7 Buyer Persona Mistakes (and How You Can Avoid Them)

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NOVEMBER 2, 2017 | CONTENT JAM - CHICAGO, IL

67%

of people unsubscribe from a brand's emails because they're irrelevant or sent too often

Level Up Your Conversion Rate Optimization! ▭ ▬▬▬▬

▬▬▬▬▬▬▬
to me ▾

Hi Jared,

Thanks for downloading our ▬▬▬▬▬ Conversion Rate Optimization eBook--you now have the power to practice CRO.

Give me a shout if you have any questions around optimizing your website (or qualitative insights in general). These are just a few reasons you should be focused on CRO.

- Higher conversion rate = better ROI

- More cost effective than finding more visitors

- Defends against limited patience of visitors

Time to get your CRO on!

Also if you would like to schedule a quick demo/chat surrounding CRO or ▬▬▬▬, let me know or you can schedule a day and time that works best for you HERE.
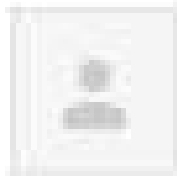
I look forward to hearing from you!

Best,

—

▬▬▬▬▬
Sales Development Representative, ▬▬▬▬
▬▬▬▬▬▬▬▬

Level Up Your Conversion Rate Optimization! 📁 ▬▬▬▬

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to me ▾

Hi - just wanted to make sure you got my email about Conversion Rate Optimization

Thanks!

On November 11, 2016 at 11:01 AM, ▬▬▬▬▬▬▬▬▬ wrote:

Gmail ▾

← | 🗑 | ⓘ | 🗑 | Move to Inbox | 🏷▾ | More ▾

COMPOSE

Inbox

Starred

Sent Mail

Spam (14)

Level Up Your Conversion Rate Optimization! 📁 ▬▬▬▬

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to me ▾

Just checking in. Wanted to make sure you got my email.

On November 11, 2016 at 11:01 AM, ▬▬▬▬▬▬▬ wrote:

Level Up Your Conversion Rate Optimization! ▭ ▬▬▬▬ x
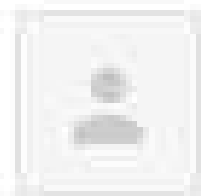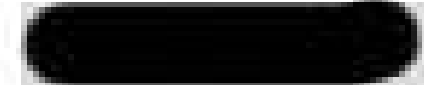
to me ▾

Thought I'd try you just one more time.

91%

of customers who had a bad experience won't willingly do business with your company again

Consumers
have changed.

Consumers don't just desire personalization in exchange for their data... they expect it.

62%

of consumers would be more likely to purchase from a brand if it gave them content that was more valuable, interesting or relevant

77%

of consumers have chosen, recommended or paid more for a brand
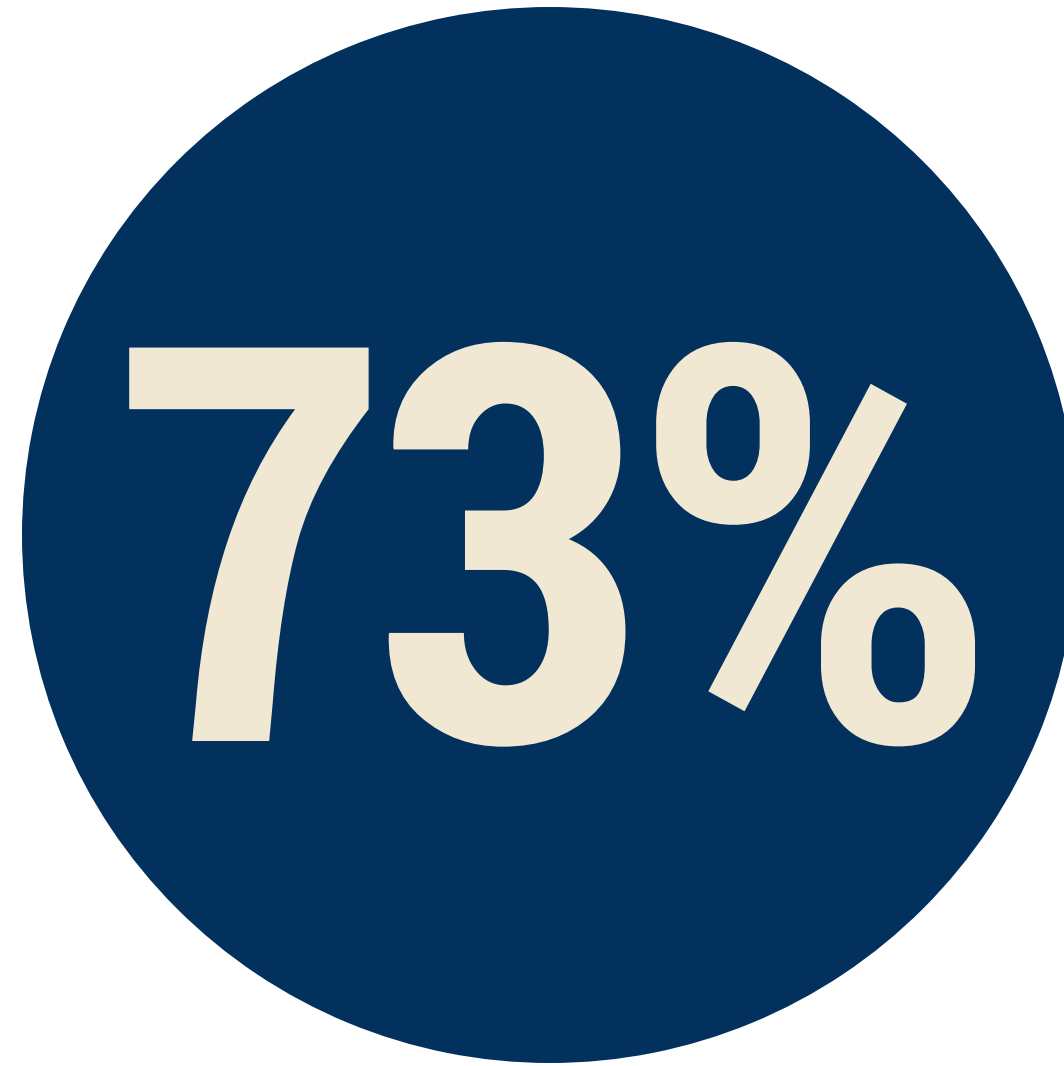that provides a personalized service or experience

"Marketers understand the concept of segmentation, and personalization is really modern-day segmentation."

ANN LEWNES - CMO, ADOBE

96%

of marketers agree that personalization helps to advance customer relationships

73%

of marketers believe they must deliver a personalized experience to be successful

To create content that is truly valuable to your customers, you have to understand who they are and what they need.

Deliver the right message, to the right audience, at the right time.

