

Candidate Persona Profile	Priority Initiative	Success Factors	Barriers	Decision Criteria	Candidate Journey
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Persona Name		Industry, Geographic or Other Segments	
Role		Reports to	
Education		Solutions they use in their daily job	

#### MY RESPONSIBILITIES

- Effective planning and implementation of marketing content
- Establishing and adjusting strategies to meet goals
- Engaging in business partner relationships with clients and/or cross-functional resources
- Project management, executing reporting and presenting results
- Delivering work product and staying current with industry standards and trends.

#### HOW I AM EVALUATED

- Knowledge of marketing project workflow process and digital process lifecycle
- Attention to detail and accuracy
- Quality of written, presentation and verbal communication skills
- Knowledge of digital and social media analytics
- Budget management, metrics and reporting, especially demand generation
- Ability to work as a member of a persuasive and effective team

#### INFORMATION RESOURCES I TRUST

- Business professionals (peers)
- Consultants
- Internet / websites
- Business social media
- Events / conferences
- Personal social media

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## What business conditions trigger this candidate's decision to look for a new email marketing solution?

### Agency decisions are triggered by the requirements of new customers or newly targeted segments

We were looking for a solution that would be a better fit for the leads we were starting to see from small-to-medium-sized businesses. These smaller companies were going to be good clients for us, but they weren't going to have the budget for the setup costs that our existing solution required. High upfront costs would be such a barrier that we might not win their business.

Our client was doing email through an agency, a copywriter who sent the emails for them. But my client didn't have any insight into the data or statistics. I said look, you should really be far more on top of this and let's look for an appropriate system for you guys.

### Decisions by in-house marketers are triggered when the company has a new focus on digital marketing

The CEO decided that we needed to get serious in the digital space. He hired a new VP of digital strategy and innovation, who came up with a vision for how to make it work for the 7 companies we owned.

As a content producer and curator, I thought it would make sense that once a month, and only a once a month, I would create a newsletter that would have only "the best of the best" and send it to my followers, customers, and prospective customers.

Our sales were starting to flatten out a little bit so we were talking about different ways that we could help our sales force

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**What results or outcomes does this candidate persona expect from a new email marketing solution?**

**It will be so simple that infrequent users won't need training (Agency)**

We need something that isn't complicated to setup and operate so we can have a partnership with the client. If they want to do a little bit more themselves, that should be an option. With our current, more robust solution, an untrained marketer won't be able to get in and operate it.

It should be easy to make segmented lists, look at the statistics, and send out the emails. Something where you can't really make mistakes.

For many of our clients, this is not a daily thing to do. They don't have marketing departments or someone who has this as a job. Many have someone who does a once-a-month or once-a-quarter mailshot.

**I'll have a single, comprehensive view of my customers, including what they're doing and saying**

I want to know if the person received the e-mail newsletter and acted on it, and ideally, I want to tie that into a social CRM system.

We don't want to look at different systems to get the perspective of our customer and what they're doing, and the conversations we're having.

**I'll have a solution that can grow with me as my needs change**

We want to be able to grow into a solution if we need to. We obviously have that initial need that we've got to solve today. But what if there are other needs next week or next year? We don't want to be moving solutions.

**I'll have complete control over the content of automated responses**

I've got an offer— say a PDF of a free report. Just give me your name and email. The confirmation email should say, "Thank you for signing up. And here's the thing that you asked for." Right there, with no additional steps.

We want transactional support for emails that aren't about marketing or promotions. You place an order and you get a confirmation, or you contact us and get a reply that says, "We'll respond to you in 24 hours."

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**What attitudes or concerns prevent this candidate from investing in email marketing? Or why wouldn't they purchase it from you?**

#### **We're not sure that we can trust you**

I was dissatisfied with all of the choices, so I just didn't do anything. And then your solution came along, and it could do everything. But it was brand-spanking new. I don't want to be on the leading edge, so I'm waiting six months to a year to see if you are still around.

I have a problem with my clients, because they've heard about your competitors. But when I say, "this solution will do everything that you need to do," they haven't heard about you, and they say, "Gee, I don't know..."

#### **To get the result we want, your templates require users to know HTML**

We would need to help our client build an HTML template, and the whole idea is to make them more independent.

#### **I can't accept your opt-in policies and email responses**

When my customer opts in, I want them to experience instant gratification, building trust by attaching the offer to the confirmation email. Your solution can kind of do that, but not well. I have to send a second email and attach it there.

I should be able to import my list into my new email solution without forcing everybody to go through another round of confirmation. I think it's impolite and rude to ask people who have already opted in to go through it again.

Given that we already have their permission, we don't want to use a provider that will ask for their permission again. There is a danger that they won't accept it or won't remember.

#### **I'm concerned about being blacklisted**

The problem is when you start sending out a bunch of email through your own server, all of a sudden you find your address being marked as being a spammer.

#### **I don't want one more system to manage**

I get worried about how many systems I'm going to have to manage and look at. I'm concerned about how many I'm going to have to keep track of in order to really understand my customer and prospect. It scares me.



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**Which features of email marketing does this candidate evaluate as they compare alternative approaches / vendors and make a decision?**

**I want ease-of-use, which means that I can figure it out on my own and it works like other software I regularly use**

Of course it's easy to use. Everyone's saying theirs is easy to use. So it is a major criteria for me to see which one allows me to get to my goal before I have to consult help or call anybody. If it's easy to use, then I should be able to figure it out.

When I want to add a new piece of content, add an image or a video, I want to simply drag-and drop.

I expect very little complication in terms of the backend work that I have to do to configure it. And another thing, I expect APIs and hooks into other systems such as social CRM systems for seamless integration.

