

EMEDIA  
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# The Customer Persona Worksheet

The #1 Secret To Effective Marketing That  
Will Supercharge Your Results Immediately

**The Customer Persona Worksheet**

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// INTRODUCTION

# The Customer Persona Worksheet



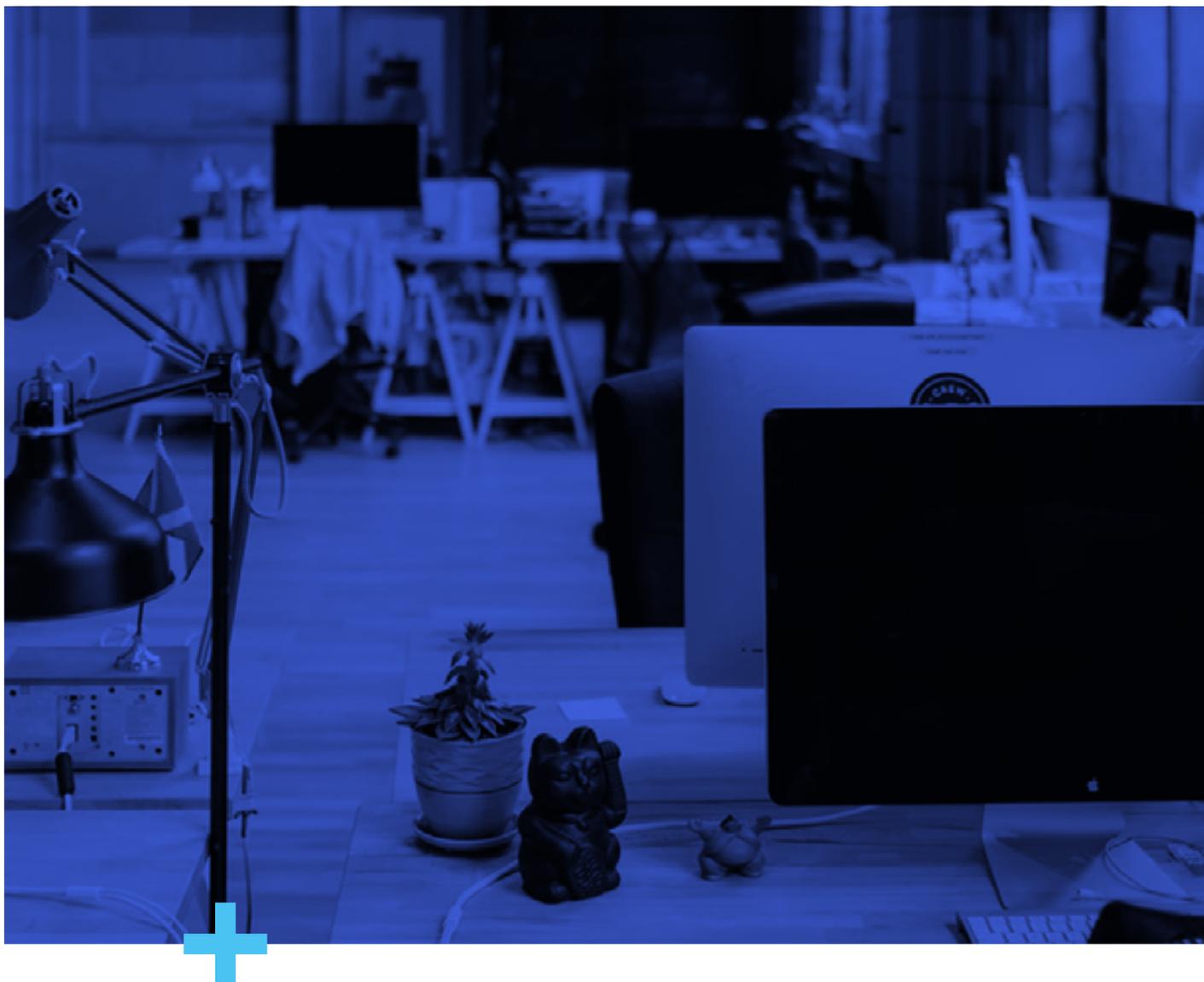
**The single biggest mistake business owners make in marketing:**

Without a doubt, the biggest and most common problem we've found working with our clients is that they don't have a Customer Persona to help shape their communications. PAY ATTENTION! Your perfect customer or client is not everyone! Spend the time to go through this worksheet and the results will change your business forever.

