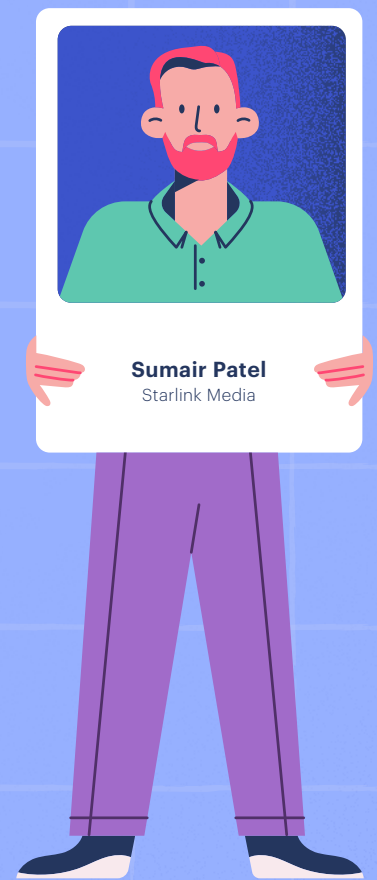


# The ultimate guide to building buyer personas

+ your printable worksheet



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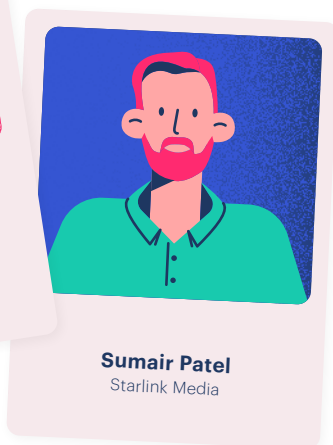
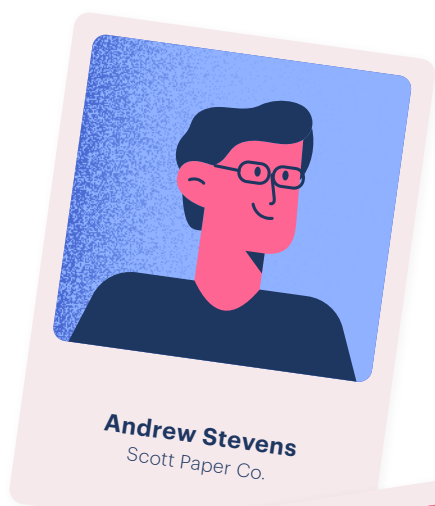
# Introduction

As a business, offering the best products or services is important — but you can't do anything without customers. You can't hire employees, invest in your business, or grow without a healthy base of loyal, paying customers.

Sourcing clients is the prerequisite to everything in your business.

But even when you do manage to find your customers, it's clear that not every person is the best fit for what you do. And you certainly don't want to waste your team's time on the wrong customer.

Buyer personas, also known as ideal customer profiles (ICPs), are the best way to refocus your sales and marketing efforts, especially if you're a small business. Learn what buyer personas are, why you need them, and how to develop your own.



# What is a buyer persona?

A buyer persona is a profile of a person you sell to. Think of this as an aggregate identity that contains all of the common attributes of one type of customer.

Keep in mind that a buyer persona is different from a company profile. Instead of analyzing a target company for **account-based marketing**, a buyer persona looks at the individual decision-maker.

Buyer personas look like *current* customers. While you may be inclined to dream up ideal customer profiles, getting too aspirational can put your head in the clouds — to the detriment of getting real results.

Personas aren't invented, they're discovered. To build your buyer personas, base them on the real people who buy from you, right now.



# Why you need ideal customer profiles

Without buyer personas, you risk putting out general marketing that simply misses the target. By taking the time to build out your buyer personas, you'll not only solve customer problems but also:

- ✓ **Save money:** For real. Instead of spending money on marketing tactics targeting the wrong people, your personas will keep you on the straight and narrow. Personas also reduce the burden on your sales and marketing folks, which means you can get results with a smaller (more cost-effective) team.
- ✓ **Save time:** You aren't selling to everyone on the planet. By narrowing down who you're speaking to, you avoid spending too much time selling to the wrong customers. Buyer personas help you identify who benefits the most from your offerings so you can find them faster.
- ✓ **Close more sales:** Are you sick of customers not engaging with your content? Personas help you work backward with the right information to create content that solves customer problems, leading to more sales in the process.
- ✓ **Improve customer relationships:** Ideal customer profiles aren't just about attracting new customers. You can use them to give existing customers the best experience possible so they stay with you for the long haul.





