



Video 1: The Importance of Buyer Personas

Ali Saffari: Really invest in your persona definitions. We believe that the more you invest at the beginning, the more you're gonna benefit from that during the journey. So it's very easy to say, "Okay, now we have a persona, let's start." But it's important to take your time and go and actually to call up a couple of your customers, and see how they fit to that persona definition. You might end up with a couple of surprises.

Hey, it's Kyle from HubSpot Academy. One of the most important things your company can do is get a clear definition of who your ideal customer is. And this definition needs to be developed jointly between marketing and sales. Otherwise, you're going to have trouble. Here's Dan McDade, President and CEO of PointClear:

Dan McDade: I know years and years ago we were doing a project for a company and the marketing group was marketing \$10 thousand point solutions and sales was only interested in selling \$1 million enterprise solution and literally the company went through \$100 million of venture capital, they actually happened to be up in your area, they went through \$100 million of venture capital sold in a fire sale to another company and basically nobody's ever heard of them and they had probably the best solution for their space at the time. So you just want to make sure that you're doing the right job as far as qualifying the market, identifying what the definition of a lead is, and as simple as that sounds, if you go ask, you know, six marketing people and six sales people in the average company what's the definition of lead, you're gonna get 12 different answers, and that's unfortunate.

If you want to sell efficiently at a higher velocity, you have to have a deep understanding of the people who tend to buy from you. A great way to get that understanding is to create a buyer persona. A buyer persona is a semi-fictional representation of your ideal customer based on data.

Now, if you've put any effort into defining a qualified lead, you probably have some sort of ideal customer profile or a checklist of the most basic attributes someone needs to have in order to be successful as your customer. An ideal customer profile is a great starting point for your persona development, but it isn't a persona. Ideal customer profiles identify a category of people, and within that category there are usually subcategories. And that's where personas come in.



To give you an example of how the two relate to each other, let's take a look at Spotted Media. Spotted Media is a company that turns paparazzi photos into Facebook and Instagram ads for consumer brands.

Janet Comenos: We're the first company in the world that can allow brands to legally advertise with real life photos, real life paparazzi photos of celebrities actually using that brand. So, prior to Spotted, it was not something that a brand could do, you know? If you're a marketing executive at Mercedes Benz and you see a great photo published in People magazine of Leonardo DiCaprio getting out of his Mercedes, you can't just take that photo and use it for advertising purposes. We're the first company to enable this for brands.

That's Spotted Media's founder, Janet Comenos. One of the first thing she did as she was starting the company was she defined Spotted's ideal customer profile. If you've watched the sales enablement class on lead qualification, you know the five qualifiers in Spotted Media's ideal customer profile: (1) consumer brands that (2) produce a product that's discernable in a photo and are (3) investing heavily in media and (4) executing that media in-house and (5) have at least 1,000 employees on LinkedIn. That's a solid ideal customer profile, but Janet soon realized that they needed something more specific — they needed personas.

Janet Comenos: I think we realized over time that there were certain individuals within the brand who are measured on KPIs that we could help them achieve. It tended to be more upper funnel folks who are focused on driving brand awareness, in our case. We mapped out the series of titles that this included, everyone from the CMO to the head of media to the head of display advertising. Then, what we do is we were very maniacal about the way that we map out our personas. We actually ended up being able to pull a lot of this information directly from LinkedIn because if you go to LinkedIn to look for job posts for, let's say, Mercedes Benz or Chanel has posted, you can see the daily responsibilities of these various individuals. You can see the things that they're going to be measured on. For all of the, roughly, let's say 15 roles of people we target at the brand, we map out what are their daily responsibilities and typically three or more bullets there are helpful. How can Spotted help them accomplish these daily activities easier? How can we make their life easier on a daily basis? What are their longer term goals? Some of that has to be garnered from a first call. It's not immediately apparent online, typically. Then, how can Spotted help them accomplish those longer term goals? Then, how can Spotted help this person get promoted?



So Spotted started with an ideal customer profile, and that identified a certain kind of company. If you're in a B2B space, your ideal customer profile probably will be at the company level. Your personas will then be the individual people who work at those companies. Notice how Spotted discovered 15 different personas that they might need to work with at these big consumer brands they're selling into — and I love how they used online job listings to figure out the metrics those personas are accountable for. Listen to how they use that information:

Janet Comenos: What we do is, when we have those 15 personas, everyone from CMO to head of media to head of global advertising, after we've done the persona mapping where we map out their daily responsibilities and their long-term goals, then what we do is we rank them in terms of budget, influence within their organization, and alignment with our solution. It seems like a lot of work but if you do it once, then portions of this end up becoming the basis for your email outreach. We look for ... if we're looking to reach out to someone in charge of media at Tommy Hilfiger, then we look at our persona map and we see, "Okay, what's the language that we've used in our persona mapping doc to describe how we can help them do their daily job better and how we can help them further their longer term goals and how we're going to get them promoted." Then, that is the exact language that we use in our cold email outreach and our voicemails. It becomes the basis for that outreach.

