends are impacting the person at work, and what do they think about them?

When we know this, we know how to... **place our solution in a wider context that is relevant and meaningful to the buyer.**

- ▶ **Triggers:** What triggers the search for a solution?

When we know this, we know how to... **identify the people who will be receptive to hearing from us and benefit most from our solution.**

- ▶ **Expectations:** What operational or personal results does the persona expect or hope to see from the solution?

When we know this, we know how to... **address the risks and accentuate the rewards that buyers perceive in our solutions.**

- ▶ **Barriers:** Which factors might cause the person to abandon or pause the journey, or choose a competing solution?

When we know this, we know how to... **address and dispel negative experiences and perceptions that act as roadblocks.**

- ▶ **Priorities:** Which factors and features does the buyer prioritize and evaluate as they explore and compare their options?

When we know this, we know how to... **identify the attributes that the persona actually cares about and prioritizes.**

- ▶ **Influences:** Which internal and external factors influence the buyer's decision-making process?

When we know this, we know how to... **leverage the power of influence to strengthen and accelerate the buyer journey.**

WHAT NOT TO DO

▶ **“We know our customers better than they know themselves.”**

Approaching people—whether they’re your prospects, your customers, or your competitors’ customers—is hard. It takes time. It takes effort. It takes persistence. It takes courage. And for that reason, you’ll often get pushback. A lot of people in the organization will tell you that they already know everything there is to know about the way the target market thinks and acts. But without hearing it directly from the source, your personas are nothing more than a set of untested assumptions wearing a stock photo and a fake name.

▶ **“Let’s not waste time interviewing people who aren’t decision-makers.”**

On the surface, this makes sense. Nothing can happen until the person holding the wallet flips it open. But that decision-maker almost never initiates or conducts the search for a new solution. Instead, they evaluate the options that other people in the company bring forward. So if you try to jump the queue and appeal directly to the decision-maker, you’ll be talking over the heads of the people who truly hold the power to persuade.

▶ **“Ooh, let’s give this one cool glasses.”**

Choosing a name, a photo, and various lifestyle elements for a persona can be an important part of the process, but don’t let these superficial considerations derail the main event—uncovering valuable insights into the intellectual and emotional triggers that encourage them to engage with your brand and select your products and solutions. While photos and personal details can help bring a persona to life, fussing over the type of car they drive or whether they prefer golf or paintball isn’t going to yield a significant return on the time invested. In fact, some organizations choose not to personalize their personas with photos, genders, family status and so on because it can create false assumptions or take focus away from the more important data.



While nearly half of marketers say they are now using personas, only **15%** of those marketers are using them very effectively.⁴

⁴ ITSMA Online Survey: Increasing Relevance With Buyer Personas and B2I Marketing, 2014.

HOW TO USE THEM

One of the biggest mistakes you can make is to create personas and then file them away under “D” for “done.” They need to be promoted within the organization and used as a primary reference for every marketing and sales initiative.

Make a point of presenting the new personas internally. Explain how they were created and how they should be used. Keep them in front of you as you develop or update your marketing strategy. Integrate them into your platforms, systems, and processes so that salespeople, marketers, and content creators can use them to understand and support the lead lifecycle.

- ▶ Use personas to refine the key messaging for your company and its solutions. You may find that you need to adapt the messaging to align with the needs of different personas.
- ▶ Add personas to content creation platforms so that content creators know who they’re writing and designing for.
- ▶ Use persona data to guide segmentation in your CRM and personalization choices in your systems of action, such as your marketing automation platform.
- ▶ Load personas into customer experience platforms such as [Sitecore](#) to guide seamless prospect and customer journeys across channels such as call centers, social media, mobile, and more.
- ▶ Use personas to identify the content themes and distribution channels that are most likely to generate awareness and demand for specific customer segments.
- ▶ Share personas with the sales team, and align sales enablement content assets to each persona.

⁵ Onespot and Marketing Insider Group, The Personalization Imperative for Content Marketing, 2016.

⁶ HBR, How Marketers Can Personalize at Scale, 2015.



