



Creating Your Ideal Customer Persona

Customer Personas fire up your sales and marketing efforts, letting you generate more targeted, qualified leads and close more deals.

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What is a Customer Persona, Anyway?

A customer persona is like an 'identikit' picture of your ideal customer. It's a character you create to represent the people who you most want to buy from you.

You'll hear personas called other things:

- **Customer Avatar**
- **Buyer Persona**
- **Marketing Persona**

And others. They mean the same thing.

Customer personas are there to give you a human being to direct your marketing and sales efforts toward. They put a face on your segmentation. Without them it's all too easy to feel like you're selling to statistics. How often do you make a phone call or write an email to an individual—and how often do you direct what you're saying to a bunch of marketing stats? It's like speaking to thin air.



If you think it's uncomfortable for you, customers hate it even more. Customers are used to personalization—on Amazon and Netflix, in marketing emails... everywhere.

If your messages feel dry, generic, impersonal, customers vanish.

But personas solve that problem. Now you're writing emails, sales letters, listing presentations, and sales scripts for "Thelma the 30-something professional", or "Sam the Second Home Buyer". (Anyone remember Joe the Plumber?) You have the marketing data you need to address their pain points. But there's more to talking to people than appealing to their wallets.

You need to speak their language, too. Knowing what people do for a hobby, what car they drive even, what kind of food they prefer—all gives you a feel for them as a person.

So when they hear you on the phone or read your messages they feel like you're talking *to them*, not at them, in a way they can relate to.

That's what personas deliver. Some businesses even put cardboard cutouts of personas in the sales room!

How Many Personas Do You Need?

Businesses should have a persona for each major segment of great customers. Most customers are just OK, but most businesses have a few—typically about 5% to 10%—that are amazing.

They spend more. They leave great reviews. They tell their friends. Their contribution to your business is way out of proportion to their numbers. In fact, they are your business.

When you know that, you can start segmenting them and building a persona for each of them - big differences like gender, age or reason for buying can be the basis for making a new persona.

But it's best to start with just the very best customers you have. When you have a solid persona drawn up for that one segment, go back around and create an additional persona for another segment until you have all your best performing segments covered. Most businesses will wind up with maybe 5 or 6 personas, so we're not talking about making a game of Who's Who here.

Negative Personas:

Negative Personas describe the kind of person it's not worth selling to. Maybe they never buy. Maybe they sit in the pipeline forever. Maybe they're just not worth it—when they finally do pull the trigger you've spent too much time and energy for them to be worth it as a customer. Having personas of people you don't want to sell to lets you avoid wasting precious time and energy—as soon as you match them up with your negative persona, drop them!

Example Persona 1:

Name: Home Worker Helen

Demographics: 36, Married with 2 kids, runs ecommerce business from home.

Behaviors: Online shopper, credit card purchaser.

Interests: Ecommerce, nutrition, home gym/exercise.

Personal: Wants home business to replace traditional career; seeking security.

Your Business: Doesn't like 'hard sell,' likes control over when she gets information.



Example Persona 2:

Name: Ambitious Andy

Demographics: 25, single, moving to better neighborhood

Behaviors: Online shopper, lunchtime website browser

Interests: Sales and marketing, football, gym.

Personal: Oriented to financial success, status.

Your Business: Likes detailed information.



Building a Persona: The Process

How should you go about creating a customer persona?

Step 1: Information Gathering

Build your persona on the information you gather from surveys, CRM data, sales team feedback, website forms, and other sources. We'll go into this more below.

Step 2: Give It a Personality

Give your persona, at a minimum:

A Name + Description: "VA Victor" or "Second Home Sue" or "Relocation Reggie"—something that reminds you of their basic motivation to buy a property.



A Face: use Google Image Search, pick a photo from stock photography sites. Look for someone who matches your persona in terms of age and general appearance, and then narrow it down to someone who looks like a “Second Home Sue” to *you*.

Demographic: give them an age, kids, home, a job. Fill in their basic demographics to match the target segment. Make it specific—they’re 33, not ‘28-44;’ they drive a Honda Accord, not a ‘midsize family car.’

Needs and Goals: abstract this from the deeper data you’re going to collect about your customers. What are they looking at real estate for? Why are they considering buying a home? And what problem do they expect it to solve, or benefit will it bring, to their own life?

When you have a persona with a face, a problem, a goal, demographics and some background and other data, you have a person to sell to... not exactly like every single one of your best customers, but close enough that when you create marketing and sales materials, as long as you keep “Second Home Sue” in mind, you’re going to be on target.

What Do You Need to Know to Create a Customer Persona?

