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Persona Development for B2B Marketers

Table of Contents

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What is Persona Development?

In 2017, the average business user received 121 emails per day

Nowadays it is rare to read a marketing newsletter or blog and not find some mention of personas — with good reason. Your customers' inboxes are overflowing with messages competing for their time, attention, and wallet. In 2017, the average business user received 121 emails per day.

Unless those emails deliver targeted information that is relevant and interesting to the recipient, they are destined for the trash folder. Industry studies show that, on average, nearly two-thirds of business emails go unopened. Applying personas to your email campaigns is one key step to ensuring your emails stand out from the rest.

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What is all this talk about personas?

The term "persona" may feel like general jargon, but it's a succinct way of collecting information to know your audience, and deliver what is interesting and relevant to that audience. While the concept of personalization is old-school marketing, the techniques available through today's marketing automation technology make personalization easy for even a one-person team. Personas provide structure to your personalization strategy by painting a composite of the various segments of your audience. By understanding their roles and responsibilities, motivations, and drivers, you can create meaningful dialogue with them.

Bringing personas into your marketing strategy doesn't have to be hard. Here is a four-step guide to creating and leveraging personas.

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Step 1: Define Your Audience

There are many ways to slice and dice your customer and prospect data, but as a business-to-business entity, you must be concerned with two primary dimensions: the quality of the company you're selling to, and the people at those companies. It makes no difference if you've identified the most correct point of contact if the company they work for can't afford your product. At the company level, create segments based on demographic data, such as company revenues and number of employees. At the individual level, you can rely on both demographic data (e.g. job title, decision-making authority, age, etc.) and engagement data (opens, clicks, website visits, etc.).

Business-to-consumer companies, on the other hand, may want to use demographics such as gender, age, buying habits, address, and education to segment their customer base.

How Does Your Audience Interact? Find the "Heart Data"
Customize your personas beyond jobs and age brackets — certain demographics can inform how those personas will react to certain language, offers, and interactions.

Lead scoring is another valuable tool for segmenting your audience. Highly engaged prospects, as reflected by higher scores, are likely further down the sales funnel as potential buyers. How you communicate with them will be quite different than how you communicate with a fresh prospect, an inactive prospect, or a new customer.

But just defining your audience demographics does not complete your personas. Demographics answer the "who" or "what" of your audience but not the "why" and "how" that you will need to form your composite personas. The "why" and "how" are the behavioral characteristics your audience shares.

There is no right or wrong answer for the number of personas to develop, but two important tests are:

1. **Is it meaningful?** If I create a persona for this type of prospect, will it make sense to others (and to me) in a year from now? Will this be recognizable?

2. **Is it manageable?** If only a handful of prospects are in a persona, it's too specific. A good rule of thumb is to start out small, with no more than three to five personas, and expand over time as you get more comfortable with the process.

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Step 2: Uncover the Data

Of course, this all sounds great — but where do you find the information you need to build out your personas? Your company is a treasure trove of data if you know where to look. You may be surprised at what you can uncover with minimal sleuthing. Here are some good sources to get you started:

- **Web form submissions** are a great place to start gathering the "who" and "what" answers. Think of all the forms you use — surveys, event and webinar registrations, a ticketing system, and/or your marketing automation tools. The key is to be sure they ask the right questions.

- **Your CRM system** is a good source to spot potential persona groups. Consider segmenting by job titles for decision makers or end users; customers who actively advocate or speak on your behalf; and members of an advisory panel.

- **Rely on subject matter experts.** Ask your colleagues for input from their respective areas — what commonalities do they see in the prospects with whom they interact?

- **Go to the source.** To understand the "why" and "how" themes within your audience, the best insights come from your customers. If you conduct an annual customer satisfaction survey, scour it for nuggets or ask specific questions. Meet one-on-one with them, or host focus groups using a persona checklist or worksheet to ensure you gather useful information.

Check out a persona format example on page 15
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Step 3: Visualize Your Personas

Once you have uncovered data about your personas, you need to document them in a way that you and your team can easily reference. Your personas can be a simple document, or an infographic that paints a picture of the types of individuals comprising that persona. These serve as a guide when framing messaging, developing calls to action, and even writing subject lines.

Like the number of personas themselves, your persona documents should pass two primary tests:

1. Is this format understandable to others?
2. Is this format one I can manage over time?

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Step 4: Put Your Personas to Work

Your personas form the basic understanding of who your audience is, what motivates them, what will resonate with them. Now that they are developed, you can deliver more useful, relevant content to them.

Marketing automation enables you to take what you know about various personas, and customize your messaging — from simple drip campaigns to more sophisticated, dynamically rendered content. Marketing automation puts structure around your marketing and enables you to do multiple things with less effort.

Marketing automation gives you an advantage in two areas: dynamic content and segmentation.

Dynamic content

Create one campaign, but with sections of dynamically rendered content that targets specific personas. The dynamic content might be a paragraph in the email body or a call to action, sidebar, special offer, or even a graphic. Instead of creating multiple, individual emails, you can do the heavy lifting of writing the bulk of a campaign all at once, identify where you want that dynamic content to live and for which audiences, develop variations, and then launch the full campaign.

ENTOMOLOGICAL SOCIETY OF AMERICA BRINGS DYNAMIC CONTENT TO THANK YOU CAMPAIGNS

When the Entomological Society of America (ESA) started incorporating dynamic content into its email communications, it started with a single email: the thank you notes sent to reviewers of journal articles. Using dynamic content, the team could create the core content for one email, then swap out content customized to specific journals, enabling them to thank all reviewers at once. Over time, the ESA incorporated dynamic content into event marketing, sending variations of one webinar invitation to both members and non-members.

Segmentation

Marketing automation makes segmenting your campaigns easier. Just as you would do when developing education sessions or tracks for a conference, look at your audience, customize your offers, and segment to your various personas.

AFTER SEGMENTATION, THE ESA'S OPEN RATES CLIMBED NEARLY 37%, A 13% JUMP OVER THE PREVIOUS YEAR

Combining both approaches is where marketers really begin to see payoff. For example, when the ESA combined personalized data and dynamic content in its membership renewal campaign, it saw a 3 percent uptick in renewals immediately. Using the combined approach for its member e-newsletter, open rates climbed to nearly 37 percent, a 13 percent jump over the same newsletter sent through their prior tool.

In the same way, the ESA's annual conference campaigns have generated twice the number of paper/poster submissions as its previous emails, and helped the ESA achieve its highest conference attendance in its history.

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Don't Be Intimidated by Personas

Start small. Keep your personas 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.

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Start Your Own Persona Development Worksheet

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

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