

Creating Your Customer Persona

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We'd like you to meet Anna. Anna is a 33-year-old marketing associate at a midsize company that's seeing rapid growth. She was in a different industry altogether before taking this job; her position is an entry-level one; and she wants to learn all she can about marketing to "catch up" with her colleagues, who are around her age but have been in marketing for much longer than she has.

The company's marketing manager, whom she reports to, has suggested that the more quickly she proves her value to the CFO by showing the ROI on the campaigns she's assisting with, the more quickly she'll move up in the company. So she's willing to devote her weekends over the next six months to diving deeply into comprehensive content about All Things Marketing.

There are more things we could tell you about Anna (we've spent a *lot* of time thinking about her), but we think you get where we're going with this. Anna isn't a real person—at least not *exactly*. She's a representation of our ideal reader. We created her with some combination of raw data, educated guesses, and testing (and therefore more data) to confirm our hypotheses about her. We can't write *without* her, because we wouldn't know what topics to choose, what language to use, or how basic or complex to make our content. When we write, we write *to* her.

While we have a *reader* persona at Zoho Academy, *you're* likely to have something similar: a *customer* persona. And you can't dive into brand positioning—or marketing, or advertising, or even building your product, for that matter—without knowing exactly who your persona is (or who *they are*).

Part of the reason brand positioning strategies fall flat with target markets is that businesses see their prospects and customers as data points rather than as real people. That's not to say that data isn't important! But it's easy to get so enmeshed in the numbers that you forget brand positioning is ultimately about empathy. Remember, the *first* of the [three key components of successful brand positioning](#) is that the value or benefit you claim to offer must be important to your target market. And you can only know what's important—and relevant—to them if you can get into their heads and hearts.

What is a Customer Persona?

Like Anna, a persona is a semi-fictional representation of your *real* prospects and customers—one

you create based on [market research](#) and its accompanying data, including insights gathered from your own customers. While in theory your persona is hypothetical, the intelligence it's built on (validated commonalities, *not* assumptions) is *not*. Your persona shares your market segment's most common traits. By "traits" we mean both demographic information (age, education, income, geographical region, relationship status, family size, career) and psychographic information (interests, beliefs, values, hobbies, spending habits, reasons for buying, concerns).

Personas are ultimately useful for *internalizing your ideal customer*. With detailed (and accurate!) demographic and psychographic information, you'll better understand your target market's attitudes, what they're hoping to accomplish and what goals drive their behavior, how they think and what factors cause them to buy. You'll remember your customers are *real humans*—and you'll market, write, and build for them as such.

Keep in mind that you may have more than one customer persona. If your company makes women's watches, for example, you have *at least* three possible buyer segments: women who purchase for themselves, consumers who purchase for the women in their lives, and wholesale buyers who want to sell your watches in their online and retail stores. If you own a fitness club, your personas might be segmented by interest (nutrition classes, spa, personal trainers for weightlifting, and so on). Naturally, your marketing messages—and maybe even your product or service—will be different for each of these segments.

Pro tip: Sometimes it's useful to come up with a "negative buyer persona" or an "exclusionary persona." This is a representation of someone who is definitely *not* your customer—whose behaviors, demographics, etc. disqualify them from your marketing efforts. The value of an exclusionary persona is that you won't waste precious time on strategies that won't ever convert that segment.

Where do I Find Concrete Data to Verify my Customer Persona?

Experience and gut feelings are invaluable in other aspects of your business; but they won't do you much good here. You'll want a combination of quantitative (numerical) and qualitative (anecdotal) data.

If you're a brand-new business, you won't have data about *your* customers yet... but there's still intelligence out there for you. Rather than create a persona out of assumptions about whom your brand *should* appeal to, [use secondary market research](#) to determine whom it's *likely* to appeal to. (Or skip down to the section on "[Competitor data](#).") You'll iterate your persona as your business grows and more data about *your* customers becomes available to you.