Personas work best when they combine accurate data from marketing and sales, with background information that can give them a human touch.

The Basics:

Building great personas starts with learning some basic information about your best customers.

Demographics:

The first place to start is with the basics of who your ideal customer is. Are they male or female? What’s their age? Can you classify them generationally—GenX, Millennial, Boomer?



Then move onto relationship status, level of education, family size, income, work. Selling to someone who already owns two homes, has a Master's degree and three children and is self-employed is going to be really different than selling to first-time buyers with Associate's degrees and no children.

Behaviors:

Here's where we start to dig a little deeper—don't worry, we'll be going over how you can learn about these aspects of your customers. Behaviors like where they vacation, whether they give to charity, and what they do online can all give you valuable information you can use to understand your ideal customers better and build a more accurate, effective persona.

When you understand who your customers are, and what they do, you're a whole lot closer to knowing who you're selling to, and how to sell to them.

Where do you find out?

Data can be gleaned from your CRM, or from website forms that capture demographic data. Behavioral data can come from sales teams, or from customer interviews and surveys.

But Wait, There's More...

Knowing basic information about your customers is only half the battle. If we're going to construct personas that are useful and help us generate more leads and more sales, we'll need to know a little more.

Interests:

So we know about your ideal customer in demographic terms. But who are they? Most of us wouldn't say that once you know how old we are, whether we're married or not and where we vacation, you know us. We'd say there's more to us than where we went to school or how much we earn. Customers are exactly the same: until we know what they're interested in, what they like, what they care about, we don't know them at all. And if we don't know them, we don't know how to sell to them.



Personal:

Going a little deeper again, what do your customers really want out of life? How does working with you get them closer to that goal? Where are they usually trying to be in 5 years, 10 years?

Suppose you know that your customers are mostly buying homes as investments. What are they planning to use that income for—plow it into a business, or buy a houseboat? Big difference. Talk percentages and investment opportunities to would-be freewheeling retirees and you'll hear the same dull clang in response you'd get if you talked about a life of leisure to an entrepreneur who's looking to launch a new business.

Your business:

How do your ideal customers interact with your business? What do they want out of those interactions? If they could change something, what would it be?

Where do you find out?

Even more than in other cases, deeper data like this is best acquired from customer and prospect interviews and sales team feedback. Checking out forums and social media can yield insights too.

Customer Persona Toolkit

Everything you need to know to create killer customer personas is right here. Laser targeted marketing and sales is within your grasp!

We'll start with the basics:



Demographics:

Where Do They Live?	
Age?	
Generation?	
Relationship Status?	
Education Level?	
Employer?	
Industry?	
Family Size?	
Homeowner or Renter?	
Other/Miscellaneous	

Behaviors:

Technology Adoption: Early or Late?	
Charitable Donations?	
Shopping Habits?	
Financial - Investment? Savings? Businesses?	
Purchase Behavior - What Do They Buy?	
Spending - Credit Card, Store Card, Paypal, Cash?	
Travel?	
Other/Miscellaneous	

Now, let's move on to the deeper questions!

Interests:

Professional Interests?	
Entertainment - Movies, TV, Books, Magazines?	
Family and Relationships - Dating, Marriage, Parenthood?	
Health and Wellness - Fitness, Diet, Nutrition, Meditation, Bodybuilding?	
Food and Drink - Eating Out, Favorite Drinks, Cooking, Bars?	
Hobbies and Activities - Arts and Music? Home and Garden? What about pets, politics, vehicles?	
Sports Teams?	
Other/Miscellaneous	

Personal:

Long Term Goals?	
View of the Past?	
Mid Term Plans?	
Values?	
Other/Miscellaneous	

Your business:

Reason for Buying?	
Concerns About Your Product?	
Concerns About Your Business?	
Expectations of You	
What Factor Would Have Changed Their Decision?	



About leadPops™

leadPops™ develops lead generation technology and marketing solutions for mortgage brokers, loan officers, Realtors, and insurance agents that are sick and tired of spending money on marketing without seeing results.

Most other companies build websites and landing pages that serve as 'online brochures', but what really matters isn't visits or clicks: it's leads. Our team focuses on creating digital experiences and lead conversion tools that entice potential customers to take action.

As the only Conversion as a Service (CaaS) platform serving the mortgage, real estate, and insurance industries, we help our clients increase sales by converting their anonymous web visitors and into tangible, qualified leads.

With leadPops™, you get the information you need to build relationships and make more sales.

Want to learn more? Go to:

www.leadPops.com

Or, contact us here:

855.532.3767 | Support@leadPops.com