Reference

Marketing buyer persona template and checklist

Discover why creating quality customer personas can help you prioritize marketing tactics and increase conversion

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Part of the Digital Experience Management Toolkit

CONTENTS

INTRODUCTION

Purpose of this guide

Personas are popular with marketers to understand their core target audiences and improve the effectiveness of communications with them. However, we know it can be difficult to know where to start as they can vary widely in what they include.

Often, we find personas are just a 'thumbnail' of user demographics. While these are useful for a shared understanding of key audiences within a business and to help towards consistency of communications, they are of limited practical value. We believe more actionable personas are essential to inform today's complex marketing communications.

In this guide, we summarize the key features of an effective persona. We start by introducing the benefits of having personas for your marketing, questions to ask to check the quality of your personas using the 'PERSONA' mnemonic, and summarize the key features in a 13-point checklist which you can use as a template for structuring your personas.

As a follow on from this guide, our paid member customer persona guide and template includes a detailed 40-row spreadsheet template you can use to build your personas and different B2C and B2B templates to base your personas on. There is also a 100-slide PowerPoint deck packed with examples of different personas and customer journey mapping approaches which is useful for inspiring how you create your personas.

Recommended paid member template: Customer persona guide and template

We also have the following Smart Insights learning resources to further support your persona research and creation:

☑ Persona research guide

☑ Customer journey mapping template

☑ Define audience personas

☑ Research personas

MARKETING BUYER PERSONAS

What is a customer persona?

A customer persona - sometimes referred to as a buyer persona - is a summary of the characteristics, needs, motivations, environment, and behaviour typical of distinct audience types.

They are a semi-fictional representation of a selection of your customers who contain shared characteristics/needs and should be based on real customer data.

They are typically given a name that shows their association with your business, as the two examples here illustrate.

Mary Stone

'Marketing Responsible Mary'

Senior Marketing Manager within the Real Estate Industry

HR ADVISOR

Harry

Top Tip: Using alliteration when naming your personas can help you, and your team, remember them better!

Why are personas useful?

Customer personas are an essential online branding and conversion tool that help you create more customer-centric, (and less product or company-centric) web experiences. They help you prioritize your marketing efforts by focusing on qualified prospects. Personas can also be used to understand multichannel customer journeys and the paths users take before committing to purchase.

By creating quality personas for your business, you can gain:

1. Improved share understanding of your target audience
2. Knowledge of how to make your website better meet customer need
3. Increased conversions
4. Encouraged integrations with other channels
5. Objective insight to fuel your marketing tactics

Top Tip: The more specific and data-driven your personas, the better quality leads and conversions you'll generate.

What needs to be included in a persona?

At Smart Insights we believe there are three key features to include to create a quality persona. Often businesses focus too much attention on demographics, and forget the other important parts that bring a persona to life:

1. *Demographics* - age, gender and for B2B, buying unit role.
2. *Psychographics* – goals, motivations and device and media preferences.
3. *Content and customer journey maps* - This can include the questions a persona may have when comparing and selecting products during the three stages of the buying process. It may include the websites they visit, searches, keywords, and relevant content to support their decision. To create a quick, actionable customer journey map, we recommend plotting journeys across each part of the RACE Framework with our customer journey mapping template.

On the next page, we've included a high-level example of a persona for Smart Insights.

Top-level persona example

Mary Stone

'Marketing Responsible Mary'

Senior Marketing Manager within the Real Estate Industry

Age - 51

Income - £55k

Education - Master's Degree

Ethnicity - British

Marital Status - Married, 2 children

Business size - Large: 250 employees (manages team of 15)

Location - West London

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Goals
• Create and deliver an effective digital marketing strategy to achieve market growth
• Upskill self and marketing team

Pain Points
• Access to up to date marketing information
• Time-poor - needs help with CPD of team
• Digitally engaging with customers

Motivations for using site
• Research market trends
• Download useful resources/templates
• E-learning CPD opportunities for team

CONVENIENCE	✳ ✳ ✳ ✳	
WEBSITE UX	✳ ✳ ✳ ✳ ✳	
EXPERTISE	✳ ✳ ✳ ✳ ✳	

Channel preferences
Google | LinkedIn | Gmail | Phone calls | Industry events

This is a useful example of how you can present a top-level view of your persona. It summarizes demographics but focuses on the persona's goals, pain points, motivations for using the site and channel preferences, which is important information for guiding your marketing.