## A 4-step guide for developing customer personas

You wouldn't go on a road trip without a destination or GPS, right?

Of course not! That's why every brand needs buyer personas. Follow these four steps to develop strong buyer personas that make the most of your resources.

## Step 1

# Gather data on your current customers

Ideal customer profiles can be kind of a trap — when they're based on assumptions. So many business owners assume key details about their current customers, but they don't have any data to back it up. This approach can translate into a lot of wasted time and money, so don't skimp on the research.

The first step to building a buyer persona is to do research on your existing customers. This is critical because it ensures that (a) these customer profiles exist and (b) there are enough of these types of customers in your biz to warrant a persona in the first place.

To start, go through your data to find your top customers. A group of 100 or more customers is ideal, but if your business is still growing, look for your top 5-10 favorite customers. These are usually customers who:

- **Have a budget**
- **Have a need for your services**
- **Are easy to work with**

If you're [using a CRM to log your customer data](#), sift through your accounts to find your top folks. Look for profitable customers that you enjoy working with. Read through the notes and email exchanges on the account for more insights — what questions they're asking, what issues they're struggling with.

This initial data should give you enough information to formulate a broad hypothesis,

like, "Our ideal customers are high-functioning solopreneurs who have more business than they can handle and urgently need more help." Then dive deeper into the research to test this hypothesis. Dig into the psychographics of your persona — their personalities, values and emotional states. You can make these discoveries through:

- **Customer interviews or surveys**
- **Sales call recordings**
- **Interviews with sales or customer success (the people on the front lines)**
- **Paid surveys**
- **Notes in support tickets and complaints**
- **Forums like Quora and Reddit**

After reviewing data from multiple sources, you'll likely start to see some patterns that will help you confirm or adjust your hypothesis, and perhaps even identify additional pain points in the process. Chances are, you'll spot 3-5 buyer personas that already exist in your business based on the data. Now you're ready for step two.



## Step 2

# Create personas with your team

You have the raw data, but now you need to flesh out your personas. Bring sales, marketing, customer service and your product teams together for this exercise.

At a minimum, you'll need two personas. The first is the decision-maker, or the person with influence over the budget. The second should be the person who wants your service and will use it every day.

Start with your decision-makers and tease out other personas from there, compiling information on:

- **Job title:** What are their responsibilities? What do they manage? Who do they report to?
- **Industry:** This isn't a company profile, but you do need a general idea of the persona's company. At a minimum, include the general industry and company size.
- **Average budget:** How much money, on average, does this persona spend on solutions like yours? Are they more price-sensitive, or are they willing to pay more for a better solution? How does this match up against your pricing or packages?
- **Decision-making process:** How does the persona's sales process work? How many people does the buyer have to bring in to make a decision? How long can you expect them to take to make a decision?
- **Content preferences:** How does this buyer like to consume information? Where are they online? Are they reading blogs? Following influencers? Members of certain professional organizations?
- **Pain points:** Why is this buyer choosing you, on both a rational and emotional level? What rational business pain has them banging their head against the wall? (For example: Sales people going rogue and tainting the brand reputation.) What emotional pain keeps them up at night? (For example: Feeling heartsick at not being able to cover payroll for their hard-working staff.) Understanding rational pain will help you better present value to prospects, while understanding emotional pain enables you to speak your customers' language and empathize with them. Most personas have more than one pain point, so start by listing their top three, by order of importance.
- **Common objections:** Why do leads turn away from your business? What objections does your sales team hear over and over again? Understand each buyer's objections so you can counter them with information that helps them overcome their hesitations. For example, if the objection is "Your service is too expensive," a counter would be, "We're a premium social media service that offers more than our competitors, with unique features like X, Y and Z." Personas usually have more than one objection, so start with their top three.



## Step 2

# continued

- **Elevator pitch:** Finally, each persona needs an example elevator pitch. This is a short, 2-3 sentence pitch that your sales team can refer to when they're chatting with leads. The goal is to pitch your solution in a way that most appeals to the persona's pain points.

If you're wondering about age, gender and education level, we've found that leaning too much into the demographics can hurt your ideal customer profiles. For example, if you label your decision-maker profile as a man, it can unintentionally cause your team to overlook female decision-makers. It's best to keep your profiles as neutral as possible.

From there, remember to give each persona a nickname. They should be short and catchy enough that your sales team can refer to them easily. Something like "Newbie User" or "Big Boss" may sound cheesy, but naming personas gives your team a shorthand way to refer to a certain type of customer.

And, of course, once you name your persona, you have the creative freedom to assign them an identity, whether in the form of stock photos, cartoons or abstract icons. Have fun with it!