Deliver the right message,
to **the right audience**,
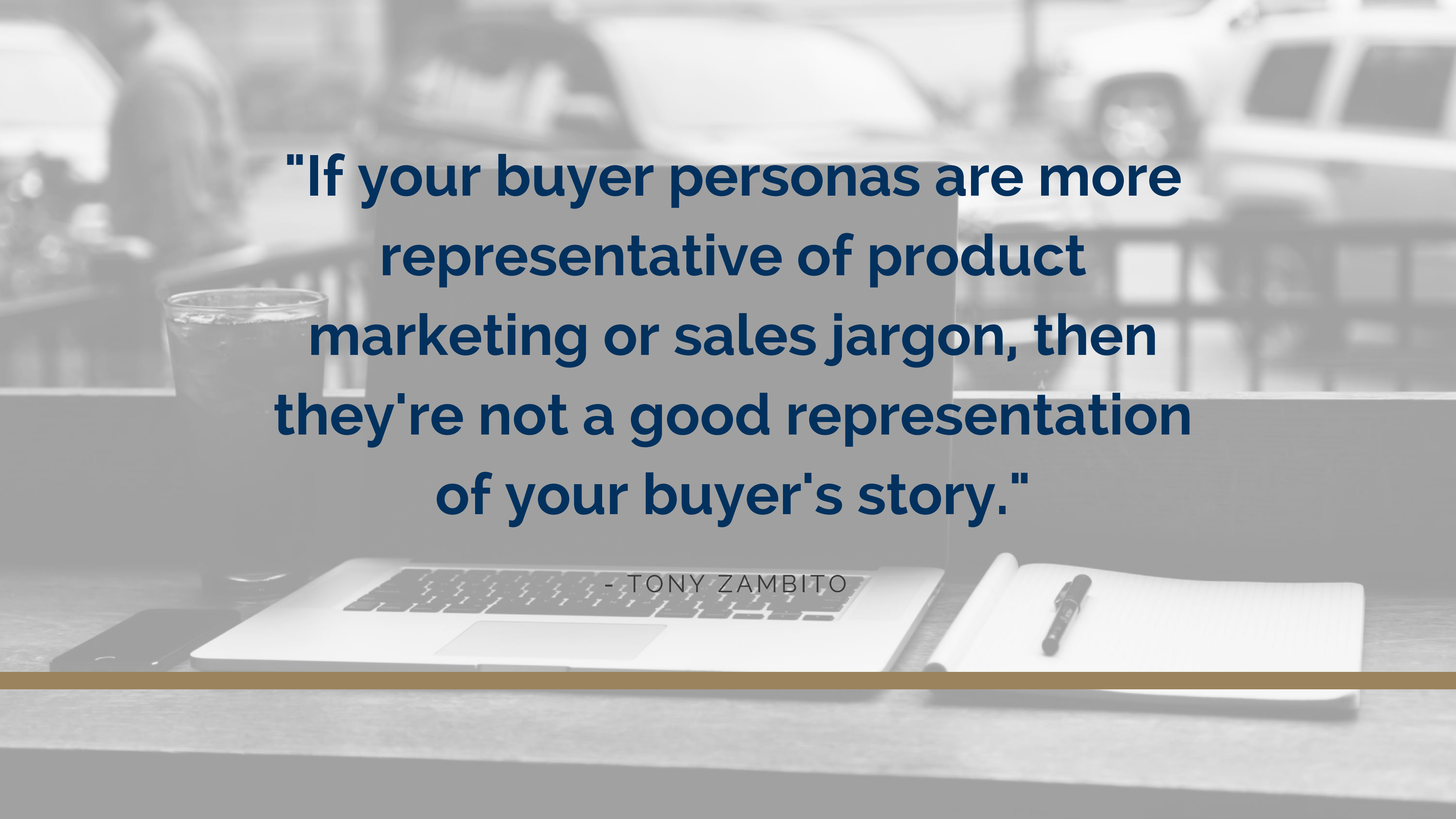at the right time.

Enter personas

persona

A single, archetypal representation of a cluster of your target audience that shares similar behaviours, goals, and motivations.

Why personas?

GOOD PERSONAS ANSWER THESE QUESTIONS:

- Who are we talking to?

- Why will they care?

- What are we going to say that's relevant to them?

"If your buyer personas are more representative of product marketing or sales jargon, then they're not a good representation of your buyer's story."
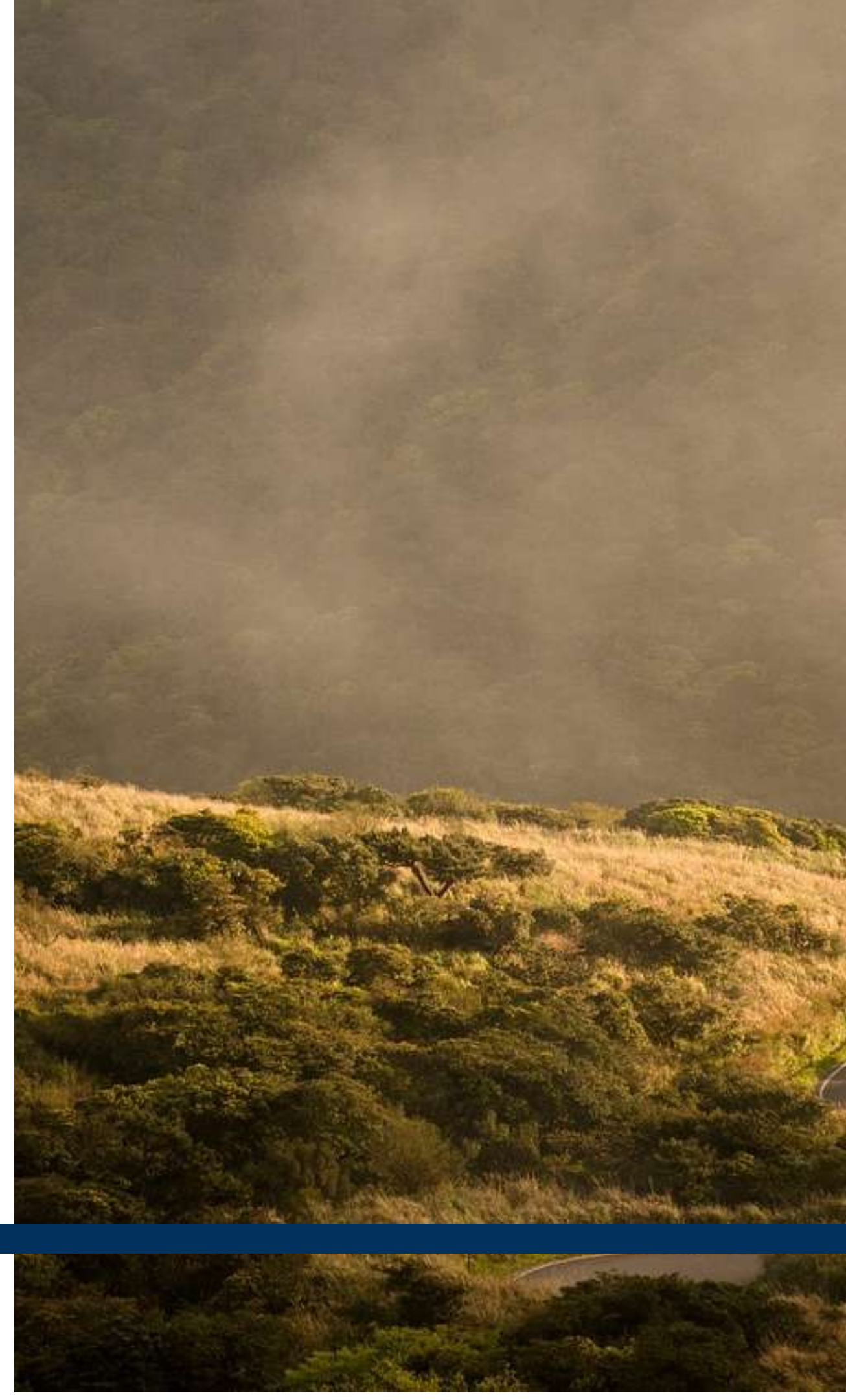
- TONY ZAMBITO

Why do personas work?