**Marketing Personas have transformed hundreds of businesses and helped to align their sales and marketing teams with stronger leads and conversions every single time.**

Commit to completing this worksheet and stop wasting money on marketing to the wrong people today. If you need help creating your persona, reach out and speak to our team.

**It's time to Supercharge your results!**



# It makes sense. Right?...

**“To market a product or service properly, the first thing you must do is get clear on WHO your ideal customer is, where they are hanging out, what their challenges are...”**

You know building a customer persona (some call it a buyer persona) would have a huge impact on your marketing.

But how?

We'll get into the how-to in just a second, first understand what a customer persona is...



THIS EXERCISE WILL IMPACT VIRTUALLY  
EVERY ASPECT OF YOUR MARKETING AND  
SALES PROCESS



// PART 01

# The Swiss Army Knife of Marketing

# 01

# The Swiss Army Knife Of Marketing

**This exercise will impact virtually every aspect of your marketing and sales process including...**

## Content Marketing

What blog posts, videos, podcasts, lead magnets, etc. should you create to attract and convert your persona?

## Social Media

Which ad platforms should you buy traffic from and what targeting options should you use?

## Product Creation

What solutions is your persona searching for?

## Copywriting

How should you describe offers in your email marketing, ads and sales letters in a way that compels your persona to buy?

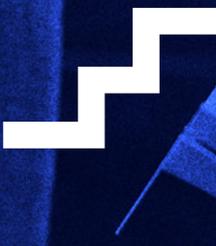
## Email Marketing

Which persona should receive a specific email marketing campaign?...and that's just scratching the surface. Any part of the marketing and sales process that "touches" the customer (which is pretty much EVERYTHING) will improve when you get clear on your customer persona.

After all, it's a person that buys our product and services. It pays to get clear on the characteristics of that person, so you can find and present them with a message that moves them to action.

Let's look at an example customer persona...





// PART 02

# Meet Agency Eric

# 02



# Meet Agency Eric

In April of 2015, Emedia Creative introduced a new offer. We began selling a new type of digital marketing training product: Certification Classes. These new trainings include exams, certificates and badges. A new product means a new ideal customer.

**And, a new ideal customer means a new customer persona must be built. We defined 4 distinct buyer personas:**

## The Marketing Freelancer

interested in training and certification to distinguish herself from the other freelancers she is competing with in the marketplace.

## The Marketing Agency Owner

interested in training and certification to add to the services he can offer his clients and to sharpen the marketing skills of his employees.

## The Employee

interested in training and certifications to distinguish himself at his place of employment or to secure a new job or promotion within his existing job.

## The Business Owner

interested in training and certifications to sharpen her own marketing skills and the skills of her internal marketing team members.



**AS A RESULT, FOUR NEW "CUSTOMER PERSONAS" WERE BORN. ONE OF THESE PERSONAS IS KNOWN AS AGENCY ERIC.**



## Customer Persona

**Age:** 40

**Gender:** Male

**Marital Status:** Married

**# / Age of Children:**

2 (Age 8 & 10)

**Location:** Sydney, Australia

**Quote:** "I Surround myself with people smarter than me."

**Occupation:** Digital Marketing

**Job Title:** CEO / Founder

**Annual Income:** \$150,000

**Level of Education:** MBA

**Other:** Spends time on LinkedIn looking for talent

LET'S HAVE A LOOK AT THE DIFFERENT COMPONENTS OF THE AGENCY ERIC CUSTOMER PERSONA AS AN EXAMPLE

## Agency Eric

### Goals & Values

#### Goals:

Eric wants to...

- Increase agency business
- Increase the capabilities of his team
- Scale his business

#### Values:

Eric is committed to...

- Professional development for him & his employees
- Providing value for his clients
- Using "white hat" marketing principles

### Challenges & Pain Points

#### Challenges:

Eric is challenged with...

- Scaling his agency business
- Finding, training and retaining top market talent
- Keep his marketing skills sharp while being CEO

#### Pain Points:

Eric' pain points are...