That's why you need buyer personas. If you understand your customers well enough that you can help them get promoted, they're going to love you for that. They're going to want to buy from you — and not just once, but over and over again. And if you're using the same language that their employer uses in their job description, you're going to be positioning your services in a way they can understand.

If you're in B2B sales, your ideal customer profile will define which companies are a good fit for your offering, and your buyer personas will define the people at those companies who you need to work with. Let's say you're a recruiting agency that targets healthcare companies with less than 10,000 employees. If your agency specializes in recruiting salespeople, then you would likely be targeting the VP of sales, the director of recruiting, and the CEO at those healthcare companies. You would then have one persona for each of those three roles: VP of sales, director of recruiting, and CEO.

Now, if you're in a B2C space, you might be wondering how this applies to you. Don't worry— it definitely does! Your ideal customer profile be some broad category of people, like prospective homebuyers or expectant parents. And then your personas will

describe specific kinds of people within those categories: Within the ideal customer profile of prospective homebuyers, you might have personas for first-time homebuyers, people who are downsizing, people who are upsizing, and investors looking to buy rental properties. Within the category of expectant parents, you might differentiate between first-time parents and parents with other kids at home as well as differentiating between adoptive and biological parents. Even though every persona fits within your ideal customer profile, the needs and behaviors of each persona might be very different.

So to recap, your ideal customer profile will broadly describe your target market, and your personas will define the specific sorts of people in that market. If you're a B2B company, your ideal customer profile will probably be at the company-level while your personas will focus on specific roles within that company. Regardless of what space you're in, you'll want to start by creating your ideal customer profile and then define your personas based on the sorts of people included in that profile. And then you'll be able to accelerate your sales process by better meeting the needs of the people who match those personas.

Video 2: Developing Your Buyer Personas

If you have your ideal customer profile already figured out, you're in a good position to start creating personas. However, even though ideal customer profiles and buyer personas are closely related to each other, the process for developing them is surprisingly different. Your ideal customer profile can be created in a meeting between marketing and sales. Just bring the right people into the room, look at some past sales data, and start making a checklist. Personas don't work quite the same way. Here's Todd Hockenberry, Owner of Top Line Results:

Todd Hockenberry: Really understanding your persona and really understanding their issues, and that doesn't happen in your conference room. That happens in the field, face-to-face with those customers, asking them those questions, being on the phone with them, making sure you know from their perspective, not yours, exactly why people buy from you. It's a fundamental thing.

In order to define your personas really clearly, you need to talk to the people those personas represent. Remember, Spotted Media started out with job postings, but Janet said the daily challenges and long-term goals had to be garnered from actual phone calls. Similarly, your persona research should start with data you can find online or in your own customer records, but eventually you'll need information that can only be gathered by asking people directly. When Spotted first starting doing this, they didn't



have any existing customers, so they asked these questions on sales calls. If you have a sizable customer base, you should start by talking to people who have bought from you in the past.

If you are basing your persona research on conversations with sales prospects, make sure you allow yourself the flexibility to change those personas over time. Someone might seem like a really good fit for your offering before they buy, but you won't know for sure until they become a customer. Here's Jen Spencer, who at time of interview was Vice President of Sales and Marketing at a startup called Allbound:

Jen Spencer: I dug a little bit deeper into, okay, who are these people that we think that we're going to be selling to? Then I immediately started building out those buyer personas and getting in front of those individuals, interviewing them, and then being on all those sales calls. As I started taking more and more sales calls, and as we really started figuring out what part of the market we wanted to serve, those personas definitely changed. There was one persona in particular that our CEO was convinced we were going to be selling to that a month in I said, "No, this person is maybe a user of our software, but this person is not a decision-maker at all." I think it was just we had to go through the sales process a few times to figure that out. Then, it was we started bringing on customers. There were some customers that we really, really liked working with. We just gelled and connected. There were other customers where I was like, well, we can solve their problem, but are we really speaking the same language? We started adjusting the personas to fit the type of people that we knew we would work really well with, because the people we would work really well with would be very successful using our platform. As a start-up, what was most critical to us was keeping those customers because our customer acquisition cost was, and still is, extremely high being that we don't have this critical mass of market share out there.

Regardless of whether you're interviewing prospects or customers, you can make excellent progress by asking a few questions to just a few people. Here's Todd again:

Todd Hockenberry: We do a lot of persona interviews. We interview customers and prospects of our clients. The data showed that you could get about 80% to 90% of all the insights you're ever gonna get with as little as 15 interviews. So, all of a sudden, if you have a thousand customers, you don't have to ask them all. If you can just come up with a representative list of 15, you're gonna get 80% to 90% of the learning that you're gonna get, so it's really a manageable thing to do. Companies that don't do it, I think, miss a big opportunity. At least



the companies I see. It's rare, I would say, that companies go to that level that they're doing kind of regular interviews, to make sure they understand exactly, from the customer perspective, what value they see.

So start by identifying 15 people you can sit down and interview. And then ask them all the same questions — you might even consider scripting the questions so you make sure you ask them the same way to each person.

