B2B BUYER PERSONA TEMPLATE

NEW ZEALAND TRADE & ENTERPRISE
Te Taurapa Tūhono

Buyer personas are semi-fictional representations of your ideal customers. They allow you to capture insights about your target customers so you can customise your products and services, and better identify how to target new prospects.

How to use this tool

This template will help to organise your data into a clear and structured buyer persona. The objective is to create a generalised depiction of a specific type of customer that you are targeting.

1 Do your research

There are many potential sources of information that will help you to build your personas, including salespeople and distributors, your customer relationship manager (CRM) system, website analytics, customer surveys and social media.

On myNZTE you'll find articles, research and advice including:

- **Made with Care**: a global campaign to grow awareness and preference for NZ food and beverage products
- **See Tomorrow First**: building awareness of the strength and capability of NZ's tech industry
- **Research reports**: helping you understand markets and consumer preferences
- **Market guides:** exploring potential export markets and the people within them
- **How to create buyer personas to tailor your marketing**: the guidance page for this template

2 Fill in the template

Complete the template on the next page. You'll also find a completed example to help you.

Start by developing 3 or 4 personas, and return to this template as you continue to collect customer insights.

Buyer personas should be living documents that evolve to become more factual over time.

3 Putting your personas to work

You can use your completed personas to tailor your marketing, focus your international sales efforts and let your partners know who you're targeting in market. For more examples of how to use your buyer personas, see the final page of this tool.

To speak to a customer advisor about next steps, email your completed tool to exporthelp@nzte.govt.nz

BACK TO myNZTE BUYER PERSONA PAGE

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B2B BUYER PERSONA

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Persona name:

Persona title:

Company

Describe the company this person works for or owns.

Industry:

Location:

Business type:

Number of employees:

Annual sales:

Specialties/brands:

Company culture

Bio

Provide some details about the persona and their background. What makes them an ideal customer?



Age:

Background & characteristics

Key relationships

Who are they closely associated with in their professional ecosystem?

Role in decision-making process

Are they the decision-maker? Or an influencer?

Why should they be a customer?

How is their performance measured?

Goals to achieve

What is this persona trying to achieve by considering purchasing a product or service like yours?

1.

2.

3.

Pains to avoid

What would this persona want to avoid happening when using a product or service like yours?

1.

2.

3.

What would your persona say?

What kind of statement would this persona make when considering purchasing a product or service like yours?

What do you want them to say?

What kind of statement would you want this persona to make when considering purchasing a product or service like yours?

B2B BUYER PERSONA - EXAMPLE

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Persona name: Estelle

Persona title: Managing Partner, Managing Director, CEO

Company

Describe the company this person works for or owns.

Industry: Marketing

Location: Los Angeles

Business type: Small marketing agency

Number of employees: 0 – 50

Annual sales: US$3m

Specialties/brands:

Graphic design, social media marketing, web design. Provides hosting solutions for it's customers. Has multiple customers on subscription.

Company culture

The company is a small yet mighty marketing agency with 4-5 full-time staff and a substantial network of subcontractors. It's a work hard, play hard culture, driven to deliver for the client at all times.

Bio

Provide some details about the persona and their background. What makes them an ideal customer?



Age: 35 – 45

Background & characteristics

After working for many years as a senior client manager in large marketing and advertising agencies, Estelle decided to set up on her own. Her job is 24/7 as she juggles client relationships and business operations. She's strategic and ambitious and loves to win new business. In her ideal world, her agency will be much bigger but still feel 'boutique'. She embraces technology to streamline processes for her team. Looking after finances is a necessity but also a chore.

Key relationships

Who are they closely associated with in their professional ecosystem?

Internal: Account managers, project manager & creative partner

External: Lawyer, accountant, team of sub contractors, clients & prospects

Role in decision-making process

Are they the decision-maker? Or an influencer?

Overall decision-maker, but will need to discuss with her creative partner.

Why should they be a customer?

Estelle is motivated to be more successful and is always looking at ways for the agency to build resilience and grow. She wants:

- visibility of finances, giving her a sense of business certainty, providing peace of mind (allowing her to sleep better at night)
- to build trust and a reputation as a commercially credible company with staff, contractors, vendors and customers.

How is their performance measured?

Being able to pay wages and bills on time, including paying herself. High staff morale resulting in longevity of employment. Awards/recognition for creative or strategic work. Winning new business and retaining long-term client and vendor relationships.

Goals to achieve

What is this persona trying to achieve by considering purchasing a product or service like yours?

1. Making financial management easier
2. Constant and efficient tracking and management of all projects
3. Freeing up time to focus on growth and her team, helping them to focus on doing a great job

Pains to avoid

What would this persona want to avoid happening when using a product or service like yours?

1. Systems that add to her workload
2. Costly and time consuming implementation
3. Suppliers that don't understand the marketing industry (speak the lingo)

What would your persona say?

What kind of statement would this persona make when considering purchasing a product or service like yours?

"Financial management is an essential part of my job but it grinds me down every day. I never seem to get on top of it."

What do you want them to say?

What kind of statement would you want this persona to make when considering purchasing a product or service like yours?

"Now I have financial visibility so I can plan ahead and sleep at night."

HOW TO USE YOUR PERSONAS

NEW ZEALAND TRADE & ENTERPRISE
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Drive your product development

Think about what products and features you need to take to market to appeal to your buyer personas. Are you helping them meet their specific needs, achieve their goals or solve their problems?

The New Zealand Government offers a number of services which will help you make sure your product meets market demands.

- **mfat.govt.nz** helps with technology and education, and with research and development grants
- **How understanding your customers can drive export success**
- **Creating B2B personas for the US and Canadian markets**
- **Made with Care**: a global campaign to grow awareness and preference for NZ food and beverage products
- **See Tomorrow First**: building awareness of the strength and capability of NZ's tech industry

Target your marketing

Putting yourself in the mind of your personas will help you decide how to reach similar customers, using the right channels, with the right message and content.

Tailor your direct marketing and communication efforts by tagging your customer profiles in your CRM system so you can extract contacts relating to a persona, feed this into social media, then target 'lookalike audiences' – or groups of people with similar traits to your personas.

Optimise your website for SEO, AI search and Google advertising, by aligning your keywords with the needs and interests of your personas.

If you're working with an agency, whether brand, advertising or design etc, having clear buyer personas will help them target their work to resonate with the right audience.

- **How to use buyer personas in your consumer goods business**
- **SaaS sales & marketing channels**

Shape your user experience

When you're designing your website or store, take your personas into consideration. Create user journeys that make sense to them; tailor the experience to meet their needs and preferences. It might mean creating landing pages or adding signposting (eg, specific call to action buttons) to help them navigate through the site easily.

When you're **writing content** for your website, social media or advertising, imagine you're talking to your personas. Are you addressing their challenges, goals and preferences? You can even develop a standardised messaging framework, using your personas to shape all of your content creation and campaign activities.

- **Creating an international website for your target market**
- **Adapting your content marketing strategy for the United States**

For more ideas on how to use your buyer personas, go to **How to create buyer personas to tailor your marketing**.

Check out all our export resources at **myNZTE**, sign up for our free **Export Essentials course**, or discuss next steps with our customer advisor team at **exporthelp@nzte.govt.nz**