ONE WORD: EMPATHY

As humans, we have the ability to:

- Understand, relate to and share the feelings of other people

- Have the emotions, thoughts, beliefs and internal responses of a fictional character

1 Not Having Personas

"We know our customers."

93%

of companies who exceed lead and revenue goals report segmenting their database by persona

Clickthrough rate (CTR) on segmented emails is

100.95%

higher than non-segmented emails

Skytap Case Study:

210%
MORE WEBSITE TRAFFIC

97%
MORE LEADS

73%
MORE OPPORTUNITIES

Y U NO USE PERSONAS?!

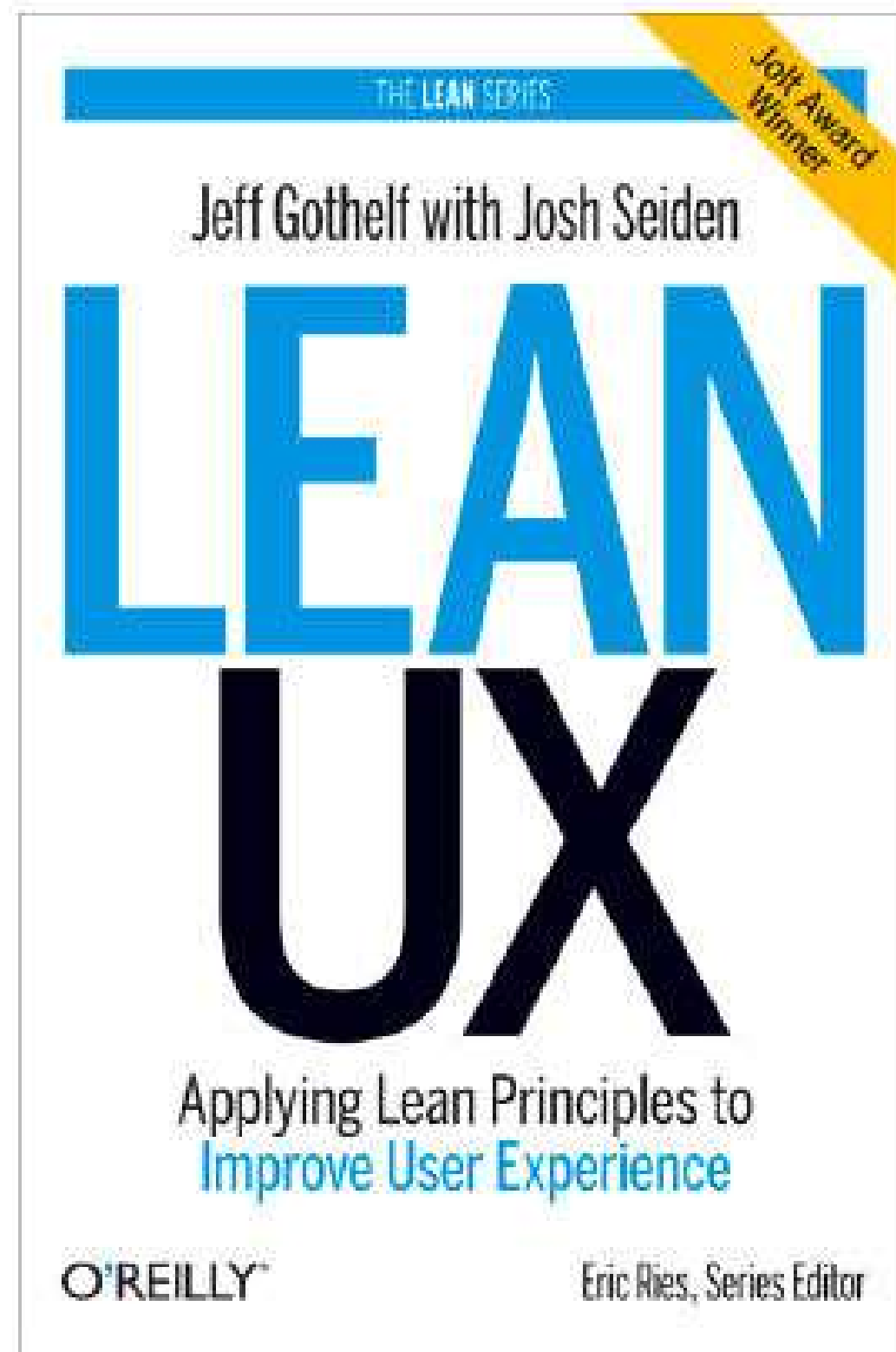# minimum viable persona

minimum viable persona

a persona created in a shorter timeframe with just enough detail to be actionable until it's expanded upon in future
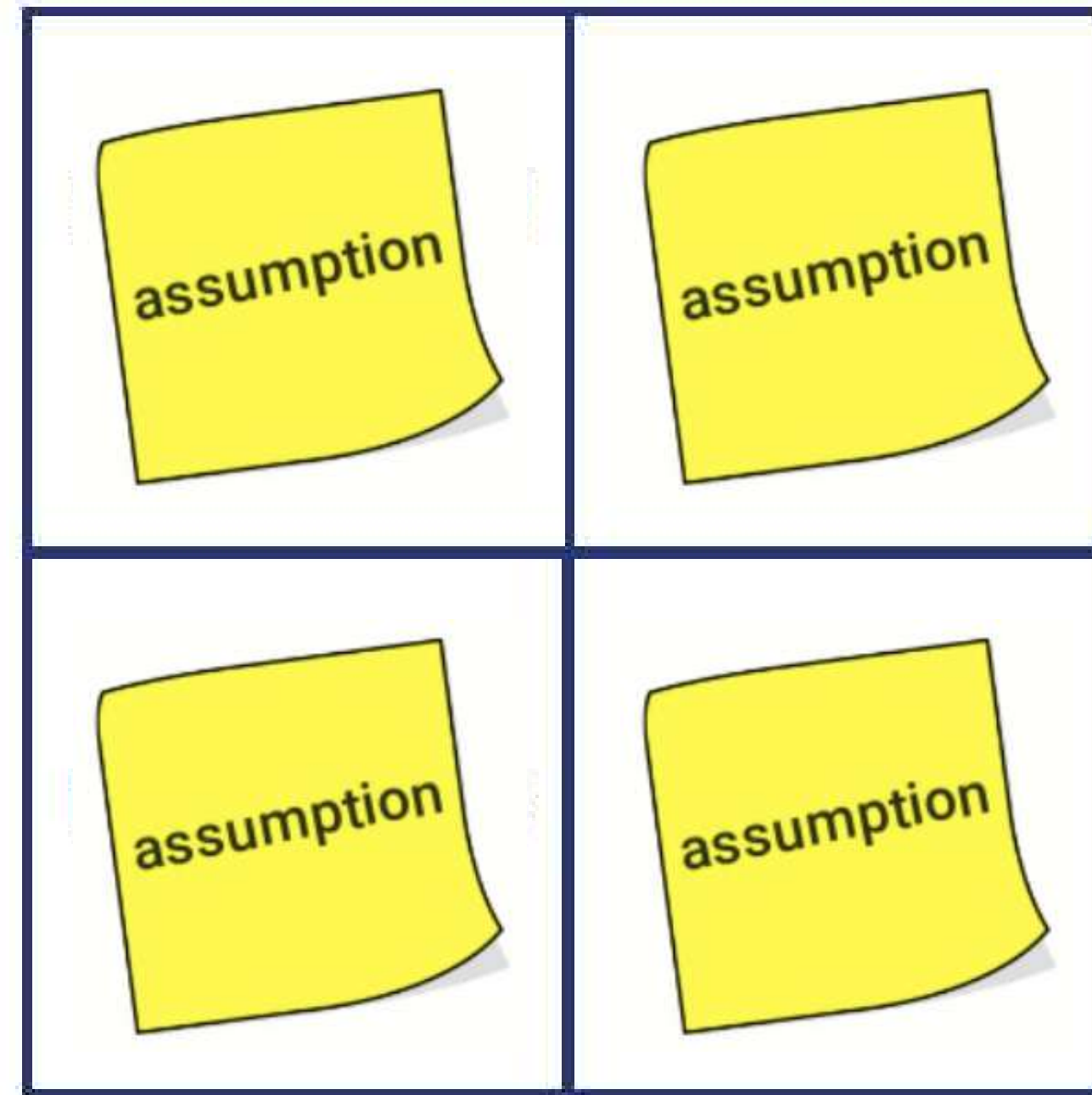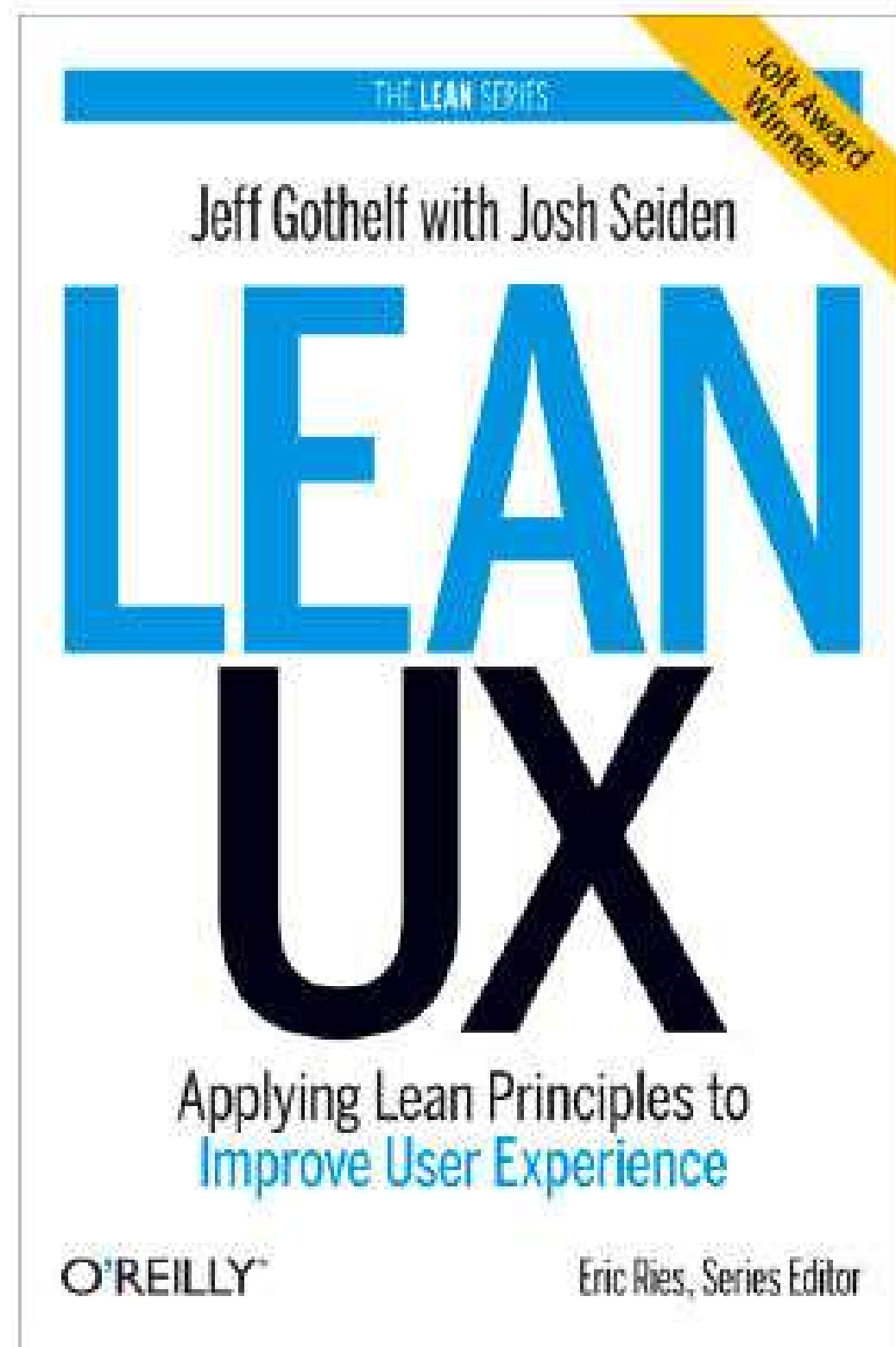
Assumption Mapping

Assumption Mapping

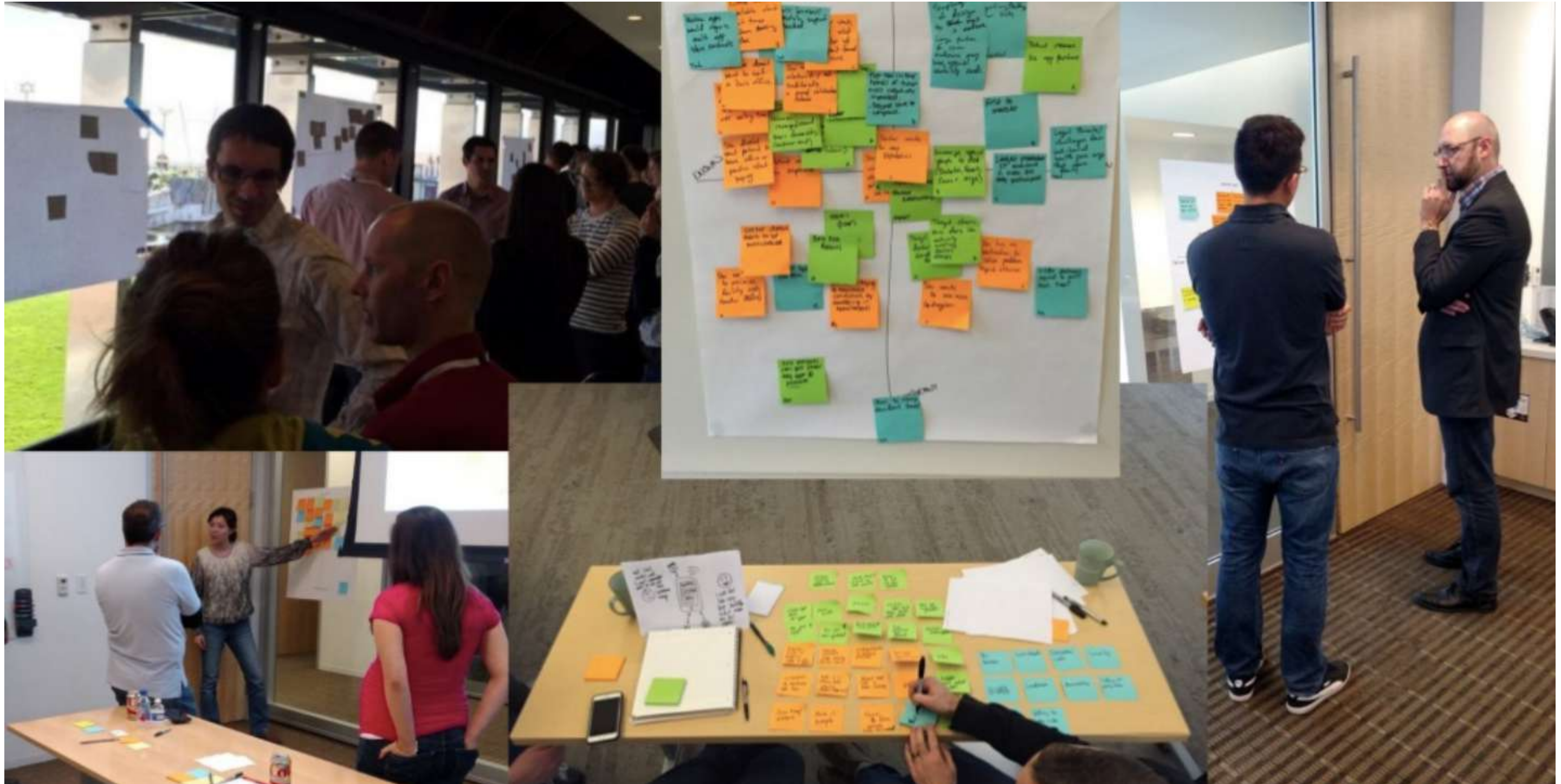- Collaborative workshop format
- Share and record existing knowledge and assumptions about customer segment(s)
- Captured with sticky notes or paper & markers
- Discussion and refinement

