



Chapter 3

BUYER PERSONAS: WHO ARE YOU TALKING TO?

When you're manufacturing demand, you have to start with raw materials, and in this case that means prospects—lots of them. The best way to communicate with a prospect is by starting with a very clear picture or *persona* of the ideal customer. You can't communicate effectively—in any context—until you know exactly who you're communicating *with*. Without knowing who that person is, you have a very limited ability to gauge and take measure of the recipient of your communication.

You can't effectively calibrate your message, voice, content, timing, and other essentials of good communication. In this chapter, we'll learn about identifying your buyer, developing a persona for each buyer so that you can automate one-to-one communications, using their online behaviors to identify quality candidates, supplementing your understanding with well-chosen third-party data, and providing timely and relevant content that corresponds to each stage of the buying cycle.

In a buying environment that's increasingly characterized (at least in preliminary stages) by online anonymity as buyers peruse information and resources without identifying themselves, it's becoming very difficult to simply know who the buyer is. That anonymity also creates content challenges because today's buyer will consume content not only on your company's website but from countless third-party sources. He'll scan all over the Web for information about your products and services. He'll do Twitter searches. He'll consult social media friends. He'll read the user reviews. He'll take in the industry trade publications or independent research. And all of that research is often taking place before you even know who this prospective buyer is. You don't have much control over that. But what you *can* control is the content that you produce and syndicate yourself.

And, of course, before you can produce that content, you need to know a fair bit about who will consume that content. In concert with your counterparts in sales, you need to develop rich buyer personas that capture the "buying backstory" about typical prospective buyers.

But what is a *buyer persona*? It's a fictional character that you develop to represent a targeted demographic type—a typical customer or prospect. It is usually more effective if you can humanize the persona and almost bring it to life. Building a buyer persona for marketing is much like developing a character for a

novel or a movie. The difference is that you're not really making anything up from scratch—your buyers already exist. You're just defining the specifics for an individual “average” buyer.

THE BUYING COMMITTEE

Of course, you need to see and understand that buyer in context. For B2B *considered* purchases, that often means some form of buying committee. Who has a place at the table when it comes to making purchasing decisions? Who typically holds the most sway in these matters? Users? Technical buyers? Economic buyers? Where do they get their information? What do they rely on and value? Who are their peer groups?

These aren't easy questions to answer, and that's where your alignment and partnership with sales becomes crucial. Your sales counterparts will play a critical role in helping you identify and flesh out these personas. It's essential that sales and marketing have a fundamental level of agreement in establishing these personas.

THE STAGES OF THE BUYING CYCLE

Once you believe you've successfully identified and articulated the key roles on the buying committee, it's time to work with the stages of your buying cycle. The abbreviation AIDA was coined by American advertising and sales pioneer E. St. Elmo Lewis in 1898 to describe the consumer's buying process: **A**ttention—**I**nterest—**D**esire—**A**ction. Today, our understanding of this process has evolved into five stages: need recognition, information search, evaluation of alternatives, purchase decision, and post-purchase behavior.

Now, you needn't rigidly adhere to these stages—your business model may dictate other approaches. In fact, I'd like to suggest a further refinement of these phases, a framework that can

work for any non-impulse purchase—B2B or B2C—that involves some level of careful pre-purchase analysis. Let's call it **The Five Stages of Considered Purchases**:

- **Inquire**—Is there a solution to my problem or need?
- **Learn**—How does your solution solve my problem or need?
- **Evaluate**—Do I like your solution (and is it better than others)?
- **Justify**—Do I want your solution (over others)?
- **Select**—I am buying your solution.

CREATING THE PERSONAS

When you first sit down to work on persona development, it might seem more than a little daunting to stare at that blank sheet. If you're looking for some great ideas for defining personas, be sure to check out our Persona Development Tool in the resources area of this book's website (listed below). This template guides you through the process of creating a buyer persona and tees up questions to help you describe your ideal buyer. It's a basic format, allowing you to make your personas as simple or complex as your needs require. The template also provides some examples to help you understand how to complete the template. For our examples, we used the personas of a mortgage broker and a loan processor, which I used back when I was at Ellie Mae.

*Be sure to visit the book's website
www.manufacturingdemand.com
for additional resources.*

I like to start by giving our imaginary person a name and supplying a (stock) photo. This really helps make this persona

feel real, allowing us to more easily endow him or her with skills, experience, education, thoughts, and feelings.