THE POWER OF PERSONALIZATION

78% of consumers say personally relevant content increases their purchase intent⁵

Personalization can deliver **5-8x** the ROI on marketing spend⁶

Personalization can lift sales by **10%** or more⁶

ANATOMY OF A PERSONA

There's no single recipe for the perfect persona. But there are a number of elements that should be included. This sample persona has been streamlined and simplified, but it gives you an idea of how all that market research comes together and can be used to improve your marketing efforts.


1 We can see both frustrations and aspirations here that could effectively drive awareness campaigns: tips on repurposing existing content or generating content more affordably would work well. We can also see that this persona is interested in exploring opportunities for growth—not just solving their pain.

2 This tells us that we need to produce content that helps practitioners convince the decision makers. For example, we could develop ROI calculators and case studies that show how the product supports business goals.

3 This tells us where we need to pitch our offering from a technical perspective. Offering an "Idiot's Guide" to our product category or a helpful glossary of common terms and acronyms would work well.

4 We can address this fear by incorporating Net Promoter Scores®, adoption rates, success metrics, case studies, and testimonials into the consideration and selection stages of the buying cycle.

5 Direct quotes from your customers and prospects is essential. Hearing what they think and feel in their own words—not in words that have been interpreted, massaged, or sanitized—breathes life into personas.



THE "SKEPTICAL VISIONARY"

Carrie Elson, Content Marketer

5 "I see other marketers who are treated like rock stars in their organization, but I feel more like a roadie."

1 **My realities:**
My role is evolving fast. This job didn't even exist 10 years ago and content technologies, standards, channels, and best practices keep changing.

Sales is always pressuring me to deliver more leads and create more content, but I can't do it without more time and resources.

I may sound stressed and negative, but honestly, I'm excited about the potential of my field and I see nothing but growth in my future.

2 **My challenges:**
Lack of buy-in. I know I need to invest in technology, but my boss thinks we're doing fine with Constant Contact.

3 **Lack of expertise.** I'm not a technical person, and I find marketing automation really intimidating.

4 **Lack of confidence.** Marketing technology is a big investment; if it doesn't generate ROI, that could ruin my career.

6 **My goals:**
Minimize administrative burden. Be more strategic, less reactive. Feel more confident about technology. Prove my value to the organization. Reduce friction with sales.

7 **I care about:**
The respect of my colleagues and peers. Recognition, awards, career advancement.

8 **I listen to:**
Thought leaders like Robert Rose, Joe Pulizzi, Ann Handley. Peer reviews on Capterra and TrustRadius.

9 **I want to hear about:**
What my peers in the SMB world are doing. Usable tips and best practices. Trends and validated research.

10 **I gather information from:**
Twitter, LinkedIn, industry blogs and newsletters, Vendor events, American Marketing Association.

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6 These goals can help us choose relevant topics for early-stage engagement and show us which product features and benefits will be most appealing during the later stages of the buying cycle.

7 These are topics we can add to the mix during the awareness stage with blog or newsletter themes such as, "5 Skills Every Marketer Needs to Learn," and "Why Marketers are Such Terrible Self-Promoters—and Why They Need to Fix That." These themes can also feature in later-stage case studies.

8 This can tell us a lot about the communication style and content the persona prefers, and can also provide insight into places where sponsored content or guest-writing could pay off.

9 Here are some more great insights into content themes and formats we can use to attract and engage this persona.

10 This information helps us prioritize the communication channels that we should spend time cultivating.

NEXT STEPS

If you're ready to put the power of personas to work for you, we hope this ebook has given you some good ideas and a solid foundation to build on.

If you plan to develop personas yourself and you're looking for more on the subject, we recommend:

- ▶ **Jodi Harris's** [How to Create Easy, Yet Actionable, Content Marketing Personas](#)
- ▶ **Ardath Albee's** [Intelligent Guide to Buyer Personas](#)
- ▶ **Adele Revella's** [Buyer Personas](#)

If you'd rather leave it to the experts, talk to us! DemandLab has developed personas for a wide range of B2B organizations, along with buyer journeys and other foundational elements of an effective marketing strategy.

LET'S TALK



DemandLab is a technology-focused marketing consultancy that accelerates revenue for its clients through customized strategic solutions. Learn more at demandlab.com.

P 267.297.2192

E contact@demandlab.com

www.demandlab.com



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