Jeff Gothelf with Josh Seiden

LEAN UX

Applying Lean Principles to
Improve User Experience

O'REILLY

Eric Ries, Series Editor

Biography and Picture	Behaviors & Beliefs
Demographics	Needs & Goals

Benefits

- Cheap and fast
- Combines different viewpoints
- Helps with stakeholder alignment & buy-in
- Quick transfer of knowledge

Tips:

- Have each participant explain their insights
- Find patterns across your findings
- If you discover multiple possible personas, always have one primary persona, the rest being secondary
- Prioritize by importance to your business

⚠️ **So far, this is only just a prototype persona ("proto persona")**

If a persona doesn't include voice of customer (VOC) data derived from qualitative research, then it's not a persona!

2 Relying On Demographic Information

"HR Sally has a Honda, two kids, lives in the suburbs, middle aged, loves dogs, and works in HR."

"That seems we've brought to life who this person is outside of her job title."

People still view personas only as demographics?

The Awesome Buyer Persona Word Doc Generator.

Need help making your persona? This step-by-step wizard will guide you through the process of creating your own personalised buyer persona.

Start Making My Persona! press ENTER

15% of survey respondents found buyer personas to be significantly effective, yet only 15% of respondents used in-depth qualitative research.

Remember:

If it doesn't include voice of customer (VoC) data derived from qualitative research, then it's not a persona!

Who to interview

- **Existing customers** (those who considered you and ultimately chose your product/service)
- **Competitors' customers** (who considered you but went with one of your competitors instead)
- **Former prospects** (those who considered you but opted not to make a decision at all)
- **People who use a similar product** or service and have never heard of your company

A few notes:

- Don't interview anyone currently in the sales process
- Interview people as close to the purchase decision as possible (no more than 6 months after)
- Make sure interviewers haven't had any prior interaction with the buyer at all
- If in software, conduct interviews before the buyers start using the product/get onboarded

How to find interviewees

- Sales team
- Customer success
- CRM
- Market research firms
- Convenience sample (friends, family, LinkedIn)

How many interviews?

- 20-25 total is a good target (usually 4-6 per persona)
- Trends are often observable from 5 interviews
- Law of diminishing returns applies
- More interviews will deepen your understanding

When you start hearing the same things over and over again, you'll know you've hit a sweet spot.

What questions should you ask?

3   Scripting Your Interviews

So, you're ready to
start interviewing...

Google

Google Search   I'm Feeling Lucky

You'll wonder:

- Which questions do I choose?
- How do I prioritize which ones to ask?
- Will I gain actionable insight from all of the questions I choose and ask?

Actual example questions from articles:

- What city were you born in?
- What's your level of education?
- What types of vehicles do you own and why?
- How many years of experience do you have?
- How many brothers and sisters do you have?

What's wrong with these questions?

They focus on the buyer, not the buying decision.

What vehicles a buyer owns or how many siblings they have doesn't tell you **WHY** they chose (or didn't choose) your solution.

You want detailed accounts of the customer's buying process, in their own words.

Things like...

- What drove them to start looking for a solution like yours
- Resistance they encountered along the way
- Where they went for information at each step of the journey
- Specific attributes of your product or service that factored into their comparison and decision

No scripts!

Scripted interviews...

Scripting drawbacks

- Comes off as an interrogation
- You're always thinking of the next question
- Leaves little room for follow-up questions and improvisation
- Often don't get deep enough to tap into the buyer's emotions at key stages of their journey

"Take me back to the day when you first decided to evaluate [product or service] and tell me what happened."

ADELE REVELLA - CEO, BUYER PERSONA INSTITUTE

Then, rely on active listening to ask insightful follow-up questions to get all of the information you need.

active listening

a communication technique requiring the listener to fully concentrate, understand, respond and then remember what is being said

4

Ignoring How Personas Interact with Each Other

"The number of people involved in B2B solutions purchases has climbed from an average of 5.4 two years ago to 6.8 today."

- HARVARD BUSINESS REVIEW (2017)

Example: Video conferencing solution

| CTO | SALES DIRECTOR | SOMEONE IN HR |

| IT MANAGER | INDIVIDUAL REPS | MARKETING MANAGER |

" Sales reps today rarely find a unilateral decision maker. More often, they discover that the authority to make decisions rests with groups of individuals—all of whom have different roles, and all of whom have veto power."

When interviewing, make sure to uncover:

- Who your interviewee interacts with daily
- Who influences them and who they influence
- What kind of pushback they received during the buying process and from who
- How consensus was reached among all parties

5

Not Using Your Personas

"Personas created in silo then imposed on others are rarely effective."

