

# PERSONAS FOR TECH

## A PROCESS IN 6 PARTS



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## About this guide

Why? – You must be thinking about your buyer personas every time you make a decision about your business, product evolution and your marketing strategy. Do right by those personas and you'll build a bond with the real customers they represent, boosting sales while creating brand loyalty and trust.

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## SECTION 1

### Research your ideal customer / current customers

Some of the key data points SaaS products make easier to collect are:

- ▶ Age
- ▶ Location
- ▶ Language
- ▶ Income
- ▶ Buying behaviour
- ▶ Interests and activities
- ▶ Life stage (such as new parenthood or retirement)

Gather what you can from your customer interactions, and consider confirming and supplementing that information through email surveys, online surveys, Zoom groups, social analytics or even customer interviews.

**Dig into your product logs and website and social analytics.**

**Product Analytics** are an incredible way to see how your customers use your product and where they find value

**Social media analytics tools** can provide a huge amount of information about the people who are interacting with your brand online, even if they're not yet customers.

**Facebook Audience Insights** provides especially valuable and detailed information.

Now do the same with your competition!

## SECTION 2

### Where's the pain?!

- ▶ What problems or hassles are your potential customers trying to solve?
- ▶ What's holding them back from success?
- ▶ What barriers do they face in reaching their goals?
- ▶ What do they want their business to achieve using your solution?
- ▶ What is the **value** they will see in your solution, today?

Try to at least discover a primary and secondary objective for your buyer persona (and detail how they are currently planning for this).

One key way to find out is to engage in some **social listening and social media sentiment analysis**.

## SECTION 2

WHERE'S THE PAIN?!

# Monitor your brand

Setting up search streams to monitor mentions of your brand, products, and competitors gives you a real time look into what people are saying about you online. You can **learn why they love your products**, or which parts of the customer experience are just not working.





## SECTION 2

WHERE'S THE PAIN?!

# Check in with your customer service, helpdesk or sales teams

When getting customer insight, we often forget to check in with customer service, helpdesk or sales teams to see **what kinds of questions they get the most.**

Find out if they can help you identify patterns about which groups tend to face different kinds of challenges.

You could even ask them to **collect real customer quotes** that you can use to help give your audience personas depth.




## SECTION 3

### Where are the gaps they face?

► Where are they lacking, or failing, or where are they hitting a brick wall?

This is generally where your product or service slots in, as a **solution to their challenges**.

While pain points are problems your potential customers are trying to solve, goals or aspirations are positive things they want to achieve.



Remember to ask your sales team to capture actual quotes verbatim that capture the customer experience!

► What motivates your customers? What's their end game?

These goals might be directly related to solutions you can provide, but they don't have to be. This is more about **getting to know your customers** than it is trying to match customers exactly to features or benefits of your product.

Even if your personas' goals don't relate specifically to your product's features, they can form the basis of a campaign, or they might simply inform the tone or approach you take in your marketing.



## SECTION 4

### Understand how your brand can help

Now that you understand your customers' pain points and goals, it's time to create a really clear picture of how your products and service can help. As part of this step, you'll need to stop thinking about your brand in terms of features and **dig deep to analyse the benefits you offer to customers**.

It can be hard for tech-minded people to get out of the feature mindset – which is one reason buyer personas are so important.

They help you flip your thinking and consider your products and services from a buyer's point of view.

Remember: A feature is what your product is or does. A benefit is how your product or service makes your customer's life easier or better.

Ask yourself one question for each of the pain points and goals you've collected:

**How can we help?**

The answers to this question will provide the basis for the key marketing messages you'll craft in the next step.

## SECTION 5

### Turn your research into buyer personas

Gather all of your research and start looking for common characteristics. As you group those characteristics together, you'll have the basis of your unique customer personas.

Here's how this looks in practice. Let's say you identify a core customer group of female product leaders in their 30s who live in big cities, like to run, and own small dogs. Great—now it's time to take this abstract collection of characteristics and turn them into a persona that you can identify with and speak to.

Give your buyer persona a name, a job title, a home, and other defining characteristics. You want your persona to seem like a real person without getting too specific and excluding characteristics that should rightly be considered part of this customer group.

Aim for about the amount of information you would expect to see on a dating site, or what you might learn from a short conversation on an airplane or at a bus stop. Don't forget to include pain points and goals.

## For example:

Your group of dog-owning urban women product owners could be represented by the persona you name Product Peta. Rather than speaking generally about city living and dog ownership, you'll give Peta representative characteristics that make her a real person:

- ▶ She is 35 years old
- ▶ She lives in New York City
- ▶ She works at a tech company
- ▶ She owns a two-year old Chihuahua named Sam
- ▶ She likes to run in Central Park

And so on.

**Remember, a list of characteristics does not equal a persona.** A persona is realistic description of a person who represents one segment of your customer base. This persona represents this customer group to you and allows you to think about them in a human way rather than as a collection of data points.

It's a lot easier to speak to Peta than it is to speak to "women." Or even "35-year-old women who own dogs."

As you flesh out your buyer personas, be sure to describe both who each persona is now and who they want to be. This allows you to start thinking about how your products and services can help them get to that place of ambition.

## SECTION 6

### How to use personas to guide your marketing

Thinking of your buyer personas as real people allows you **to craft marketing and sales messages that speak to real people**. Sales and Marketing teams too often fall into using corporate-speak that incorporates a lot of buzzwords but doesn't really mean anything. It's harder to fall into that trap when you're crafting a marketing message specifically for Product Peta.

- ▶ What questions does she have that your marketing message can answer?
- ▶ What social networks she uses that Sales can reach?
- ▶ What kind of language does she use when she interacts with her friends online?

Thinking of Peta as a real person makes sure you address her priorities instead of your own.

This is where your answers to the “how can we help” exercise come in. For each buyer persona, create one key marketing message that answers this question.

- ▶ How does your product help this specific persona solve their problems and achieve their goals?

Capture that in one clear sentence and add it to your persona template.



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