If you've been in business for awhile, on the other hand, you can gather data on both *current* customers *and* potential customers. Here's where to start your persona research:

Social media

In 2013, [IBM claimed that 90% of the world's data had been created in the last two years](#); that growth has hardly slowed. Social media is now a veritable goldmine of persona data, created entirely by customers *themselves*. "Listen" for compliments, complaints, questions, retweets, and backlinks on Facebook, Twitter, LinkedIn, Instagram, YouTube, even Snapchat. Pay particular attention to those mentions that suggest happy customers, or any degree of *desire* for your product.

Tools such as [Zoho Social](#), [Mention](#), [Hootsuite](#), and [Google Alerts](#) allow you to monitor keywords so you can stay up-to-date on what people are posting. When you get a notification, go into the profiles of the people mentioning you. Read their *other* posts. What are they writing about? How do they speak? What are their interests *outside* of your business? Who else are they following? What are their demographics? You'll want to ask these questions of all your most active followers.

Built-in reporting tools on social platforms can also offer data about the users interacting with your profiles. [Twitter's audience insights](#) and [Facebook Audience Insights](#) will tell you about your followers' demographics, interests, purchasing behavior, lifestyle, and more.

If you don't have a particularly large follower base, you can use tools such as [Socialbakers](#) or [Followerwonk](#) (specific to Twitter) to find out about your *competitors'* audiences. (After all, your [direct competitors](#) share customer personas with you.) Of course, both platforms will tell you loads about your *own* followers as well. For instance, Followerwonk can generate word clouds from the language in your Twitter followers' bios—which means you not only have a big-picture idea of your followers' interests, you *also* know what language they're using to talk about them.

Website and site analytics

If you've enabled [demographic and interest reports in Google Analytics](#), you've got a wealth of information about your site visitors at your fingertips—including age, gender, location, affinities, and technologies. As Google describes it, "The Age, Gender, and Interests reports all include engagement and conversion metrics. You can start from any of these reports to build a picture of your high-value customers."

Analytics will also show you what keywords visitors use to find you, what pages they visit, and how long they spend on your site. This intelligence reveals the pain points that lead the majority of visitors to your site... along with trends in the platforms and tools they use to get there. What's more, [Google's segmentation feature](#) allows you to drill down into *subsets* of site users—returning users, for instance—to get a better sense of the characteristics of that filtered group.

There are at least two other ways we can think of to use your website to craft customer personas. The first is through [web forms](#). [Signup forms](#), [account creation forms](#), and [contact forms](#) can

include fields for capturing the information you need to clarify your persona. This might mean posing one additional question, such as: "If we could help you with one thing, what would that thing be?" or "What are you most hoping for in a solution like ours?"

The point is to get a bit of *qualitative* data alongside the *quantitative* data your form is already capturing.

Pro tip: If you *do* decide to use a web form to gather additional persona intelligence, consider conducting a [form analytics](#) experiment to ensure you're not losing users by asking too many questions. As a general rule, you want to keep your web forms as simple as possible.

Finally, your website can capture visitor information through exit surveys. Platforms such as [Zoho Survey](#) and [Qualaroo](#) allow you to arrange a form that pops up at a specified time (or page) in [the visitor's journey](#). The platform detects visitors' exit intent and triggers the survey. This is your moment to ask if your site offerings are meeting visitors' needs, what obstacles or friction points are keeping them from buying, and so on. Their answers will add another facet to your persona. Here's an example from [Athleta](#). (That second question—the reason for the site visit—could be a useful persona question):

Surveys, interviews, and focus groups

Whatever answers you can't discover through analytics you can get through direct contact with your market. We've discussed [surveys](#), [one-on-one interviews](#), and [focus groups](#) elsewhere, so we'll keep it short here. All three can be used for *any* market research question you might come up with... and your persona is among them.

[Surveys](#) can go out through [email](#), social media, SMS, QR codes, and more. The number and type of questions you ask will depend upon your (real or perceived) target audience and the platform the survey is on.

Phone interviews, in-person interviews, and focus groups will get you deeper insights. In some cases, they'll allow you to meet your market face-to-face and see how they respond to social situations. Prepare your questions to fill in the aspects of your persona that aren't fleshed out in your mind yet: pain points, values, goals, concerns, purchasing motivations, buying habits, and so on. (We've got some [examples of strong survey questions](#) for you if you need help getting started.)