- NIELSEN NORMAN GROUP

Reasons personas aren't used:

- Too complicated
- Not communicated well
- Perception that they're not credible
- Unclear how to use them

- Hard to find
- Lack of support from ownership
- Weren't created by a cross-functional team

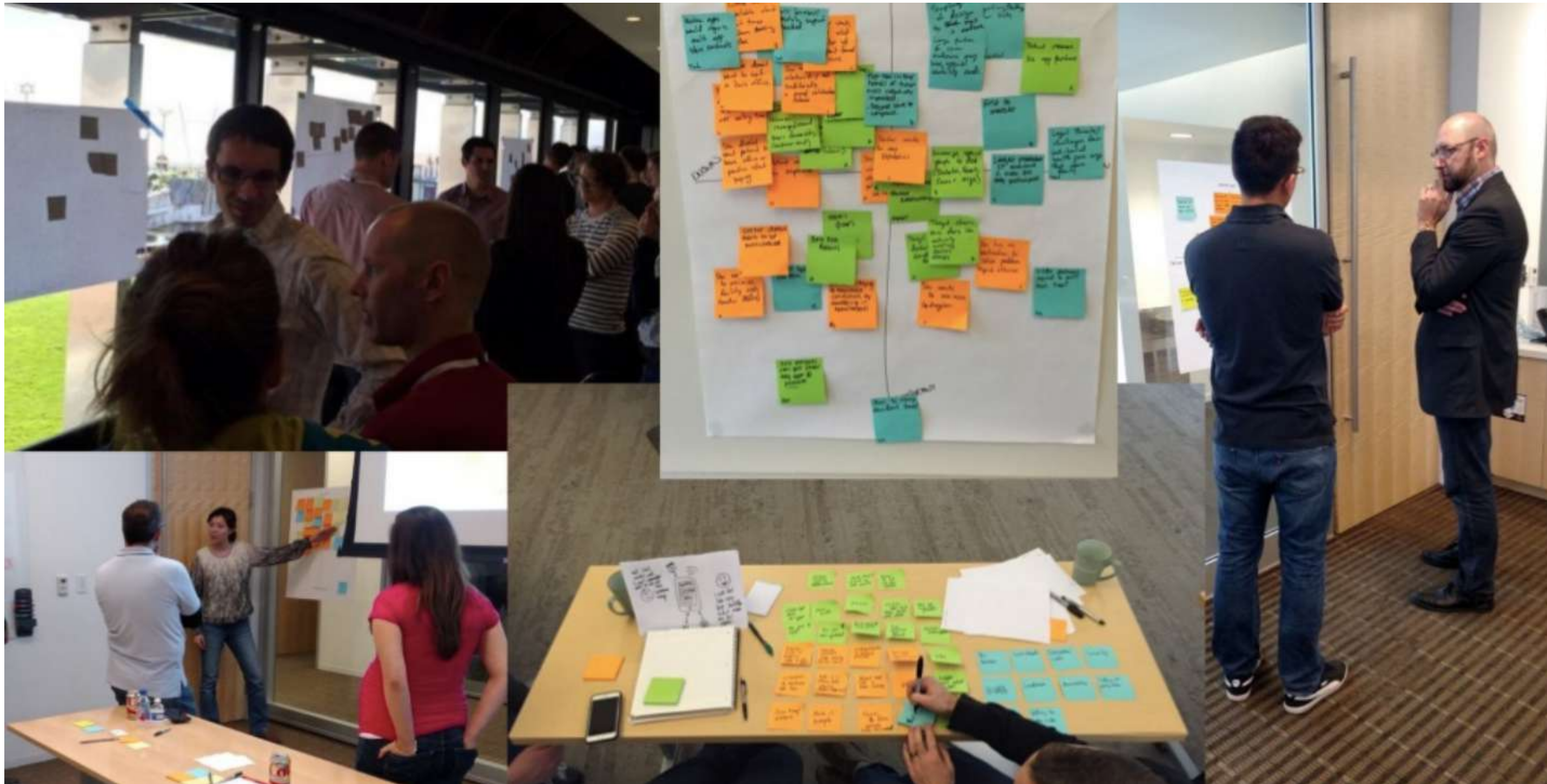# Much like content marketing, persona success comes down to one thing:

Much like content marketing, persona success comes down to one thing:

buy-in

How to help with buy-in

Remember assumption mapping?

Create a persona team

- Include the members from different departments that were involved in assumption mapping
- Helps evangelize personas across departments
- Keeps individual biases at bay

Set goals

Set goals

Prior to conducting research, set goals for how the persona will be used and how you'll act on the information you gain

Set goals

- "We want to understand what influences customers who have booked with us to book again"

- "We want to understand why people choose competitors X and Y over us"

Execute a communication strategy

Execute a communication strategy

- Show how you achieved your goals and what insight you gained

Execute a communication strategy

- Show how you achieved your goals and what insight you gained

- Use your persona team to help explain the methods and insights that drove creation
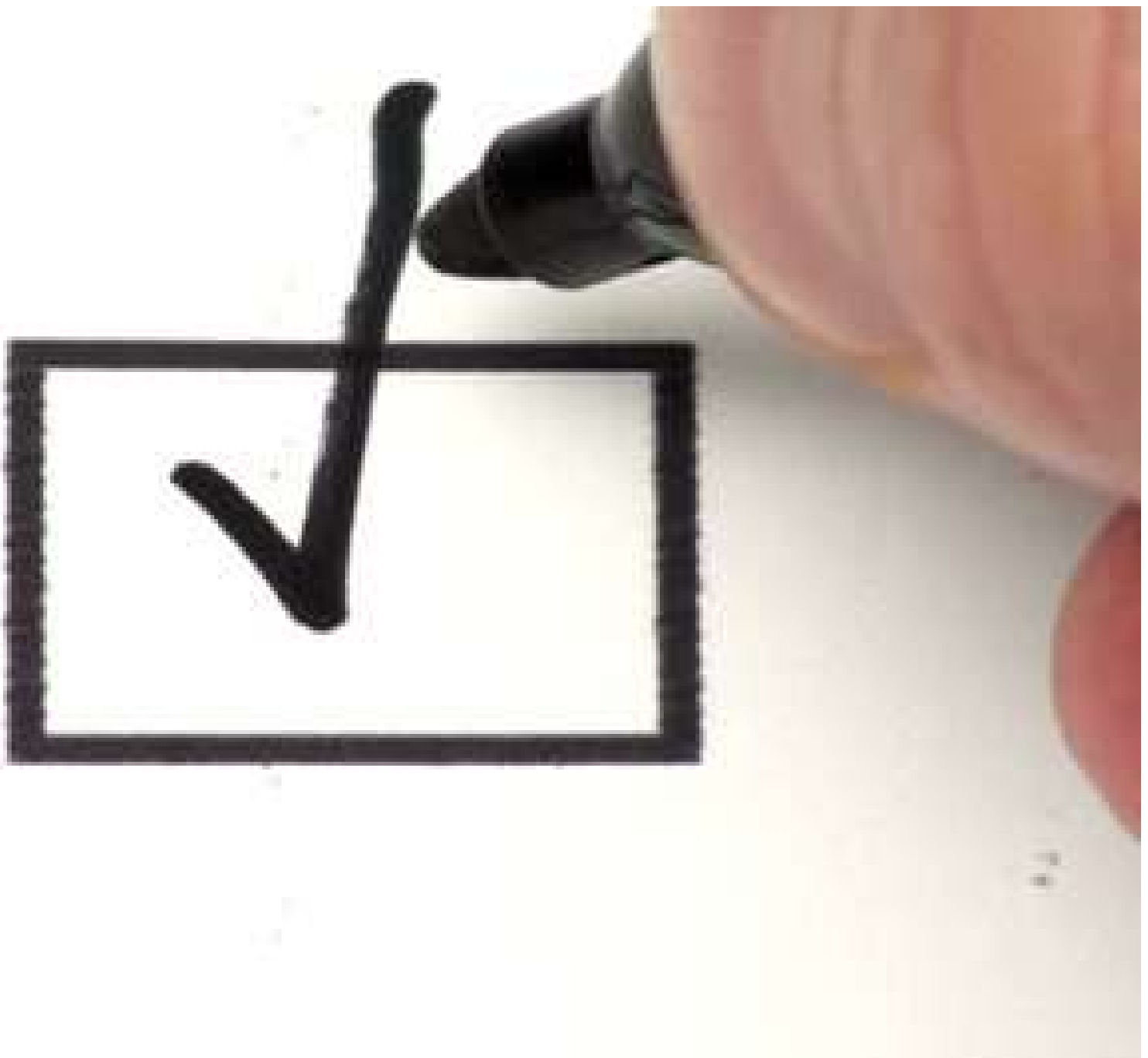
Execute a communication strategy

- Show how you achieved your goals and what insight you gained

- Use your persona team to help explain the methods and insights that drove creation

- Ongoing initiatives to educate departments how to use personas (WIIFM)

6 Never Updating Your Personas

"SET IT & FORGET IT"

Set it and forget it" is only valid when following all the instructional materials in the package.