- **The Profile Overview**—In the overview, imagine that you are telling a friend about this person. Is it typically a man or woman? What’s the approximate age? What’s his role? How does she spend her workday? Depending on your product or service, you may want to look at different kinds of attributes that tie more closely to the make-up of the ideal customer profile. The goal here is to build up a solid picture of this person that everyone can recognize.
- **Pain Points**—What does your prospect worry about? What does she wish she could change? Be sure to create your list from the prospect’s point of view. Sometimes it helps to complete the following questions using that person’s “voice”:
 - I’m concerned about...
 - I don’t have...
 - I worry about...
 - I wish...
- **Key Drivers/Motivators**—These are the issues that mean the most to this person: the things that are behind every decision he makes, with particular emphasis on issues relating to your product/service. Complete these thoughts:
 - I want to ...
 - I need to...
 - I must...
- **Role in the Buying Committee**—Is this person the decision-maker? An influencer? Who might influence this person?

- **Effective Influences**—What kind of content and information is most effective in communicating persuasively with this person? Are there particular kinds of information he is most likely to want? Is any one kind of media more effective than another? Is she likely to take advantage of any particular kinds of offers?

In the following example, we can see how a persona comes to life by the use of full and careful descriptions. Ellie Mae sells software to mortgage companies and this profile overview describes the primary decision maker—a mortgage broker:

GARY | MORTGAGE BROKER

Profile Overview

Gary is a licensed mortgage broker and is the owner of the business, similar in role and responsibilities to a CEO. He has responsibility for the overall company strategy, operations, and process establishment, and is typically heavily involved in sales and marketing activities for the firm.

Most brokerage firms are relatively small, so Gary is much like a traditional small business owner: concerned with the day-to-day activities, personnel, and the bottom line. He also functions as a loan officer, generating new business and serving his own set of clients. In common with the majority of mortgage broker/owners, who are male aged 30-55, Gary has about 15-20 years of experience in financial services.

Gary spends a portion of his workday networking with potential clients and driving new business. He also communicates with current clients, especially high-profile or high-value ones. He stays in touch with the loan officers and processors, monitoring their pipelines and ensuring that each loan is progressing as it should, stepping in to help when necessary.

By reading that, don't you have a bit more insight into who this decision maker is and how you might communicate with him? Not only that, going through this profiling process with sales to create a shared vision of the buyer is a great way to start the alignment process.

This simple grid—a “Buyer’s Stage Table”—makes it easy to see how your messaging needs to change based on your prospect’s stage in the buying cycle. First, you define your persona’s motivation at each stage and what questions are being asked at that point. Then, you look at the right messages and value propositions that should be communicated at that stage, and what marketing medium is best. The following matrix shows you how to think about the persona for each phase of the buying cycle.

BUYER’S STAGE TABLE

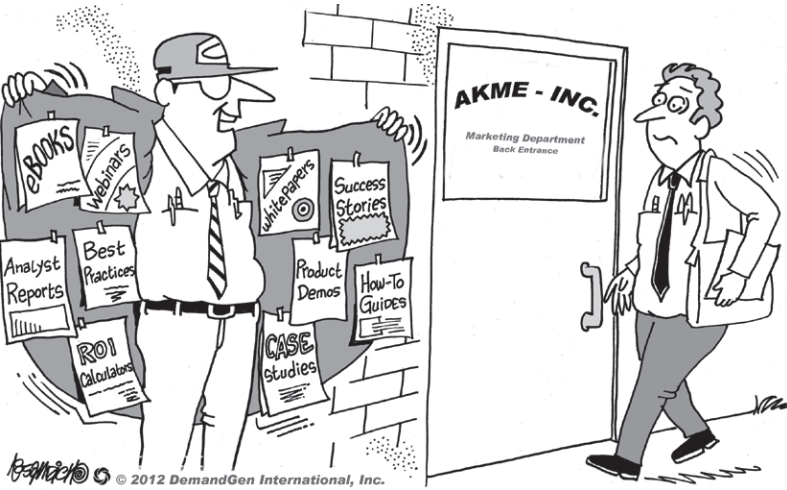
	INQUIRE	LEARN	EVALUATE	JUSTIFY	SELECT
Define the persona’s motivation at each stage.	What interests me?	What do I want to know?	What do I think?	Is this right? What else is needed?	Am I ready to buy?
What questions is your persona asking at each stage?	Questions:	Questions:	Questions:	Questions:	Questions:
Define the key messages and value propositions	Messages:	Messages:	Messages:	Messages:	Messages:
What offers do they respond to?	Offer types:	Offer types:	Offer types:	Offer types:	Offer types:

In the next table, we see what a completed matrix might look like:

	INQUIRE	LEARN	EVALUATE	JUSTIFY	SELECT
<p>Define the persona's motivation at each stage.</p>	<p>My current system is outdated and isn't working for me.</p>	<p>I want to see what's out there.</p>	<p>I need to compare the options.</p>	<p>I am leaning toward this product and want to make sure it's right.</p>	<p>I want this product and I want it up and running quickly.</p>
<p>What are the questions your persona is asking at each stage?</p>	<p>What are top mortgage companies using to run their businesses today?</p>	<p>How do these new systems work and how will they impact my business?</p>	<p>What are the key differences between these systems and what I currently have?</p>	<p>I am leaning toward this product, but is there anything else I should consider like training?</p>	<p>I want this product. What will it take to get it up and running quickly?</p>
<p>Define the key messages and value propositions.</p>	<p>This newer system lets you process more loans faster and make more profit per loan. If you want to comply with new lending laws, you need a system that helps you stay compliant.</p>	<p>These are the key benefits to you, the business owner, and how it supports you and your staff. It is affordable for your size of business and easy to use.</p>	<p>These demos and resources show benefits specific to your needs, such as how it improves your workday and allows for easy migration and deployment.</p>	<p>This solution is very popular and makes a lot of other businesses successful. It is a good investment.</p>	<p>You can take advantage of excellent deployment tools, service and support offerings, and training.</p>

	INQUIRE	LEARN	EVALUATE	JUSTIFY	SELECT
What offers do they respond to?	Content that covers “success secrets of top mortgage firms.”	Content that shows how these new systems will benefit them.	Online demos, webinars, and on-site presentations for larger mortgage firms. Free trials.	Case studies, testimonials, videos from both business owners and their staff, ROI calculator.	How-to guides, implementation tools, and training curriculum.

Persona development is a fascinating exercise to do with your team. You'll discover all kinds of new ideas and insights as you think about each facet of your buyer's personality.



“Psst...Hey, buddy. You want some fresh content?”

MAPPING THE CONTENT

Now that we have roles/personas and stages of the buying cycle, you should build a simple matrix like the one shown in Figure 3.1 that maps your various content assets to the appropriate buying roles and stages. A completed matrix helps you spot content gaps. It will also help you plan your nurture content, so you know which content to use for each persona and when to use it based on the stage of the funnel they are in.

	INQUIRE	LEARN	EVALUATE	JUSTIFY	SELECT
User-Buyer					
Technical Buyer					
Economic Buyer					

Figure 3.1 Sample Content Workbook

HOW TO TAKE YOUR CONTENT TONE AND VOICE TO THE NEXT LEVEL

It's not my intention to make this a book about content generation. Books like *Made to Stick* handle those topics much more capably. But, when it comes to content development, there are still some universal principles that apply.

- **The One-to-One Connection**—It's important to remember the one-to-one connection because ultimately we're all marketing "B2I"—business to individual. We need to talk WITH buyers, not AT them. All forms of buying are eventually based on human interactions—and this remains true even though so much more of the buying activity is taking place outside the view of your sales and marketing team.
- **Start with "Why?"**—As author Simon Sinek said in his book *Start with Why*, Martin Luther King, Jr., didn't proclaim in his legendary speech, "I have a plan." He said, "I have a *dream*." Reaching your would-be buyer on an emotional level is far more effective than starting on a pragmatic level.

MANUFACTURING DEMAND IN ACTION**Citrix Online**

Every month, more than 17,000 new customers begin to use Citrix Online's world-class collaboration tools to work from anywhere with anyone, saving them time and enabling them to get more done. Products such as GoToMyPC, GoToMeeting, and GoToAssist have redefined how people communicate and collaborate around the world. However, the use cases for these different products varies greatly, depending on the prospect's role within the prospect organization.

Citrix Online's product marketing team developed specific personas for each product and ensured that content assets were appropriate for each product and market segment. Prospects without an identified persona are tagged with persona values as they respond to various offers.

By building personas for each prospect who could use their solution for virtual conferencing and avoid costly, time-consuming travel, Citrix Online has dramatically improved the performance of its lead nurturing campaigns. Weekly campaigns have seen response rates rise significantly and Citrix Online achieved more than 100 percent of its assigned lead goals (compared to 90 percent before their persona-based marketing efforts).

"We realized that we needed to speak to the specific needs of our prospects," said Baxter Denney, Citrix Online's manager of database marketing. "With our personas, we can now send out content offers by persona and segment our marketing efforts to target appropriate groups with appropriate information at the appropriate time. As a result, we've enjoyed increased response rates, which is helping us meet revenue targets."

