Preliminary Persona Proposal
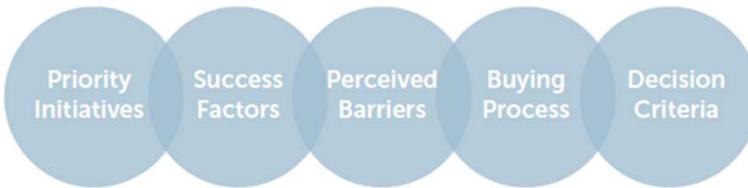
The Mx Group

Our Approach

The Mx Group follows the *5 Rings of Buying Insight™* persona framework to develop personas. In our view, the best way to produce engaging content and effective nurturing campaigns is to hear directly from your buyer. Not your customers (they no longer have the buyer mindset). Not your sales team (that's an interpretation of the buyer's voice). Only this laser focus on the buyer and their journey ensures that you will receive valuable and actionable insights that truly connect.

The 5 Rings of Buying Insight

Priority Initiatives | Success Factors | Perceived Barriers | Buying Process | Decision Criteria

"The biggest mistake marketers make is to profile their buyers instead of their buyers' decisions. After all, buying is the behavior markets want to influence." Adele Revella, The Buyer Persona Institute

Priority Initiatives:
What causes certain buyers to invest in solutions like yours, and what is different about buyers who are satisfied with the status quo?

Success Factors:
What operational or personal results does your buyer persona expect to achieve by purchasing this solution?

Perceived Barriers:
What concerns cause your buyer to believe that your solution or company is not their best option?

Buying Process:
What steps does your buyer take to evaluate their options and select a solution?

Decision Criteria:
Which aspects of the competing products, services, solutions or companies does your buyer perceive as most critical, and what are their expectations for each?

Persona Process

While the heart of the *Persona Process* is speaking directly with your buyer, we do leverage your internal team's knowledge and experience to add perspective to our research process.

Overview

Our goal in developing personas is to identify critical contrast points between buyer archetypes. Determining how we segment your market into personas and ultimately how many personas we author will be an iterative process. The planning and stakeholder discussions will help us create a hypothesis for the trait combinations that define the most valuable personas, while the findings from the e-surveys and buyer interviews will help us validate or make adjustments.

Planning & Target List Definition

We begin the *Persona Process* by working with you to develop a hypothesis on the number and make-up of the personas (both of which will be validated during the research process). This will enable us to identify the companies and contacts to target in our research process.

Stakeholders Questionnaire

Next, we ask key members of your organization to complete a comprehensive questionnaire or interview facilitated by our strategy team. The answers give us insight into your stakeholders' perspectives on the buyers in their market, including insight into typical interactions with buyers.

Your stakeholder team should include key members of marketing, sales and any other departments that interface with your market regularly.

Buyer Research

We kick off the buyer research with a series of e-surveys to your market (segmented by persona as necessary) with questions that align to the Five Rings of Buying Insight™. The purpose of these surveys is to obtain directional insights or themes that can be further explored during the 1:1 interviews. Also, depending on the make-up of the survey respondents, it may give us an opportunity to recruit for 1:1 interviews. *(E-surveys were eliminated to fit within the CASCADES marketing budget.)*

The 1:1 buyer interviews are the heart of the process. These interviews are again aligned to the Five Rings of Buying Insight and give us the opportunity to have deeper and more nuanced discussions about the themes uncovered by the e-surveys. For these interviews, it is important that we engage with people who recently went through their buying process. These can be either recent wins (new customers) or recent losses (those that went with a competitor or stayed with the status quo). We will plan on including both in the mix, but with an emphasis on recent losses. We recommend conducting 10 interviews per buyer persona to establish strong insights. We also recommend that you keep your personas fresh by conducting ongoing interviews with your buyers, at least on an annual basis.

Included in this process is a provision for contacting and scheduling the persona calls. As import as the calls are themselves, it's equally important to the success of the project to have an aggressive, full-time and professional approach to reaching out, "selling" the idea of the call and then actually scheduling the call.

Buyer Persona Deliverables

Using the insights gathered, The Mx Group will produce buyer personas for your key buyer archetypes. While the format for the end persona deliverables will be customized based on your final personas and insights gathered, the persona deliverables typically include the following information:

- Priority initiatives

- Success factors

- Perceived barriers

- Decision criteria

- Detailed buyer's journey

- Critical content needs

- Sources of influence / watering holes

- Role in decision-making process

- Message preferences

Examples of persona deliverables

Pricing Estimate

This pricing assumes we will create three personas.

Tactic	Mx Labor	Mx Pass-thru	Total
Kick-off/Discovery/Updated SOW/Project Management	$12,500		$12,500
Target list research & purchase (If necessary)	$1,250	$5,000	$6,250
Stakeholder interviews (1-2 panel sessions)	$2,000		$2,000
E-Survey plus List	$6,000		$6,000
Contact and scheduling management - $25 gift card	$5,000	$750	$5,750
Buyer 1:1 interviews (estimated at 30)	$19,000	$2,500	$21,500
Persona development (3)	$15,000		$15,000
Total	$60,750	$8,250	$69,000

Timeline

This timeline has been condensed as much as possible.