"We've already done personas."

"Personas are not a document. These are just the final souvenirs, after the team has gained the real value. That value comes when the team visits and observes their target audience, absorbs and discusses their observations, and reduces the chaos into patterns, which then become the personas."
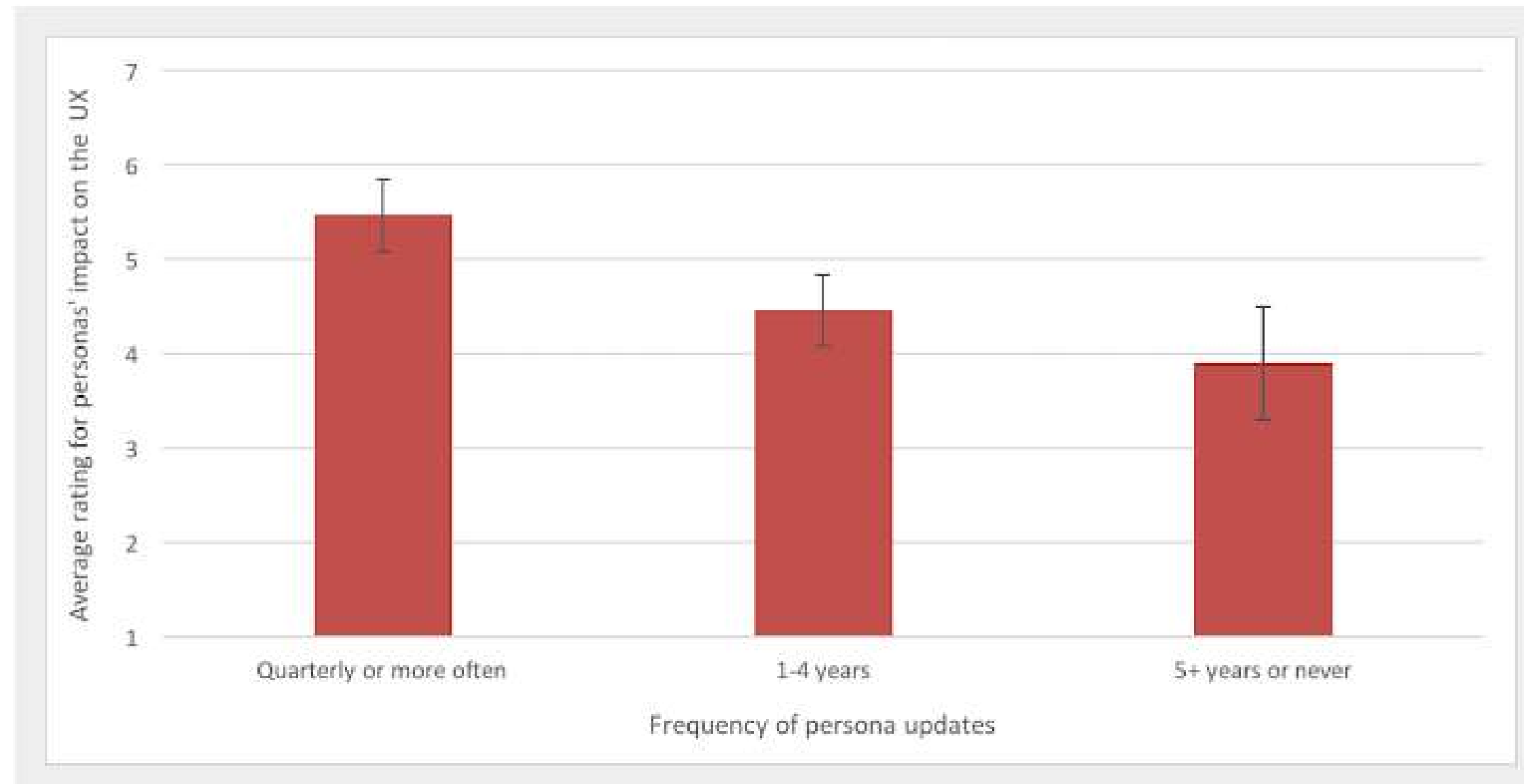
– JARED SPOOL, UIE FOUNDER

Your personas should be a living, breathing project updated regularly.

How often to update personas?
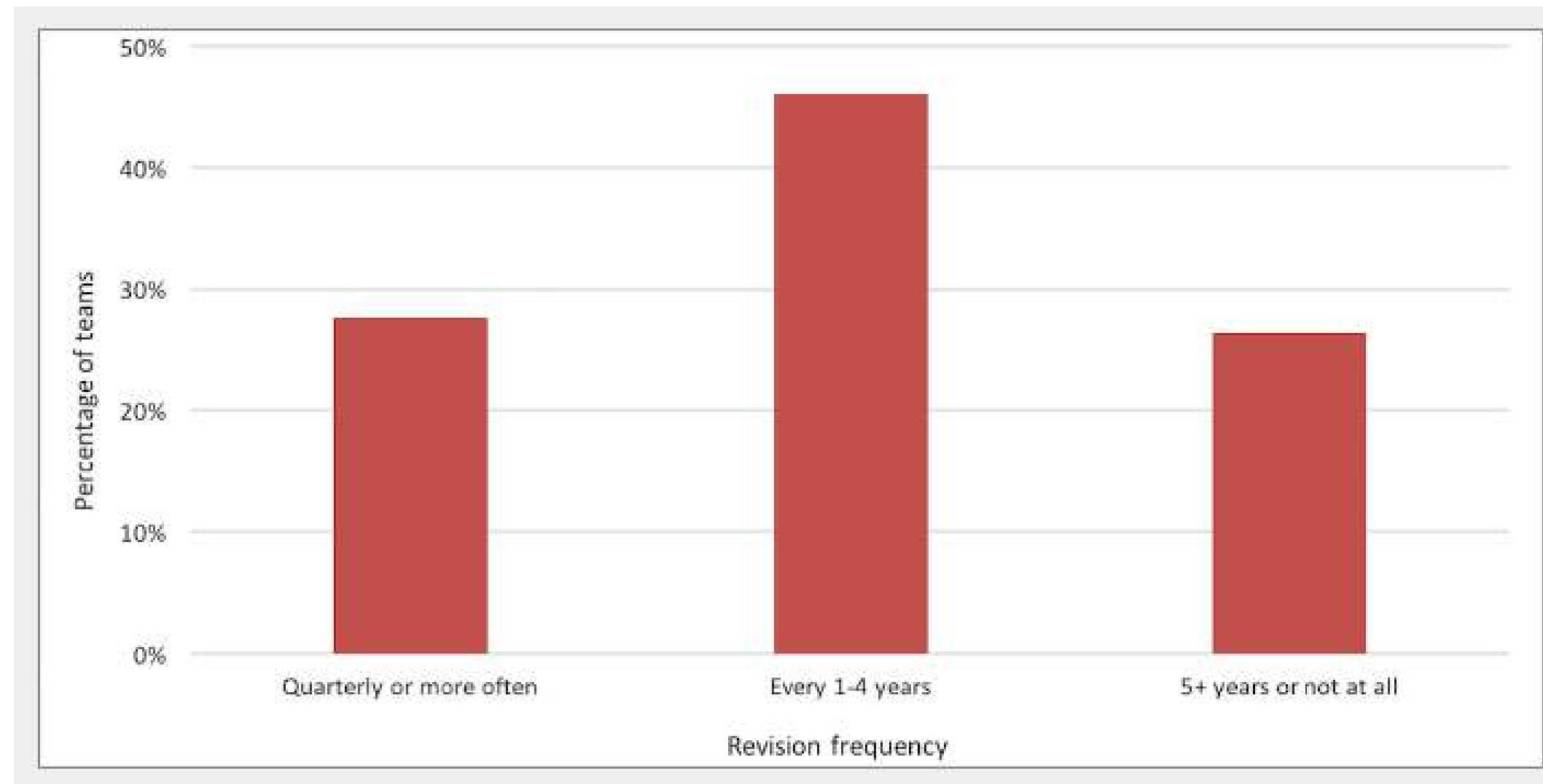
Perceived success:

