Customer Persona

Objective: to understand the behaviours of your "ideal" customer(s)

You may have several customer types (3-5 is normal). Do this exercise for all of them

- They may be overlap between them
- The greater granularity (detail) you can get in your profiling the better

STAGE 1: Basic demographics and behaviours

- ☐ Job title
- ☐ Key information about their company (size, type, etc.)
- ☐ Details about their role
- ☐ Demographics
- ☐ Age
- ☐ Gender
- ☐ Salary / household income – how likely someone is to buy is often more useful than how much "cash" they have or how much they earn
- ☐ Location: urban / suburban / rural
- ☐ Education
- ☐ Family

STAGE 2: Value Proposition / Tasks

- ☐ Goals and challenges
- ☐ Primary goal
- ☐ Secondary goal
- ☐ How you help achieve these goals
- ☐ Primary challenge
- ☐ Secondary challenge
- ☐ How you help solve these problems
- ☐ Values / fears
- ☐ Primary values
- ☐ Common objections during sales process

Stage 1-2

STAGE 3: all the rest

- My customer is: an individual/ a corporation/local authority/PCT/SHA etc.

- My customers are located: area list, plotted on a map etc.

- My customers purchasing decisions are based primarily on:

  o Price, best value, quality, political pressure etc.

- For formal commissioning or procurement they cycle is depletion, annual, three yearly etc.

  o Buying decisions are made at Office/team/dept/regional level

  o Who identifies the need? User /beneficiary, formal faction or business review, catastrophic failure, media pressure?

  o Who influence purchases? Within their business function they are typical influenced by these people (e.g. head of service influences a procurement officer in that department)

  o Who has budgetary sign off / authorises purchases

- What need does your product fill for your customers?

- Reactive – security, risk, protection, maintain the status quo?

- Pro-active – increased effectiveness, faster to market, better quality etc.?

- My customers are in the following age range

  o Sometimes a good indicator of certain types of attitude or behaviours

- My customers are: % male % female (B2C rather than for B2B / B2G)

- My customers typically read these trade journals

  o Who else does your client listen to, trust and buy from?

- My customers typically attend these conferences

- My customers typically belong to these professional bodies

  o Online – newsletters, LinkedIn member groups etc.

  o Offline – local CPD events, sector social circles, conferences

- My customers are typically informed by this/these Key Opinion Leaders

  o e.g. an elected official influences civil servants, media commentator influences his / her readership

Stage 3

Stage 4:

Additional flavour

- ☐ Hobbies
- ☐ Real quotes from interviews with customers
- ☐ Computer literacy
- ☐ Where they get their news
- ☐ Blogs they read