Milestone	Weeks																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Planning & target list definition 1 week	██																
Stakeholder insight gathering 2 weeks		██	██														
E-Survey 2 weeks				██	██												
Scheduling and Buyer insight gathering 8 weeks*					██	██	██	██	██	██	██	██					
Persona development 4 weeks													██	██	██	██	

* Dependent on availability of buyers

This is an estimate and does not represent a fixed project bid. This estimate is based on the scope of work to be completed for the project as described above. This estimate does not include additional time or labor that may be required should the project scope change or if additional time is needed to complete the job.

Approved by:

_____   _____
Signature   Date

About Us

Digital & Demand Gen Agency

More theory. More data. More tech. You've never had more tools at your disposal to generate demand. But along with this comes more expectations. Expectations not only to attract customers, but to convert and retain them. To perform the impossible and to prove it. To make 1+1=100 and to show your math.

At The Mx Group, we say, "OK, pass the pencil!" — With expertise across strategy, content, digital and demand. We help B2B marketers rise above their growing expectations. We make sense of today's marketing and sales technologies to make the most of data and automation. We create new assets — messages, websites and apps — that engage prospects and customers alike. We make it all work together to help you rise above the noise and focus on what really matters: driving reliable growth for your business.

The Mx Group

B2B Marketing Strategy
- Brand Strategy
- Buyer Strategy
- Sales & Marketing Alignment
- Demand Waterfall Forecasting
- Market Mapping
- Research & Insight

Design and Content
- Interactive Content
- Thought Leadership
- Video & Motion Graphics
- Outbound Content

Demand Gen and Lead Management
- Program Design, Asset Creation & Execution
- Marketing Technology Optimization
- Marketing Technology Outsourcing
- Lead Management
- Telemarketing Services
- Attribution, Analytics & Reporting

Web and Mobile App Development
- Digital Strategy Services
- Website Design & Development
- Website Optimization
- Mobile App Development

Current Clients
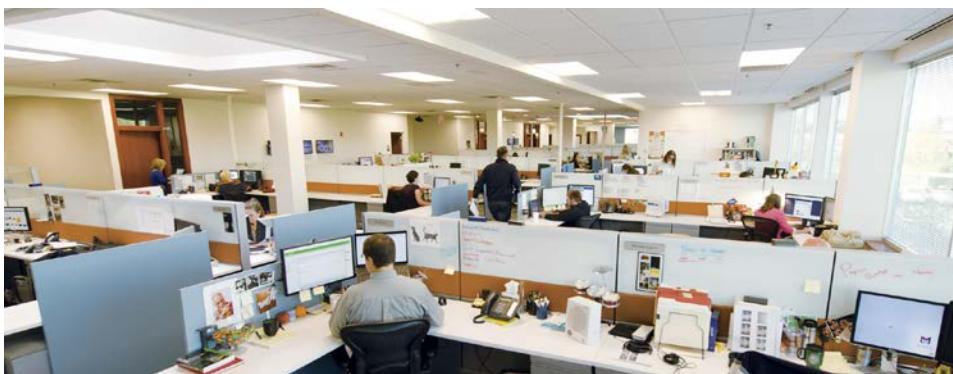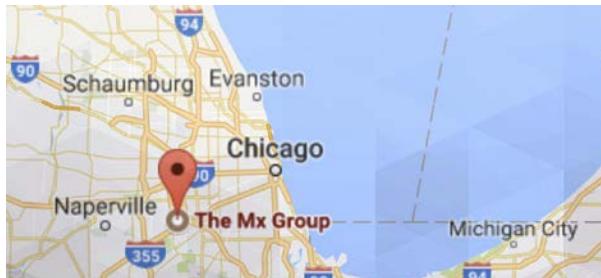
Abaco Systems | Abbott Diagnostics | Abbott Molecular | Alonti | Altran | Anvil International

ASSA ABLOY Hospitality | Atlas Copco | Belden | Benefit Mobile | Bosch Rexroth | BriovaRx

Certified Collectibles Group | Cox Automotive | DealShield | Deublin | Fairchild Semiconductor

General Electric (GE) | GG+A | Grundfos | Huron | Jones Lang LaSalle | JPW Industries

MAVERICK Technologies (A Division of Rockwell Automation National Automobile Dealers Association

NAVIS | Optum | RACO Manufacturing | SCA | Siemens | Tempur Sealy (Hospitality)

The Vitality Group | U.S. Tsubaki Power Transmission | vAuto | VinSolutions

WIN (Wireless Information Networks) | Wonderlic | Xtime | Zekelman Industries

TOP B2B AGENCY
- Ad Age

25+ years of driving REVENUE

Best Places to Work 2017
4TH consecutive year

Corporate Information

Company Name
The Mx Group

Ownership Structure
Privately held

Year Founded
1989

Total Number of Employees
110

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Thank you for considering us!

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