## Step 3

# Segment your leads into personas

So many businesses go through the trouble of creating buyer personas, only to lock them up and never use them again. The thing is, personas only work if you use them.

That's why we recommend mapping all of the leads in your CRM to a particular persona. In Copper, you can actually automate this based on your leads' job titles.

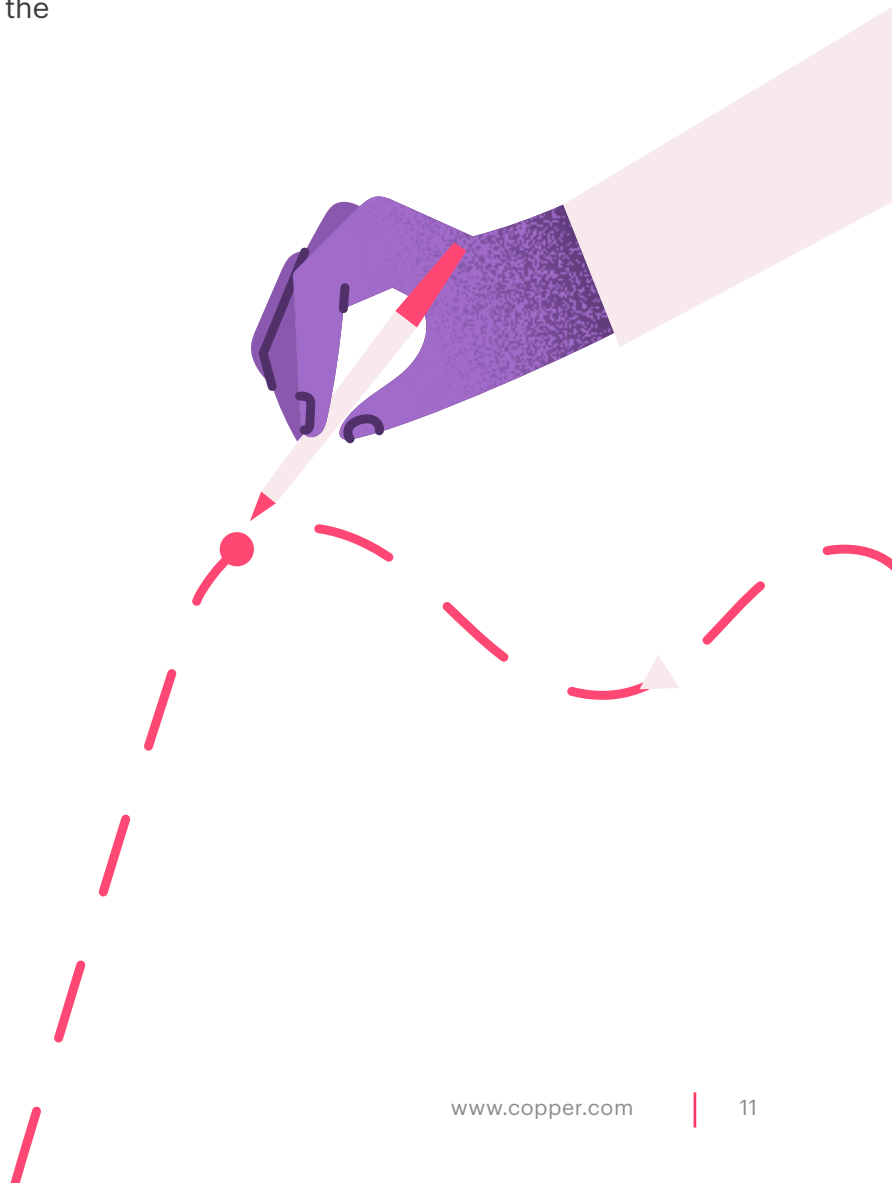
**With a custom field**, you can require your sales team to assign each lead to a customer persona. This will keep your list clean and help your reps choose the right playbook for each lead based on their assigned persona.



