



WORKSHEET:

Persona Development for B2B Marketers



DON'T BE INTIMIDATED BY PERSONAS

When it comes to creating personas, start small. Keep each persona simple and manageable. Refine and expand over time as it makes sense. Leverage marketing automation to help you work smarter, not harder.

Even if you don't use marketing automation, you still can benefit from the personalization insights that personas will uncover. Regardless of your approach, personas are a proven tool to help your company remain relevant to prospects and keep them engaged.

WHAT TO INCLUDE IN PERSONAS

PERSONA NAME

- Job title or role
- Biggest frustrations and challenges (AKA pain points)
- Work-related issues that keep them up at night

BIO INFORMATION

- Address
- Relevant demographics (age, gender)
- Company size (number of employees, revenue, etc.)

COMMUNICATIONS

- Social media channels
- Preferred contact methods
- Industry news preferences

BUYING CONCERNS

- Most urgent needs (AKA problems to be solved right now)
- Goals and objectives (short- and long-term)
- Products and services that are high value
- How they make a purchasing decision



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HOW TO PRESENT PERSONAS:



PERSONA NAME:

Mary Academic, member of a professional society for chemists

Job title or role

Assistant / Associate Professor, Professor

Biggest frustrations & challenges (AKA pain points)

Mary needs to regularly publish original research to maintain her position — she needs to attract and mentor graduate students who will perform much of the research

Work-related issues that keep them up at night

On top of Mary's pain points, she is also required to teach undergraduate classes

BIO INFORMATION:

Address

University Name
123 University Rd
Town, USA

Relevant demographics (age, gender)

Female professor and chemist, on tenure track

Company size (# of employees, revenue, etc.)

Professional society with 50 employees and 10,000 members nationwide

COMMUNICATIONS:

Social media channels

Facebook, LinkedIn

Preferred contact methods

Email

Industry news preferences

Member newsletter

BUYING CONCERNS:

Most urgent needs (AKA problems to be solved now)

Networking for ongoing research projects, easy access to research materials and industry news

Goals and objectives (short- and long-term)

The University measures Mary's performance in two ways: whether her graduate students receive their PhDs, and undergraduate reviews of her teaching

Products and services that are high value

Enjoys networking with colleagues and speaking at professional conferences

How they make a purchasing decision

Reviews resources directly related to university or industry research projects



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GET STARTED ON A NEW PERSONA:



PERSONA NAME:

Job title or role

Biggest frustrations & challenges (AKA pain points)

Work-related issues that keep them up at night

BIO INFORMATION:

Address

Relevant demographics (age, gender)

Company size (# of employees, revenue, etc.)

COMMUNICATIONS:

Social media channels

Preferred contact methods

Industry news preferences

BUYING CONCERNS:

Most urgent needs (AKA problems to be solved now)

Goals and objectives (short- and long-term)

Products and services that are high value

How they make a purchasing decision