**I expect a lot of easy-to-customize templates, updated frequently**

The first thing I look for is templates. I want a solution that has a lot of templates and is always adding more. I want to see at least five newsletter templates that are easy to use.

I expect templates that are integrated into the plugins, so that someone could just create the newsletter within the plugin, format it quite easily, and add a photograph. That is quite important, because it means that at some point my customer won't need to rely on me to do it for them.

I don't want to spend money for someone to build our templates. I want to be able to repurpose something, take something that's there that I really like and be able to customize it.

**I won't trade off ease-of-use to get automated response capabilities**

There are email marketing platforms that don't have the logic built in to do email marketing automation, so although they might be easy to use and low cost, they don't have the complexity of being able to setup behavioral rules to automate your marketing. So those are out.

**Agency: It needs to integrate with a wide range of web and CRM platforms**

I need one that has at least a handful of integrations for the big guys that are used across industries.

There is one that is an awesome tool, but you have to use it with WordPress. So it's limited, it wouldn't apply to all of our clients. Or, it wouldn't have the integrations with some of the CRMs our clients need.

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**What is this candidate's role in the decision and who else will impact the decision? What resources will they trust to guide the decision?**

**I'm familiar with many solutions and prioritize those where I have experience**

I know a lot of options because we have worked with lots of systems for many clients. So I simply ask myself, "What are my two favorite options to propose to them?"

The new VP has some experience, so he knows what he wants to do and which vendors will get us there.

I ask people in the company what solutions they know about. Then I use Google to find more. But those that are mentioned are the most interesting.

I expect web access to basic prices I appreciate being able to go to a site and look at features and pricing. Pricing isn't the only factor, but I dislike having to hunt for it or pick up the phone. I'm not even sure I want to talk to someone yet. I have grown up in the [fast] model of software services and I just want to know: is this \$1,000 or \$100,000?

**I need to see it and use it before I decide**

I'd say the websites are all about the same. What really helps is using it.

We want to see the product in a online demo and walk through it. We want to see it from the back end or the administrator's side so that we know what it will take for us to run it. We want to see a lot of features and capabilities, plus some cool use cases.

**I'm calling to get answers, sure, but mostly to test your responsiveness**

I called and asked them a few questions and that was another criteria. Are they easy to talk to and do they make sense?

I did call each of them, as well. Because one thing's that's really important to me is when I need support, I don't want to be doing e-mail and I don't want to be doing chat; I want to call somebody.

**Agency: Clients defer decisions to us**

I tell the office manager "These are the three, let's look at the differences." She had Googled some others. I said, "Look, I know these systems and I'm gonna help you in the future. It might be easier to choose the system that I know very well." She went with what I advised.

**In-house: We have a team that's working on the assessment, but I decide**

We worked as a team with a couple of people from marketing, product management, development and the ecommerce marketer to decide on the features and functionality. We took a couple of days to do that together and came up with a bunch of requirements. We put it into a tool that will allow us to track the vendor responses and where we are in the decision.

# CANDIDATE FUNNEL

## PRE-FUNNEL

PRE-FUNNEL

Organic Social Copy  
Paid Social ads Copy  
Organic Search Results Copy  
Paid Search Ads Copy

Display Ads Copy  
Placed Article Copy  
Word of Mouth  
Videos

Pay Per Lead (PPL)  
Purchased Contact List  
Lookalike Audiences

## AWARENESS

TOFU

### Issue Identification

Educational Posts  
Top Ten Lists  
Useful Tools

### Employer Fit

Blog Articles - Topics  
Whitepapers - Topics  
Printables - Topics  
Videos - Topics

Webinars - Topics  
Infographics  
Web Copy

### Search for the Position

Blog Articles - Features  
Whitepapers - Features  
Printables - Features  
Videos - Features

Webinars - Features  
Web Copy

## CONSIDERATION

MOFU

### Evaluate Job

Cost Calculators  
Employer Comparison Checklist  
Employer Comparison Worksheet

### Research Employer

Retargeting Ads  
E-Course  
Case Studies  
Series  
Testimonials

Use Case Studies  
FAQs

## DECISION

BOFU

### Application Submission

Brochures  
Employer Comparison Matrix  
Free Trial Registered  
Resource Pack

Qualifying Quizzes  
Product Tours  
Hire Sheets  
Employer Comparison Guide  
Interview Follow Up  
Interview Email Workflows

### Scheduling & Rel. Building

Sending something after the interview is signed up for.  
Like a follow up with info to know before the interview.  
Give an incentive for signing up  
Send Reminders

# CONTENT INCLUDES



- Resource List
- Ratings
- Hidden Thought
- Research Focused
- Series
- Job Spotlight
- Mini Case Study
- Industry Spotlight
- Now and Then
- Shopping List
- Opinion
- Reasons
- Infographic
- Podcast Post
- Video Post
- Stats Piece/Brief
- Quote Based
- GIF Post
- Quora
- Reddit
- Trend Pieces



# CONTENT INCLUDES



- Newsjacking
- Pop Culture Tie In
- How To (*at least 3 steps*)
- 10x (long as HEEEEELL)
- Example (*at least 3*)
- Fight Club
- Q+A (*can be faked*)
- Why
- Comparison/versus
- Roundup
- Metaphor
- Personal Story
- Predictions
- Fails!
- Guides
- Worksheets
- Templates
- Checklists
- Podcast
- Comics
- Cartoons

# CONTENT INCLUDES



- Tear sheets
- Listicles
- Diaries
- Infographics
- One Graphic
- Diagram
- Meme
- Posters
- Cartoons
- Screenshots
- GIFs
- Illustrations
- Handwritten things
- Polls
- Surveys
- Quizzes
- Webinars
- Presentations
- Photo Galleries
- FAQs
- Recaps (events/twitter chat)
- Placed articles
- Press releases
- Video