

Creating Personas

A free template for businesses learning about their users and customers



What Are Buyer Personas?

Buyer personas are fictional, generalized representations of your ideal customers. They help you understand your customers (and prospective customers) better, and make it easier for you to tailor content to the specific needs, behaviors, and concerns of different groups.

The strongest buyer personas are based on market research as well as on insights you gather from your actual customer base (through surveys, interviews, etc.). Depending on your business, you could have as few as one or two personas, or as many as 10 or 20. (Note: If you're new to personas, start small! You can always develop more personas later if needed.)

What Are Negative Personas?

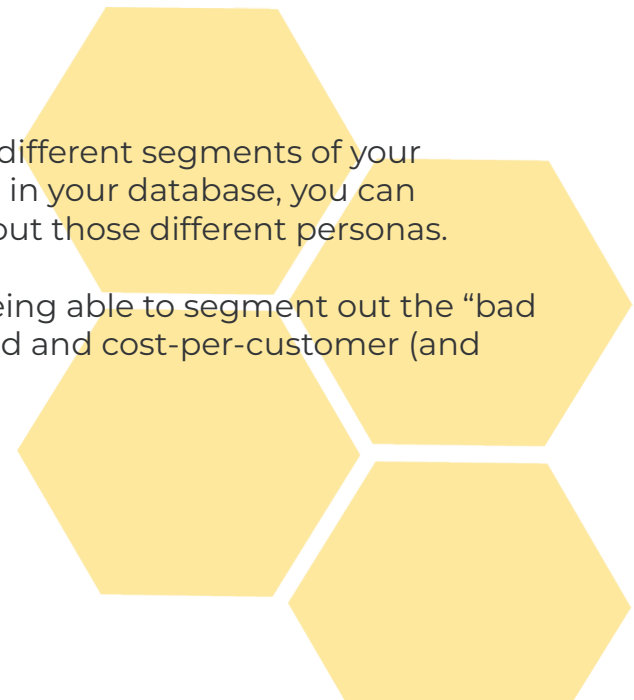
Whereas a buyer persona is a representation of an ideal customer, a negative -- or "exclusionary" -- persona is a representation of who you don't want as a customer.

This could include, for example, professionals who are too advanced for your product or service, students who are only engaging with your content for research/knowledge, or potential customers who are just too expensive to acquire (because of a low average sale price, their propensity to churn, or their unlikeliness to purchase again from your company.)

How Can You Use Personas?

At the most basic level, personas allow you to personalize or target your marketing for different segments of your audience. For example, instead of sending the same lead nurturing emails to everyone in your database, you can segment by buyer persona and tailor your messaging according to what you know about those different personas.

If you take the time to create negative personas, you'll have the added advantage of being able to segment out the "bad apples" from the rest of your contacts, which can help you achieve a lower cost-per-lead and cost-per-customer (and see higher sales productivity).



How Can You Use Personas?

When combined with lifecycle stage (i.e. how far along someone is in your sales cycle), buyer personas also allow you to map out and create highly targeted content.

How Do You Create Buyer Personas?

Buyer personas are created through research, surveys, and interviews of your target audience. That includes a mix of customers, prospects, and those outside of your contact database who might align with your target audience.

Here are some practical methods for gathering the information you need to develop personas:

- Interview customers either in person or over the phone to discover what they like about your product or service.
- Look through your contacts database to uncover trends about how certain leads or customers find and consume your content.
- When creating forms to use on your website, use form fields that capture important persona information. (For example, if all of your personas vary based on company size, ask each lead for information about company size on your forms. You could also gather information on what forms of social media your leads use by asking a question about social media accounts.)
- Take into consideration your sales team's feedback on the leads they are interacting with most. (What types of sales cycles does your sales team work with? What generalizations can they make about the different types of customers you serve best?)

How Do You Create Buyer Personas?

- **HubSpot customers:** You can create and manage your personas within the Contacts tool.
- **Customers and non-customers alike:** You can use the following template to organize your persona data.
- First, we'll walk you through an example, then we'll leave you with some blank templates so you can get to it!

Persona One:

(Input an adjective followed by a fictional name - extra points for alliteration!)

Age:

Job title:

Education:

Additional relevant information:

(Familial status, gender, hobbies,
socioeconomic status, technological aptitude,
social circles, etc.)

Five important personality traits:

Referral Method:

(Click the boxes to indicate how likely the
persona would be to be referred to your
business by each method)

Social media:

Word of mouth:

Online ads:

Traditional ads:

Other:

What kind:

Frustrations & Pain Points:

1.

2.

3.

Wants & Needs:

1.

2.

3.

Key Questions & Ideas:

1.

2.

3.

Technology Engagement:

(Click the boxes to indicate how likely the persona
would be to use each type of device)

Cell phone:

Computer:

Tablet:

Other:

What kind:

Persona's quintessential quote:

Persona Two:

(Input an adjective followed by a fictional name - extra points for alliteration!)

Age:

Job title:

Education:

Additional relevant information:

(Familial status, gender, hobbies, socioeconomic status, technological aptitude, social circles, etc.)

Five important personality traits:

Persona's quintessential quote:

Referral Method:

(Click the boxes to indicate how likely the persona would be to be referred to your business by each method)

Social media:

Word of mouth:

Online ads:

Traditional ads:

Other:

What kind:

Frustrations & Pain Points:

1.

2.

3.

Wants & Needs:

1.

2.

3.

Key Questions & Ideas:

1.

2.

3.

Technology Engagement:

(Click the boxes to indicate how likely the persona would be to use each type of device)

Cell phone:

Computer:

Tablet:

Other:

What kind:

Persona Three:

(Input an adjective followed by a fictional name - extra points for alliteration!)

Age:

Job title:

Education:

Additional relevant information:

(Familial status, gender, hobbies, socioeconomic status, technological aptitude, social circles, etc.)

Five important personality traits:

Referral Method:

(Click the boxes to indicate how likely the persona would be to be referred to your business by each method)

Social media:

Word of mouth:

Online ads:

Traditional ads:

Other:

What kind:

Frustrations & Pain Points:

1.

2.

3.

Wants & Needs:

1.

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Key Questions & Ideas:

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Technology Engagement:

(Click the boxes to indicate how likely the persona would be to use each type of device)

Cell phone:

Computer:

Tablet:

Other:

What kind:

Persona's quintessential quote:

Chart a Path to More Revenue

Custom Growth Plans

Ready, set, grow.

Get customized growth plans for your business using SEO, digital marketing and web design. Whatever you decide, we can help deliver real results for less than the cost of a new hire.