- Fear of losing business to competitors
- Fear of his agency falling behind the digital marketing scene

### Sources Of Information

#### Books:

Good to Great / Think & Grow Rich

#### Magazines:

Wired / Fast Company

#### Blogs / Websites:

AdAge / DigiDay / Social Fresh

#### Conferences:

Australian Digital Summit / DigiMarCon Australia / Inbound

#### Gurus:

Jay Baer / Joe Pulizzi / Christopher Penn

#### Other:

Spends time on LinkedIn looking for talent

### Objections & Role Purchase Process

#### Objections to the Sale:

- Does the training fit an existing service or a new service he can offer to his clients
- How long he and his team member will be "out of pocket" doing the training

#### Role in the Purchase Process:

Eric is the decision maker. He buys digital marketing training to keep and his team sharp. He's not worried about the price point if he knows the training will give him and his team an edge in the marketplace

// PART 03

# Customer Personas: What To Include



# Customer Persona

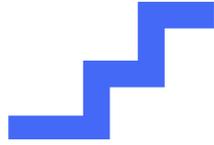
There are 5 major components to the customer persona. In some cases, you'll need to survey or have conversations with existing customers to accurately flesh out your customer persona.

In other cases, you'll be intimately familiar with the characteristics of your ideal customer, or your sales team will be a good source of knowledge.

In any case, move forward. Don't wait for surveys or interviews to be conducted to create your first draft of an persona. Make assumptions where you have no data or feedback and put it on your short list of to-do's to complete your research.

In the meantime, you'll begin getting benefit from an persona built from the assumptions you've made. "Customer Personas" were born. One of these personas is known as Agency Eric.





# Let's look at each section of the Customer Persona Worksheet in turn...

## Step 01

### Demographic Information

**Age:** 40

**Gender:** Male

**Marital Status:** Married

**# / Age of Children:** 2 (Age 8 & 10)

**Location:** Sydney, Australia

**Quote:** "I Surround myself with people smarter than me"

**Occupation:** Digital Marketing

**Job Title:** CEO / Founder

**Annual Income:** \$150,000

**Level of Education:** MBA

**Other:** Spends time on LinkedIn looking for talent

Applying demographic information will **bring your customer persona to life**. While the usual demographics are critical, the exercise of filling in the 'Quote' field can be particularly helpful to "get inside the head" of your ideal customer.

The demographics are another useful part of the Customer Persona when choosing targeting options in ad platforms like Facebook.

And, when writing content, email or sales copy it can be beneficial to simply write as though your persona were sitting across the table from you. Demographic information like age, gender and location will give your persona a look and feel.



## Step 02

# Goals & Values

### **Goals:**

Eric wants to...

- Increase agency business
- Increase the capabilities of his team
- Scale his business

### **Values:**

Eric is committed to...

- Professional development for him & his employees
- Providing value for his clients
- Using “white hat” marketing principles

We begin with the goals and values of your ideal customer.

Make note of the goals and values that are relevant to the products and services you offer. You'll use this information to drive product creation, copywriting, content marketing and email marketing.

We know, for example, that Agency Eric is interested in “increasing the capabilities of his team.” As a result, we could draft an email to this persona that promotes our Content Marketing certification with the subject line: Need Content Marketing training?

That should get Agency Eric's attention.



## Step 03

# Challenges & Pain Points

### **Challenges:**

Eric is challenge with...

- Scaling his agency business
- Finding, training and retaining top market talent
- Keep his marketing skills sharp while being CEO

### **Pain Points:**

Eric is pain points are...

- Fear of loosing business to competitors
- Fear of his agency falling behind the digital marketing scene

This section will drive new product/service development as well as the copywriting and ad creative you'll use to compel your ideal customer to action.

When selling certifications to Agency Eric, for example, we would do well to build solutions to his challenges and pain points and use language that addresses them in our marketing messages.

For example, our sales letter should include copy like...

Are you tired of losing proposals simply because you don't offer Content Marketing services to your clients? Certify your team with Emedia Creative's Content Marketing Mastery Course and Certification.

Copy like that will get a response from Agency Eric because it is specific to one of his pain points.



