HOW TO CREATE PERSONAS YOU CAN ACTUALLY USE

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Most companies have some version of a buyer persona document lying around. Most of them aren't that useful.

They're either too generic, too broad, or simply aren't specific enough about what matters most when you're talking with a customer: Pain. Customer conversations almost universally go better when we can quickly uncover (i) pain that (ii) our software can credibly solve. What makes this hard? Well, for one thing, there's never just one customer. Multiple people are involved in the software purchasing process, and they all have different jobs, sources of pain, and pieces of the product that they actually care about - and others that they don't. Speaking the language of each person involved is key to creating a quick connection, building trust in the sales process, and generating opportunities that actually close.

In order to connect with the multiple people involved in the buying process, marketers and salespeople need to understand the following:

1. *Who is involved in the buying process? (A simple list of the "players" we encounter)*
2. *What do they do and care about? (A general but accurate "day in the life" job description)*
3. *What are some sources of <u>real pain</u> for them that relate to our software?*
4. *What specific features of our product directly address that pain?*
5. *What success stories from other companies prove that we can effectively solve that pain and get them a result they need NOW?[1,2]*

Looks simple, right? Answering these questions is harder than it looks.

Here are three common mistakes we see when teams first try to clarify their buyer personas:

Mistake #1: Not getting specific enough. Most persona documents stop at #1 and only marginally address #2 from the list above. They may lay out some general business issues the person cares about, but they don't capture pain. Not really, anyway. Real pain is different from a simple work inconvenience. Real pain ruins your day. Real pain makes you come home, flop on the couch, and complain to your spouse (or roommate, or dog) about the deeply wounding injustice visited upon you during your workday. Real pain is personal, emotional, and it hurts. But even if you capture that, you haven't gone far enough. It's only when you have explicitly linked aspects of what we offer (and proof that it works) to their sources of pain that you can say you have a clear, usable persona. So get real about the people involved in your buying process. Go deep. And capture what matters: What hurts and how to fix it.

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[1] *These questions were inspired by the excellent persona guidelines found in both The Sales Enablement Playbook by Cory Bray / Hilmon Sorey and How to Demonstrate Software So People Buy It by Bryan Geery*

Mistake #2: Missing the "real pain." Yes, I already mentioned pain above. Yes, getting it right is that important. Watching Cory and Hilmon from ClozeLoop speak at our Revenue summit this past year was an eye-opening experience. Their presentation seemed simple enough. We all nodded our heads: "Yeah, yeah, we all know - uncovering pain is important." However, when we broke out into small groups, we all struggled to clearly articulate the source of "real, personal, acute pain" for our various customers. In a room full of extroverted salespeople, words were suddenly very limiting. Struggling here is normal. The only solution is to talk it out. Be comfortable iterating. Continue asking "how this ruins their day" until you feel you have it right. Bonus points for uncovering the different types of pain that can arise from settling for the status quo, "doing it yourself", and using other competitor's products. This part takes time, but it's worth the investment.
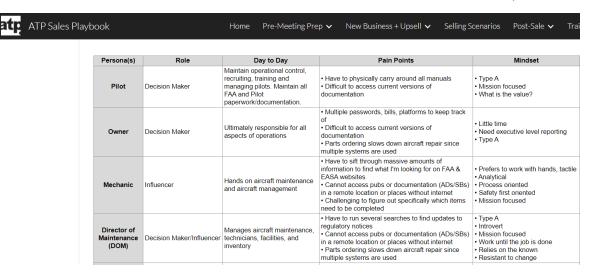
Mistake #3: Not summarizing things clearly. A persona is only good if it's simple, if it's digestible, and if the people who talk to your customers can actually use it to have a better conversation. This was a real problem for my team when I was selling data & research to investors in my past life. Persona documents existed, but they weren't organized in a way that let me refer to them when I was preparing for customer calls. Think of a good persona document like a cheat sheet. It should fit on one page (two at most) and should cover all of the "usual suspects" involved in the buying process. If it can't help a salesperson mid-customer conversation, it's not organized well enough.

Here's what a good starting point can look like. Putting a first draft of this together can be as easy as getting a few sales, marketing, and product people in the room and filling it in, box-by-box.

Persona	Day in the Life	"Ruin your day" pain points	Product Features and Angles	Success Stories + Social Proof
VP of IT				
CFO				
Financial Analyst				
Ops Director				

Here's another example from an actual sales playbook in our portfolio - the IS team at ATP. You can see that the same basic structure (persona, day-to-day, pain points) is present. ATP has also added a "mindset" column to capture each persona's general attitude about the buying process: Just another way of talking about the features and product attributes they care about.

Persona(s)	Role	Day to Day	Pain Points	Mindset
Pilot	Decision Maker	Maintain operational control, recruiting, training and managing pilots. Maintain all FAA and Pilot paperwork/documentation.	• Have to physically carry around all manuals • Difficult to access current versions of documentation	• Type A • Mission focused • What is the value?
Owner	Decision Maker	Ultimately responsible for all aspects of operations	• Multiple passwords, bills, platforms to keep track of • Difficult to access current versions of documentation • Parts ordering slows down aircraft repair since multiple systems are used	• Little time • Need executive level reporting • Type A
Mechanic	Influencer	Hands on aircraft maintenance and aircraft management	• Have to sift through massive amounts of information to find what I'm looking for on FAA & EASA websites • Cannot access pubs or documentation (ADs/SBs) in a remote location or places without internet • Challenging to figure out specifically which items need to be completed	• Prefers to work with hands, tactile • Analytical • Process oriented • Safety first oriented • Mission focused
Director of Maintenance (DOM)	Decision Maker/Influencer	Manages aircraft maintenance, technicians, facilities, and inventory	• Have to run several searches to find updates to regulatory notices • Cannot access pubs or documentation (ADs/SBs) in a remote location or places without internet • Parts ordering slows down aircraft repair since multiple systems are used	• Type A • Introvert • Mission focused • Work until the job is done • Relies on the known • Resistant to change

Completing a persona document doesn't change much. But when that document is used correctly, the "customer code-switching" it enables can be very, very powerful. As Brian Geery's fantastic book, How to Demonstrate Software so People Buy It, puts it, *"If you communicate with everyone the same way, you are not doing your job as a salesperson. **You need to be a chameleon**. It's the salesperson's job to communicate in the prospect's preferred style… and to be alert for changes in that style over time."*

This might be obvious, but personas aren't just for the sales team. Webinars, white papers, and other marketing efforts should all be constructed with a clear target in mind: a specific persona and a specific source of pain. One-size fits all content doesn't work. Trying to appeal to too many pain-points dilutes the message and loses the resonant power that comes when you really nail something that's ruining a potential customer's day right now. As author Ryan Holiday says in Perennial Seller, *"You must know what you are aiming for—you'll miss otherwise."*

My biggest piece of persona advice might be this: **Don't wait**. The information you need to build a clear picture of who you sell to and what they care about is right there in front of you. It's distributed amongst your team, just waiting to be tapped. Gather a few people that market, sell, and build your product. Put the persona grid on a screen. Then talk through it, box-by-box. Go deep. Focus on the pain. And summarize the end-result clearly, even if it doesn't quite seem done. (Here's a secret: It never really is.)

As you listen more, learn more, and sell more, your buyer personas can (and probably should) evolve. But here's what won't change: The need to create deep, trusting connections with the people your business serves. So, again, don't wait. Customers are just people, and people all want the same thing. To be understood. That's what a good persona can do for you. You'll know you've got it right when you start to hear these four words a little more often: "You guys get it."

Start with that end in mind. And start soon.

Your customers are waiting.