- **Use a Personal Tone**—We are all inundated by messaging every day, especially in our email inboxes. Messaging that’s written for the masses will not engage your prospects. *Talking* to them—especially if you talk to the persona—will connect them to your message on a personal level. Too often, I see this type of writing: “Don’t miss our webinar Monday at 1 p.m. on how our [product name] helps with regulatory compliance.” Try this kind of tone instead: “We’re holding a webinar for mortgage brokers next week on regulatory issues plaguing our industry. Can you join us? It’s Monday at 1 p.m.”

Remember: Avoid the temptation to continually focus on your company and your products. Think about the buyer’s perspective, not your own. Don’t be that guy who does all the talking on the first date!

OPERATIONALIZE THE PERSONAS

Since so much of the early-stage buying activity is self-directed by somewhat anonymous site visitors, we lose a crucial advantage: the ability to read the body language of the prospect. Any savvy retailer or experienced direct-sales rep develops a keen ability to recognize both explicit and implicit buying intentions just by watching and observing the buyer and his/her actions. A jewelry saleswoman can assess a prospect’s buying intentions and facilitate the sales process when she has a prospect asking to try on pieces of jewelry or when she learns the prospect is shopping for a special occasion. A car salesman can size up a prospect’s propensity to purchase and tailor his approach accordingly just by asking what type of car the person currently drives and if he bought or leased the car.

Fortunately, we can achieve similar (though derived) levels of insight by examining what author and Eloqua co-founder

Steve Woods, calls *digital body language*¹—the so-called “mouse-trails” that are generated by our marketing automation systems by people visiting our websites, clicking emails, and submitting website forms. We can “see” and gauge the level of interest by analyzing such online metrics as:

- The number of website visits by that individual
- The key areas visited, such as pricing pages or product selectors
- The quality of the email address—is it from a “free” domain or a work domain?
- The number of pages visited. (The average is 2.5, so if the visitor is looking at, say, more than six pages, we can infer a high level of interest.)
- What terms they searched for to arrive at the site
- The types of assets downloaded
- The amount of time spent on the site

These types of measurable online behaviors help us identify someone who’s moving through a buying cycle. How can you be sure? Correlate. Take your 10 most recent customers and “reverse-engineer” their online buying process by reviewing the key interactions with your website and content that’s stored within your marketing automation system. From their first interaction through closed transaction, what did they do? If they are not atypical customers, their mousetrails will be fairly good indicators of behavior for who might purchase in the future.

To operationalize your personas—which means creating that persona in your database—you must identify the fields in your database that correspond to the characteristics of your personas. Each persona must have a unique combination of fields—things

¹ *Digital Body Language*, Steve Woods, New Year Publishing, 2008.

like role/title, industry, size of company, department, geography, and the other attributes specific to your personas.

How do you populate those fields—how do you get that data? You can obtain it in a couple of different ways. First, you can capture it when the prospect fills out a form. Let's pause and note that we must carefully think about the forms we present and where in the buying process we ask for data. Early in the buying cycle, it can be off-putting to ask for a lot of data. It's too soon. However, after the visitor has appeared a couple of times or has requested a higher-value content asset (e.g. an e-book or a free trial), it's entirely appropriate to ask for a few more bits of persona data.

We can infer some of this data from an IP address (and there are software tools that excel at this task). We can also infer some of the answers from the visitor's digital body language and by the nature of the content assets requested. Finally, we can supplement our own data with third-party information from external sources that integrate with your website, CRM, or marketing automation system.

Armed with a holistic, 360-degree view of the prospective buyer, you're in a much better position to understand the nuances and factors that subtly shape buying behavior and purchase decisions. You can begin to map online activity to specific roles—and then respond in a one-to-one fashion that creates true dialogue and engagement—not boring chest-thumping. Persona development takes time and patience—and don't be afraid to go back and continue to refine. Personas, in fact, should change regularly to stay in step with changes to your business and your market. Put in the effort early, and you'll find that the payoff down the road is immense.

KEY TAKEAWAYS

- It's essential to know *who* you are talking to. When it comes to messaging, one size doesn't fit all.
- Make plans for different buyers as they pass through the five stages of the buying cycle for considered purchases:
 - Inquire
 - Learn
 - Evaluate
 - Justify
 - Select
- A persona profiles a stakeholder's specific role in the buying process and has the following components:
 - Profile overview
 - Pain points
 - Key drivers/motivators
 - Role in the buying committee
 - Effective influences
- Content-Development Tips
 - Make a one-to-one connection.
 - Start with "Why?"
 - Use a personal tone.
- Operationalize the Personas
 - Learn to read *digital body language*—the mousetrails of data generated by site visitors.
 - Correlate the activities of your 10 most recent customers with their site behavior and buying process.
 - Identify the unique combination of fields in your database that correspond to the characteristics of your defined buyer personas.
 - Use inferred data to flesh out personas.