

TEMPLATE 3: CUSTOMER PERSONAS

File: `{COMPANY_SLUG}_personas.md`

PURPOSE: Provide customer insight and context to help agent adapt communication style and understand customer needs.

{COMPANY_NAME} Customer Profiles

Primary Customer Types

{CUSTOMER_TYPE_1}

- **Profile:** {CUSTOMER_1_DESCRIPTION}
- **Typical Projects:** {CUSTOMER_1_PROJECTS}
- **Communication Style:** {CUSTOMER_1_COMMUNICATION}
- **Decision Process:** {CUSTOMER_1_DECISIONS}
- **Pain Points:** {CUSTOMER_1_PAIN_POINTS}
- **Priorities:** {CUSTOMER_1_PRIORITIES}

{CUSTOMER_TYPE_2}

- **Profile:** {CUSTOMER_2_DESCRIPTION}
- **Typical Projects:** {CUSTOMER_2_PROJECTS}
- **Communication Style:** {CUSTOMER_2_COMMUNICATION}
- **Decision Process:** {CUSTOMER_2_DECISIONS}
- **Pain Points:** {CUSTOMER_2_PAIN_POINTS}
- **Priorities:** {CUSTOMER_2_PRIORITIES}

{CUSTOMER_TYPE_3}

- **Profile:** {CUSTOMER_3_DESCRIPTION}
- **Typical Projects:** {CUSTOMER_3_PROJECTS}
- **Communication Style:** {CUSTOMER_3_COMMUNICATION}
- **Decision Process:** {CUSTOMER_3_DECISIONS}
- **Pain Points:** {CUSTOMER_3_PAIN_POINTS}
- **Priorities:** {CUSTOMER_3_PRIORITIES}

Customer Scenarios

Scenario: {SCENARIO_1_NAME}

Context: {SCENARIO_1_CONTEXT} **Customer Need:** {SCENARIO_1_NEED} **Our Solution:** {SCENARIO_1_SOLUTION} **Value Delivered:** {SCENARIO_1_VALUE}

Scenario: {SCENARIO_2_NAME}

Context: {SCENARIO_2_CONTEXT} **Customer Need:** {SCENARIO_2_NEED} **Our Solution:** {SCENARIO_2_SOLUTION} **Value Delivered:** {SCENARIO_2_VALUE}

Industry Context

- **Market Dynamics:** {MARKET_DYNAMICS}
- **Seasonal Patterns:** {SEASONAL_INFO}
- **Common Challenges:** {INDUSTRY_CHALLENGES}
- **Trends:** {INDUSTRY_TRENDS}

PLACEHOLDER FILLING GUIDE:

Placeholder	Description	Example
{COMPANY_NAME}	Full company name	"NextDaySteel"
{CUSTOMER_TYPE_1}	Primary customer type	"Large Contractors"
{CUSTOMER_1_DESCRIPTION}	Who they are	"Major construction companies with multiple concurrent projects, 50+ employees"
{CUSTOMER_1_PROJECTS}	What they work on	"Commercial buildings, infrastructure, housing developments"
{CUSTOMER_1_COMMUNICATION}	How they prefer to communicate	"Direct and efficient, appreciate detailed technical information"
{CUSTOMER_1_DECISIONS}	How they make decisions	"Multiple stakeholders, formal procurement process, price-sensitive"
{CUSTOMER_1_PAIN_POINTS}	Their main challenges	"Tight project deadlines, supplier reliability, cost management"
{CUSTOMER_1_PRIORITIES}	What matters most	"Reliable delivery, competitive pricing, technical support"
{CUSTOMER_TYPE_2}	Second customer type	"Medium Contractors"
{CUSTOMER_2_DESCRIPTION}	Who they are	"Family-owned or regional construction companies, 10-50 employees"
{CUSTOMER_2_PROJECTS}	What they work on	"Local housing, commercial fit-outs, renovation projects"
{CUSTOMER_2_COMMUNICATION}	How they prefer to communicate	"Personal relationships, prefer phone calls, value recommendations"
{CUSTOMER_2_DECISIONS}	How they make decisions	"Owner/manager decides, relationship-based, trust important"
{CUSTOMER_2_PAIN_POINTS}	Their main challenges	"Cash flow management, finding reliable suppliers, project scheduling"
{CUSTOMER_2_PRIORITIES}	What matters most	"Trust and reliability, flexible terms, personal service"
{CUSTOMER_TYPE_3}	Third customer type	"DIY/Homeowners"
{CUSTOMER_3_DESCRIPTION}	Who they are	"Homeowners undertaking serious construction projects"
{CUSTOMER_3_PROJECTS}	What they work on	"Extensions, garden projects, structural modifications"
{CUSTOMER_3_COMMUNICATION}	How they prefer to communicate	"Need guidance and education, appreciate patience and explanation"
{CUSTOMER_3_DECISIONS}	How they make decisions	"Individual or family decision, research-heavy, price-conscious"

Placeholder	Description	Example
{CUSTOMER_3_PAIN_POINTS}	Their main challenges	"Understanding requirements, finding right products, minimum orders"
{CUSTOMER_3_PRIORITIES}	What matters most	"No minimum orders, helpful guidance, fair pricing"
{SCENARIO_1_NAME}	First scenario name	"Emergency Delivery"
{SCENARIO_1_CONTEXT}	Situation description	"Major contractor's regular supplier fails to deliver"
{SCENARIO_1_NEED}	What customer needs	"Urgent steel delivery to avoid project delays"
{SCENARIO_1_SOLUTION}	How you help	"Next-day delivery of exact specifications"
{SCENARIO_1_VALUE}	Value provided	"Project stays on schedule, contractor avoids penalties"
{SCENARIO_2_NAME}	Second scenario name	"Small Project Support"
{SCENARIO_2_CONTEXT}	Situation description	"DIY customer can't meet minimum order requirements elsewhere"
{SCENARIO_2_NEED}	What customer needs	"Small quantity of specific steel mesh"
{SCENARIO_2_SOLUTION}	How you help	"No minimum order policy enables small purchase"
{SCENARIO_2_VALUE}	Value provided	"Customer completes project without excess inventory"
{MARKET_DYNAMICS}	Industry context	"Construction industry driven by housing demand and infrastructure investment"
{SEASONAL_INFO}	Seasonal patterns	"Peak demand spring/summer, slower winter months"
{INDUSTRY_CHALLENGES}	Common industry issues	"Material price volatility, skilled labor shortage, regulatory compliance"
{INDUSTRY_TRENDS}	Current trends	"Sustainable construction, prefabrication, digital procurement"

QUALITY CHECKLIST:

- ☐ All placeholders replaced with realistic customer descriptions
- ☐ No behavioral instructions for how to talk to customers
- ☐ Customer types reflect actual target market
- ☐ Communication styles are observational, not prescriptive
- ☐ Pain points are based on real customer feedback
- ☐ Scenarios reflect actual use cases you can deliver
- ☐ Industry context is accurate and current