



SALES + MARKETING

ALIGNMENT

WORKSHEET

Collaborative Prospect & Persona Creation Worksheet

How To Use This Worksheet: 5 Simple Steps

1. Gather a mixed group of both sales and marketing team members, as well as anyone else who has valuable information and insights about your target market, leads, prospects and customers. Try not to let this group get too large; 3-5 people is ideal.
2. Print a copy of this worksheet for everyone in your group. Maybe provide some pens, too.
3. Make one member of your group responsible for taking the master set of notes. Go through the questions on the following pages together.
4. When you're finished, make the notes available to everyone.
 - Marketing: Use the information to [create a buyer persona](#) and also generate ideas for targeted content and campaigns.
 - Sales: Use the information to create custom views in the HubSpot Prospects tool, subscribe to updates. Then begin using [Sidekick Connections](#) to be introduced to contacts at prospect companies and [Sidekick Sequences](#) to nurture them through the sales funnel.
5. Sales and Marketing bask in the glory of aligned efforts founded on a shared understanding of their personas and prospects.





Defining Prospects: Company Information

Industry

What is the broad industry category?

What is the niche or specific area of focus?

Location

What location criteria is important to us?

City, State, Country, County, Postal Code, Area Code, Time Zone, Region, etc.

Company Size

What are the maximum and minimum parameters for number of employees?

What are the maximum and minimum parameters for annual revenue?

Other Information

Does it matter to us if these companies are public or private?

Does it matter to us what year these companies were founded?

What other information would be helpful for Sales to know about prospects?



Defining Personas: Contact Information

Personal Background

What do we know about these individuals? What is their typical background?

Title, Education, Career Path, Age Range, Family and Social Life, Hobbies

Demographics

Do they tend to be male or female?

*What is their average income range?
Personal and Household.*

Where do they typically live and work? In a specific geographic area? In an urban or suburban environment? Alone or with a lot of other people?

Goals

What is this person's primary goal?

What is this person's secondary goal?

Challenges

What is this person's primary challenge?

What is this person's secondary challenge?



Defining Opportunity: Align Sales & Marketing

What can we do

...to help this persona achieve goals?

...to help this persona overcome challenges?

Where are they?

What social media platforms do they use most often?

Where do they go for content?

What companies, brands, influencers, thought leaders do they trust?

Common Sales Challenges

Why would they say no to our company?

Why would they choose a competitor over us?

What are their common questions/FAQs?

What is the hardest part of this sales process?

Success with this persona

What tactics have been most successful so far?

What communication styles are most effective?

What offers resonate most with them? (i.e. discounts, content, thought leadership, sense of urgency, freebies, etc.)