So what should these questions be? Here are some suggestions from Todd:

Todd Hockenberry: We're gonna ask them, how did you find out about us? How did you become aware of this problem? How did you research? How did you learn? Where did you go for information? What resources did you access? Trying to understand when the process started, what kicked it off, why did you decide to buy this? Why did you decide to change your service provider? Why did you decide you needed this new piece of equipment? What started it? And a lot of times it's straightforward, but other times there's a lot of insight that's found in that transition. I think we ask a lot of questions about how they make those decisions, who was involved. How did they interact? What kind of information did they use? What were their buying criteria? Did they have a decision kind of tool that they use to make the decisions? Was it gathering information online? Was it doing interviews? How did they go through the whole process of making the decision? And then what were the criteria they used to shrink down the list and the consideration stage on the right options or the right direction. And then after that, to which company they wanted to work with. I think there's a lot of questions around the use of the solution or tool or service. What is the impact on the business? What are their expectations of what it's gonna do? Once they bought it, how did that process play out? How did they kind of transition to using the solution? And then kind of follow up results after that. To me, I'm trying to understand who's involved with the decision, how did they make this decision, and what's their process of going through the steps. Whatever questions you think that match that are good ones.

In short, you need to ask the questions that are going to help you understand who it is that's buying from you. The specific questions you'll ask should be brainstormed between your teams, but there are four main topics you want to ask questions about:

- Goals — What is this person trying to accomplish? How do you help them achieve these goals?
- Challenges — What holds this person back from accomplishing their goals? How do you help them overcome these challenges?

- Watering holes — Where does this person learn new things related to their job? Are there specific publications they read or podcasts they listen to or conferences they attend? How can you make yourself present at these watering holes?
- Shopping preferences — When they buy something related to their job, what does that process look like? Who's involved? At what point do they expect a salesperson to get involved? Or, do they prefer to buy things entirely online without a sales rep being involved?

So choose 15 customers, ask them your questions, and combine the results with the data provided by your ideal customer profile. This will give you a rich description of the kind of person you can be a hero to. Even though the information in the persona will be based on information from multiple different people, it should sound as though it's describing a single individual. Find a picture that matches that person and give it a name, and then you'll have a name and a face to help you visualize your ideal buyer — and that's what a persona is.

Once you've created your buyer persona, make it a guiding part of your sales and marketing strategy. There are lots of uses for a well-crafted persona. It can direct the sorts of content and event products you produce and where you promote them and how you position them. It can guide your sales team to focus on the points that will resonate most with their prospects and help them build credibility. Here's Ryan Burke, SVP at InVisionApp:

Ryan Burke: I'm Ryan Burke, Senior Vice President of Sales of InVision App. We're a design, prototyping, and collaboration platform. It's obviously really important to identify who your core customer is, but also the other thing that I think that was interesting that we did is, early on, we thought about hiring a sales engineer to help the sales team, but instead we hired our target persona. We hired a designer for our sales team. He was sort of our sales engineer because he knew all the tools, he knew the internal processes, the ecosystem. He was enormously valuable in helping us frame our message to ultimately what our target persona was going to be externally. He was enormously helpful early on. He would jump on calls and sort of had instant credibility with our prospects and customers because he was in the trenches with a lot of the issues that they were facing themselves. Enormously valuable to do that. Maybe that doesn't relate to every industry, but for something like design where it's very nuanced from a tool perspective and where they sit in the organization, it was enormously powerful for us.



If you know your persona well enough that you can go out and hire them, you are well ahead of the curve. And actually, you might not have to go out and hire someone new — if your own company resembles your ideal customer profile closely enough, you probably already have your persona on staff. Here's Bertrand Hazard, Vice President of Marketing at TrustRadius:

Bertrand Hazard: We are selling something, which, ultimately, is ... I am the persona. I'm the VP of Marketing, so I'm the persona that we are targeting. Why don't I go and try to sell that to people I know in my network and my industry?" And I actually closed the first few deals ... Not the only one, but I have to close some of them, and it helped me to do a few things. Remind me how hard sales is, because nobody likes to be rejected. That's the one thing. Nobody likes to be rejected, but it also helped me understand, again, what our prospective buyers and future customers, how they were describing what they were doing, it helped me shape the messaging. I was able to get a few of our, now, some of the bigger customers that we have, but I was also able to do a better job at messaging and then dealing with going to market that is aligned with the market. And honestly, sometimes, I miss it!

To recap: A buyer persona is a semi-fictional representation of your ideal buyer based on data. Some of that information may come from external sources such as job postings or internal sources such as past sales information. Some of that data will come from interviews you have with real-live people. And then you bring all that data together and give it a name and a picture, and you have a persona that embodies your ideal customer. Once you have that, everything your company does should be focused on being a hero to that person.

Here's a final thought from Bertrand:

Bertrand Hazard: I mean, I'm just thinking, again, if you're a marketing guy today and you're not spending any time with your prospective buyers or customers, you're not a marketing guy because you're not part of sales; you're part of your own world. To me, the core of what a marketer should be doing is really being in the field and spending some time talking to prospective buyers and defining what these personas are ... But do it conjointly with sales. And also, adjust, right? I mean, we don't live in a static world. It's changing all the time, and you're learning new things all the time.

So get out there and start talking to your customers. Get to know them. Get to understand their needs. And then go and be their hero.