## Step 04

# Sources of Information

### Books:

Good to Great / Think & Grow Rich

### Magazines:

Wired / Fast Company

### Blogs / Websites:

AdAge / DigiDay / Social Fresh

### Conferences:

Australian Digital Summit /  
DigiMarCon Australia / Inbound

### Gurus:

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### Other:

Spends time on LinkedIn looking for talent

**This section of the Customer Persona Worksheet is critical to determining the “where” of your customer persona.**

**You will determine the best places to advertise and the targeting options you'll use to reach your persona by listing their sources of information.**

## PRO TIP

When buying ads on platforms like Facebook, you'll often be able to laser target your audience by focusing on niche interests. For example, if you were targeting golfers, don't use someone like Tiger Woods. Tiger would have fans outside of golfing that won't have a great interest in golfing products. Use a lesser know golfer that only true fans of golf would be aware of.

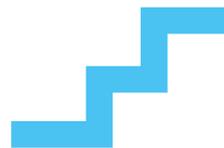
Use the “But no one else would” trick when filling out this section of the worksheet. You'll simply complete sentences like these...

- My ideal customer would read [BOOK] but no one else would.
- My ideal customer would subscribe to [MAGAZINE] but no one else would.
- My ideal customer would attend [CONFERENCE] but no one else would.

Are you getting the picture?

The idea is to find the niche books, magazines, blogs, conferences, gurus, etc. your ideal customer would be attracted to – but no one else would.

For example, if you are in the golf products market – you wouldn't want to assign Tiger Woods as a guru. Tiger is someone that golfers are familiar with – but so is everyone else.



## Step 05

# Objections & Role Purchase Process

### **Objections to the Sale:**

- Does the training fit an existing service or a new service he can offer to his clients
- How long he and his team member will be "out of pocket" doing the training

### **Role in the Purchase Process:**

Eric is the decision maker. He buys digital marketing training to keep and his team sharp. He's not worried about the price point if he knows the training will give he and his team an edge in the marketplace

Why would your customer persona choose **NOT** to buy your product or service? These are called "objections" and they must be addressed in your marketing.

For example, if we know that Agency Eric is concerned with the amount of time his team members will be "out of pocket" to receive the certification, we might send an email with a subject line like...

**Content Marketing Certified (In one business day)**

You must also determine your persona's role in the purchasing process. Are they the primary decision maker? Are they a decision influencer?

Understanding your ideal customers decision making process is paramount to the success of your marketing and sales campaigns.



// PART 04

# Build Multiple Personas

# 04



# Now it's your turn to build a Persona

Start by building a single persona. But don't stop there.

Once you get the hang of it, you'll be churning out multiple personas representing the different segments of your market.

Don't go overboard, but any lucrative market segment with a distinct set of goals, sources of information, pain points, etc. is deserving of a customer persona. Use the Customer Persona Worksheets opposite (there are male and female versions) to get clear on your ideal customer.



**START BY BUILDING  
A SINGLE PERSONA.  
BUT DON'T STOP THERE!**

# Customer Persona

Name

Age

Gender

Marital Status

# / Age of Children

Location

Quote

Occupation

Job Title

Annual Income

Level of Education

Other

## Challenges & Pain Points

Challenges

Pain Points

## Sources of Information

Books

Magazines

Blogs / Websites

Conferences

Gurus

## Goals & Values

Goals

Values

## Objections & Role Purchase Process

Objections To The Sale

Role In The Purchase Process

// ABOUT

# Emedia Creative

**Since 1991, we've helped businesses who want to grow, but stalling sales and ineffective digital marketing has left them stressed and confused.**

We understand that implementing marketing plans is an overwhelming, time consuming and never-ending task. A task that becomes almost impossible without a Customer Persona to direct and build your communication around.



**WE HOPE YOU GET A LOT OF VALUE OUT OF THE CUSTOMER PERSONA WORKSHEET. USE IT CORRECTLY AND IT WILL TRANSFORM YOUR BUSINESS.**

For more tips and guides to help your business grow, visit [www.emediacreative.com.au](http://www.emediacreative.com.au) or send us an email [info@emediacreative.com.au](mailto:info@emediacreative.com.au)

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