

# Buyer Persona Worksheet

## Personal Information

# Buyer Persona Profile

Tips: Focus on mapping out a typical day. That section can inform all of the other sections in this worksheet.

## Role

- Job Title/Role
- Required Skills
- How is the job measured?
- Knowledge and Tools Used
- Typical Day
- Who do they report to/who reports to them?

# Buyer Persona Profile

Tips: Think about different definitions of “success” and what success entails in different industries and roles.

## Company

- What industry does the company fall under/what industries do they serve?
- Size of company [employees/revenue/etc.]?

## Goals

- What is Persona responsible for?
- What does it mean to be successful in Persona's role?

# Buyer Persona Profile

Tips: When thinking about challenges, include limitations of their status, age, abilities, etc.

## Challenges

- What are Persona's biggest challenges?

## Watering Holes

- How does Persona learn about new information for their job?
- What publications or blogs does Persona read?
- What associations/social networks used?

# Buyer Persona Profile

Tips: Feel free to add more categories under “personal background.” Be creative!

## Personal Background

- Age
- Family
- Education

## Shopping Preferences

- How does Persona prefer to interact with vendors?
- Do they use the Internet to research?
- How do they search? Keywords, etc.?

# Buyer Insights Worksheet

Motivations, Goals, Problems

# Buyer Insights

Tips: Your intentions for your product and why your persona might need/use it are two different things.

## Priority Initiatives

- What causes Persona to invest in solutions like yours?
- How does Persona differ from buyers who prefer other solutions?

## Success Factors

- What operational/personal results does Persona expect from your solution?
- How will your solution make Persona successful?

# Buyer Insights

Tips: Clearly addressing objections and barriers in your content is a very persuasive marketing strategy.

## Perceived Barriers

- Concerns - why might Persona not see you as the best option?
- Where is negativity [resistance, negative perception of company] coming from?
- How can you overcome negativities & address objections?



# Buyer Insights

Tips: Put lots of info in each Buyer's Journey stage to balance them out. Good content will target every stage.

## Buyer's Journey

- Awareness Stage
  - Consideration Stage
  - Decision Stage
- How are options evaluated?
  - What affects decisions at each stage?
  - Who is involved - who helps, who gets in the way?
  - What do you offer at each stage?

# Buyer Insights

Tips: Think about what could make or break a decision between competing offers.

## Decision Criteria

- Persona's critical aspects/expectations of competing offerings?
- Describe how your solution offers the capabilities Persona cares about.
- What specific features does Persona care about [special features, implementation issues, ease of use, price vs. value, etc.]?
- What do those things MEAN? [e.g. ease of use - what does "easy" mean to them?]

# Buyer Insights

## Implications

- How would the success of your product benefit Persona [promotion, record sales, etc.]?
- How would the failure of your product impact Persona [lose job, downsize, etc.]?

## Buyer Ecosystem

- How much competition do you have?
- How much information is available to Persona?
- Are buyers asking for things you are not providing?

# Buyer Insights

## Differences Between Potential Personas

- What makes each of your potential personas unique?
- How can you emphasize differences?
- And minimize similarities?

# Buyer Persona Example

1

# Name: Example Emily

2

## Role Background

- Director of Marketing
- At company for ten years
- Oversees several underlings, reports to VP
- Interned at company for a year before being hired full time

3

## Demographics

- Skews female
- Age 30-45
- Income about \$60k/year
- Suburban home
- Married, no kids
- Bachelor's or Master's Degree

4

## Professional Life and Responsibilities

- Friendly, focused, analytical
- Mostly works digitally - sends and receives little paper communication
- Spends time tracking sales, planning campaigns, identifying customers, overseeing younger marketing employees

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1

# Name: Example Emily

5

## Goals

- Correctly analyze economic trends and supply-demand to create effective marketing campaigns
- Increase sales by influencing product development
- Persuade customers to buy their product over competitors'

6

## Challenges

- Attracting buyers with an unappealing, outdated website
- Establishing trust with potential buyers

7

## Info Hangouts

- Marketing blogs
- Marketing events/conferences
- Webinars/workshops
- Marketing Twitter accounts, Google+ Groups, Quora forums
- General marketing forums

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1

# Name: Example Emily

8

How We Help Them Succeed

9

Real Quotes from Buyers

10

Perceived Barriers

- Modern, effective web design attracts buyers
- Content marketing builds trust with buyers
- Optimized inbound marketing strategy increases overall sales
- “Why should buyers be impressed with our website when WE don’t even like it?”
- “People are clicking on our site, but they don’t DO anything. How can we make them stay?”
- Our existing customers like our current site. What if they don’t like the new one and we lose them?
- I don’t even know if this “inbound marketing” stuff actually works.

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1

# Name: Example Emily

11

Quick Marketing  
Message

12

Hook

- Attractive and professionally optimized web design for businesses
- Our modern web design and inbound marketing techniques make it easy for you to grab [and keep] the attention of your buyers.

# Buyer Persona Template

1

Name:

2

Role Background

3

Demographics

4

Professional Life and  
Responsibilities

1

Name:

5

Goals

6

Challenges

7

Info Hangouts

1

Name:

8

How We Help Them  
Succeed

9

Real Quotes from  
Buyers

10

Perceived Barriers



1

Name:

11

Quick Marketing  
Message

12

Hook

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