Keep in mind that the respondents you choose for surveys and interviews don't *all* have to be loyal customers. Of course, you'll absolutely want to invite *them*... but it can be just as valuable to pose

questions to prospects who *didn't* choose you to give you a stronger sense of who *isn't* a fit for your offering.

Your team

Don't underestimate the resources that are right under your nose. Your customer service team, sales team, and support and floor staff probably know more than anyone about who your customers are and what makes them tick. Your sales team can list off your customers' biggest pain points and strongest motivations. Your support team knows their most frequent post-sale inquiries and biggest frustrations. Your customer service team will have noticed differences between customers who churn and those who stay with you for the long term. And so on.

Between them, your employees will be able to draw up a composite sketch of your customer persona/s by observing commonalities among the prospects and customers they interact with on a daily basis. What generalizations can they make about the target market segment, or customer base, you currently serve?

While we're at it, the data in your [CRM](#) can confirm whatever generalizations your teams make. Mine the data in your records: What are the similarities between your repeat purchasers and best customers? *Those* characteristics will become part of your customer persona.

Competitor data

It may be the case that you don't have much data to dig through or many customers to interview. This doesn't mean you should create personas based on hunches! [Determine who your primary competitors are](#) and get intimate with *their* customer bases.

One place to start is with a platform such as [SimilarWeb](#) that allows you to analyze your competitors' website traffic. These platforms track volume, engagement, visitor interests, geographic distribution and more—ultimately giving you insights into the character and habits of your *own* persona. *Then*, visit your competitors' blogs and social media pages. Pay particular attention to the visitors who leave comments on their blogs and interact with—and share—their posts. Click into those visitors' profiles and take down whatever information you can.

The above is a shortlist. Market research services such as the [Buyer Persona Institute](#), online forums and events where you know your target market hangs out, and other [secondary market research techniques](#) can get you worlds of information on your persona. Use a combination of these things. Data gathered through interviews, for instance, runs the risk of being distorted by bias. Analytics, on the other hand, won't get you deep insights into customer motivations. So

choose methods that will supplement each other.

I've Got My Persona Details... Now What?

At the end of all that digging, you'll have a lot of raw data about your target market: demographic information, career information, and an acute idea of your customers' personalities, preferences, goals, fears, values, and challenges... as well as their buying behaviors.

The next step is to identify all the patterns and commonalities you can. How do the *majority* speak? What is the biggest challenge the *majority* faces? What does their money, time, intellectual labor, social and political capital overwhelmingly go toward? What forces typically motivate them to take action? How do they define "success"? And so on. If you find there are a *few* "majorities," you'll have more than one persona to define and organize details around. Those "groups" may be separated by distinct challenges, goals, or needs.

Once you've separated your personas out, infuse some life into them. Give them names and photos so your teams have a "face" they can speak to. (If it's for strictly internal use, you can even get photos from Google Images.) Include some quotes—drawn from customer interviews, blog comments, or social media posts—that exemplify how your persona speaks, what they're most concerned about, and what they ultimately want.

Share your persona/s with your teams. Have them hang the images and details up in their departments, or upload them to your [communication hub](#) so everyone can access them. This will ensure your voice and messaging is consistent across your organization. Your sales team will be better able to gauge which benefits to highlight when on the phone with which prospects. Your marketing team will better work their interests into the content they craft, and your *content* marketers will have a more robust SEO strategy. Your product team will add features *for* your personas, rather than creating what they want and hoping the target market will come.

Finally, remember that personas aren't static. They'll evolve as you discover more information about your customer segments. You'll make incremental refinements as new insights occur. So revisit and update to ensure your personas continue to align with the reality of your consumers. After all, the more aligned *they* are, the better you'll serve the people who are actually *out* there.

You've got your customer personas in place; now it's time for a little organizational soul-searching. Remember, you can't write a strong brand positioning statement—or position your brand firmly at all—if you try to offer something that your business is not uniquely capable of delivering. In the next section, we'll cover the "internal reflection" that will produce [your business's mission, vision, and core values](#).