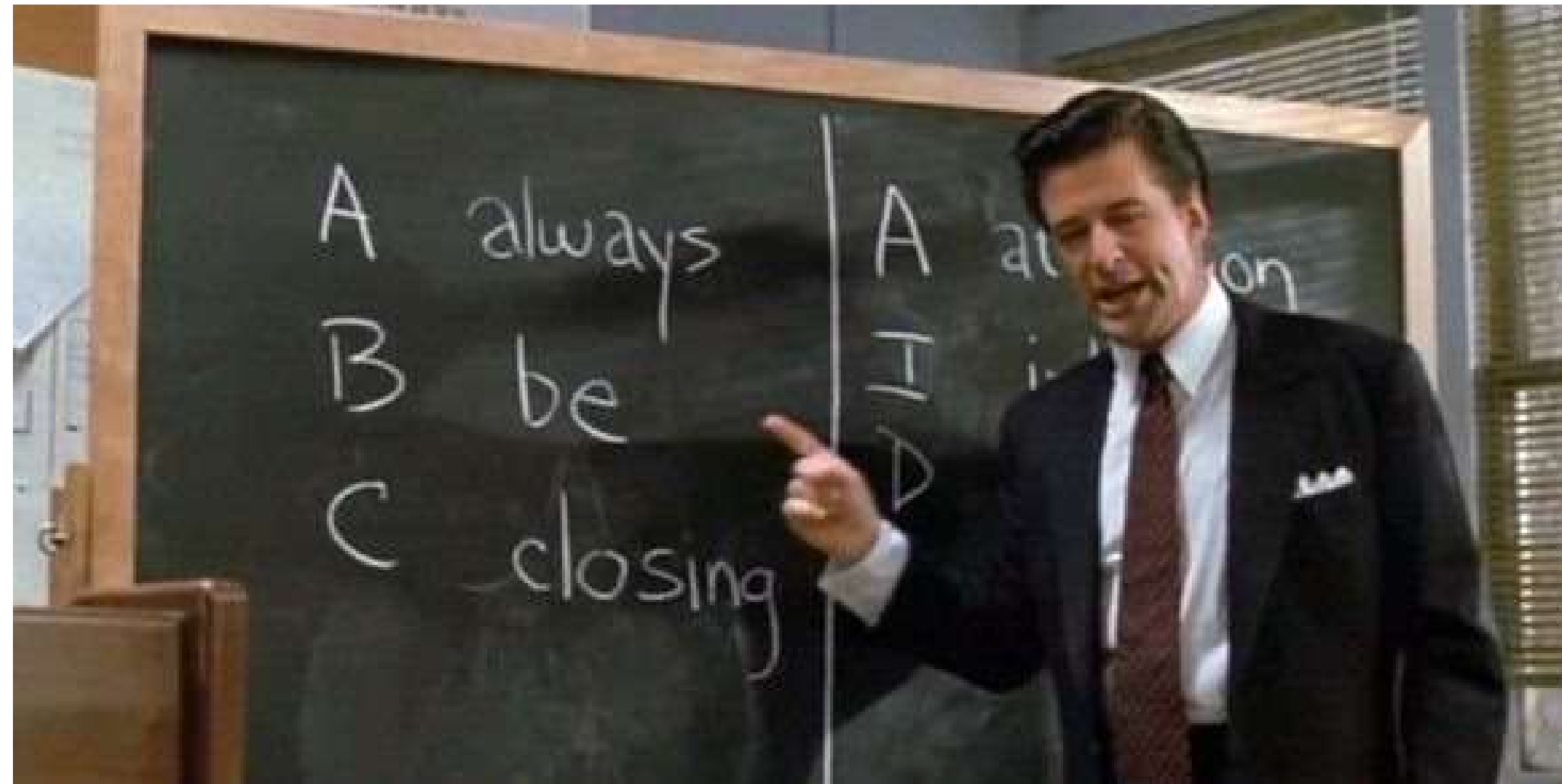# When should you update your personas?

Business changes

- New products or services
- Buyout or merger
- Change in company direction
- Entering into new markets or regions
- Competitor offerings have changed

Changes in user base

- Drop in organic search traffic
- Decline in email subscriptions or content downloads
- Analytics data
- Changes in support logs, tickets & calls

A lways
B e
V alidating

Even if you don't make phyical updates, use other research methods to constantly be validating your personas.

Such as...

- Focus groups
- Surveys
- Analytics
- Ethnographic research
- On-site polls
- User testing

7

Thinking Personas Are Only For Content

Yes, personas have a massive impact on your content marketing strategy…

Content

- Matches your content's voice and tone to your customer's
- Dictates what content to create and ensures it will resonate with your audience
- Allows you to audit your content and identify gaps in the buyer's journey

But when done correctly, persona research benefits all departments and lays the groundwork for a unified customer experience across the entire lifecycle.

Marketing

- Increase conversion rates on web and email after discovering the right messaging to use
- Know which PPC ads were most effective and at what stage of the buyer's journey
- Measure performance by persona to know what works and what needs adjusting

Sales

- Arm reps with critical buyer insights to help them close more deals
- Align sales and marketing in a mutually beneficial relationship
- Use regularly-updated persona findings in sales training materials

Customer Success

- Gives customers a consistent experience pre- and post-purchase
- Empowers CS team with extensive background on customers for better onboarding
- Feedback from CS team keeps personas up-to-date throughout customer lifecycle

To recap...

Use persona research to amp up your personalization efforts in 2018

Deliver the right message, to the right audience, at the right time.

Deliver the right message, to **the right audience**, at the right time.

7 persona mistakes:

1. Not having personas

2. Relying on demographic information

3. Scripting your interviews

4. Ignoring how personas interact with each other

5. Not using your personas

6. Never updating your personas

7. Thinking personas are only for content

How to avoid them:

1. Create minimum viable personas

2. Interview your customers

3. Actively listen in unscripted interviews

4. Identify influencers & influencing behaviors in interviews

5. Get buy-in across the company

6. Always be validating and refreshing personas

7. Use persona research across all internal departments

thank you

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