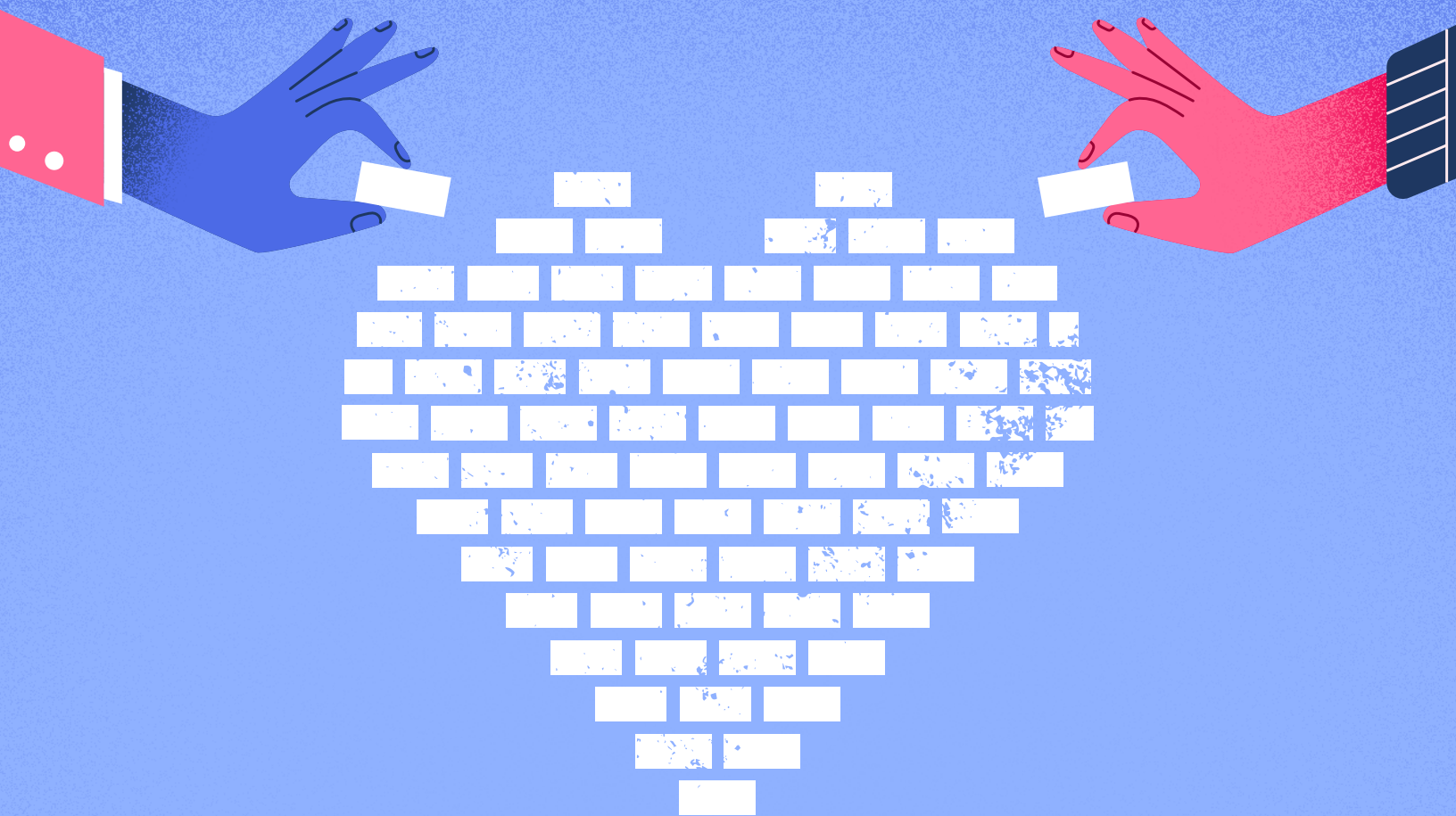
## Step 4

# Don't “set it and forget it”

The most effective buyer personas are living, breathing documents that you adjust over time as your business and customers evolve. A lot can happen in a span of a few months — just think about the year that was 2020 — so we recommend revisiting personas at least every 6 months, conducting additional customer research, and making any needed tweaks to ensure your personas still match your customer base. You may find that these profiles are still just as accurate, but there will likely come a time when you need to create an entirely new persona or remove an existing one to reflect the evolving face of your customers.



**:copper**



## It's time to build your own **buyer persona**

You're here to serve your customers. The best way to enthrall them at every turn is to know everything you can about them. But you need to go beyond factoids like age and demographics and look at their real needs instead.

Use the next page of this guide to kick off your buyer persona brainstorming. Print off as many copies as you need and work with your team to build your personas.

You've got this.

# Printable worksheet: Buyer persona builder



Persona name:

Job title:

Industry:

Average budget:

Decision-making process:

Content preferences:

## **Pain points:**

Pain point 1: \_\_\_\_\_

Pain point 2: \_\_\_\_\_

Pain point 3: \_\_\_\_\_

## **Common objections:**

Objection 1 + counter: \_\_\_\_\_

Objection 2 + counter: \_\_\_\_\_

Objection 3 + counter: \_\_\_\_\_

## **Elevator pitch**