As a top-level view, however, it doesn't include content and customer journey maps, which we would encourage you to include when creating and optimizing your personas.

To see more detailed examples of B2C and B2B completed personas (including content and customer journey maps), download our persona guide and template.

Testing the quality of your personas

The better quality your personas, the more value you will get for your business. For instance, if your marketing is targeted around inaccurate personas that do not represent your real customers, you will be missing out on reaching your target market and lose sales and engagement opportunities.

The PERSONA mnemonic is a useful checklist for structuring your persona. Use it to review or structure your personas assessing if your personas are meeting each of the features of a quality persona.

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P RIMARY RESEARCH

E MPATHY

R EALISTIC

S INGULAR

O BJECTIVES

N UMBER

A PPLICABLE

Looking at the persona mnemonic, ask yourself the following questions to quality-test your personas.

P	Primary research	*Is your persona based on contextual interviews with real customers?*
E	Empathy	*Does your persona evoke empathy by including a name, photograph, and product-relevant narrative?*
R	Realistic	*Does your persona appear realistic to people who deal with your customers every day?*
S	Singular	*Are each of your personas unique, having little in common with other personas?*
O	Objectives	*Does your persona include product-relevant high-level goals and include a quotation stating key user need?*
N	Number	*Is the number of personas small enough for the design team to remember the name of each one, with one of the personas identified as primary?*
A	Applicable	*Can the development team use your persona as a practical tool to make design decisions?*

How many personas do I need?

This depends on the resource available to you. Small businesses may want to start with 1-2 quality personas, whereas larger organizations could have many more. It is better to have less, better quality personas that accurately represent your customers, rather than many done poorly.

PERSONA CHECKLIST AND TEMPLATE

The checklist below is structured around the approach we use in our popular customer persona guide and template. It has been designed to give you an overview of what needs to be included in your personas, and to be used as a checklist to review and improve your approach.

Our paid member download includes a detailed 40-row spreadsheet template you can use to build your personas and different B2C and B2B templates to base your personas on. There is also a 100-slide PowerPoint deck packed with examples of different personas and customer journey mapping approaches which is useful for inspiring how you create your personas.

Persona checklist	
Demographics and personal situation	
1 **Demographics:** *Age, gender, and in B2B, member of buying unit.*	❑
2 **Decision making style:** *Balance between emotional, rational and satisficing behaviour.*	❑
3 **Persona content** *Scenario or use case for buyer journey.*	❑
Psychographics	
4 **Goals:** *Main goal of purchase.*	❑
5 **Motivations:** *Triggers for research and purchase*	❑
6 **Barriers and challenges:** *Current and anticipated problems purchase may resolve.*	❑
7 **Device preferences:** *Typical device devices.*	❑

8	**Media preferences:** *Media, publisher and social platform preferences.*	❑
	Content and customer journey maps In our persona template examples, these are provided for top-middle and bottom-of-funnel content.	
9	**Media touchpoints:** *Publishers and digital intermediaries.*	❑
10	**Key consumer decisions:** *Questions that the consumer needs to answer.*	❑
11	**Searches:** *Typical searches for a product of service.*	❑
12	**Key content:** *Content types and features..*	❑
13	**Interactive tools:** *Relevant digital tools.*	❑

Ready to start creating quality personas?

Now you understand what personas are and the benefits of using them for your marketing, it's time to get started.

Whether you are beginning from scratch or looking to optimize existing personas, our customer persona guide and template covers everything you need to create quality personas, including how to go about customer research and how to present your personas with an editable template.

Download our customer persona guide and template