



B2B buyer personas

TEMPLATE

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MARKETING
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Buyer personas – representations of your ideal customers – might sometimes be a neglected marketing tool, but they can be an incredibly useful way of understanding who you should really be trying to reach. This template will help make the process of creating buyer personas straightforward, saving you time and resources.

Persona names

1.

From your data gathering and analysis, how many buyer personas have you identified? What names have you given each of them to identify them? You'll need a separate template for each one.



Data gathering

2.

Outline how you have collected the data that informs each buyer persona you have identified. Methods might include face-to-face interviews, tele-research, online surveys or analytics. Outline your approach across each of the groups and channels questioned:

- Customers
- Prospects
- The sales team
- Customer services/client support
- Database analysis
- Website behaviour
- Social media and search behaviour



Company profile

3.

What kind of business or organisation does your persona work for? Think in terms of:

- Geography – is it a local business, regional, national, international or global? Where is it based?
- Size – how many employees are there and what is its annual revenue?
- Vertical – what industry type/sector is the organisation in?
- Lifecycle – what lifecycle stage is the business in (e.g. start-up, growth, maturity, decline)?
- Business culture – how would the employees describe the organisation's culture (e.g. fast-moving, innovative, agile, traditional, beaurocratic)?





Person profile

4.

4.1 Their job

- Age
- Gender
- Job title and job function/role
- Career path
- Tenure (how long have they been in their career and how long in their current role?)
- Reporting line

4.2 Their personality type: are they likely to be any of the following?

- Process driven
- Results driven
- Very ambitious
- Go-getting
- Risk-averse
- Change-averse
- Open-minded
- Set in their ways

4.3 Their working life

- Goals
- Barriers to success
- Challenges
- Pain points
- Hopes and fears
- Motivators
- Feelings

4.4 Their role as a buyer

How do they source and consume information? Think about the media consumed, information sources, social media and influencers.

4.5 Their role in the decision-making process:

- Budget versus influence: what is their degree of budgetary control and degree of influence on a purchase decision?

- Key decision criteria.
- Key success criteria.
- Likely objections to purchasing your solution.
- Preferred sales engagement experience – where/how do they prefer to buy and be sold to?

4.6 The problem and solution

- What problem are they looking to solve by making the purchase?
- What will their buying cycle look like? How long will each stage be?
- What will a successful solution purchase look like for them? What results will they want/expect to see?



The elevator pitch

5.

What two-paragraph, one-minute pitch will resonate most compellingly and effectively with this persona?

