



The Mx Group

Persona Proposal

August 16, 2022

Your Need

Afresh wants to develop a robust, detailed set of personas that can serve as a shared, validated repository of understanding and knowledge about target buyers to enable consistency in messaging across teams for sales, marketing, and beyond.

Afresh needs to understand their key buyers in the roles of Chief Merchandising Officer (CMO), Chief Information/Technology Officer (CTO/CIO), and Chief Operations Officer (COO). The exact title can vary, our focus will be on the senior leadership for these functions.

While our targets are at the top 50 national grocery chains, for research purposes, we will expand our view slight to the top 100/150.

Why Personas

- An essential reminder that this is about human persuasion (and all that implies)
- Memorable and usable
- Focus marketers on critical contrast points between buyers (irrelevant complexity fades away)
- Guide development of content and tools for addressing specific pain, perception and proof points
- Enable understanding of relation to other personas, such as how they "sell" to each other
- Personas are useful beyond marketing — sales training, product development, HR, etc.

Mx Persona Model — Demand Focused

1. Buyer Ecosystem Summary
 - Buying Group Roles
 - Buyer Involvement
2. Individual Buyer Personas
 - Core Persona Info
 - 5 Rings of Insight
 - Buyer Journey Map
3. Optional Persona Expansions
 - Customer Journey Map
 - Content & Messaging Plans
 - Quantitative Media Study to validate qualitative media insights



Five Rings of Insight™

Buyer Persona
I N S T I T U T E
MARKETING PERSONIFIED



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?



The Buyer's Journey

This insight reveals details about the steps your buyer takes to evaluate their options and select one.



Decision Criteria

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

"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."

-The Buyer Persona Institute

Our Process

Gathering Data

- Historical sales data and lost orders reports
- Desk research

Stakeholder Collaboration

- Define persona hypothesis
- Understand what you already know and the insights needed
- Familiarize with the sales process

Listening

- Phone calls with recent buyers—both wins & losses
- Online quantitative surveys (optional)

Distillation of Insights

Defined Buyer Personas

Individual Buyer Persona



PERSONA NAME

INDUSTRY:
Fusce Ullamcorper

ORGANIZATION TYPE/PROFILE:
Fusce Ullamcorper, Dapibus Venenatis

REGION:
Fusce Ullamcorper

BUYING CENTER:
Fusce Ullamcorper

ROLE IN DECISION-MAKING PROCESS:

INITIATOR **SPONSOR** **END-USER** **INFLUENCER** **BLOCKER** **DECISION MAKER** **BUDGET HOLDER**

“ Maecenas sed diam eget risus varius blandit sit amet non magna. Donec ullamcorper nulla non metus auctor fringilla. Nulla vitae elit libero, a pharetra augue. Cras justo odio, dapibus ac facilisis in, egestas eget quam. Morbi leo risus, porta ac consectetur ac, vestibulum at eros. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Nulla vitae elit libero, a pharetra augue. ”

KEY TAKEAWAYS:

- Nullam id dolor id nibh ultricies vehicula quis risus eget urna mollis ornare vel eu.
- Donec ullamcorper nulla non metus auctor. Donec ullamcorper nulla non metus auctor fringilla.
- Vestibulum id ligula porta felis euismod semper.
- Lorem ipsum dolor sit amet, consectetur adipiscing. Sed posuere consectetur est at lobortis.
- Morbi leo risus, porta ac consectetur ac, vestibulum. Vestibulum id ligula porta felis euismod semper.
- Lorem ipsum dolor sit amet, consectetur adipiscing. Duis mollis, est non commodo luctus, nisi erat porttitor ligula, eget lacinia odio sem.
- Vestibulum id ligula porta felis euismod semper. Maecenas faucibus mollis interdum.

CORE PERSONA INFORMATION

POSSIBLE TITLES:

- Condimentum Sem
- Adipiscing Inceptos / Lorem Consectetur
- Pelleentesque Etiam / Pharetra Magna Sem
- Amet Magna Ridiculus / Vehicula Amet Venenatis

PERSONAL STATS:

- Age: 35-55
- Degree: B.S. (Electrical Engineering)
- Experience: 10+ Years

ROLES & RESPONSIBILITIES:

- Vestibulum id ligula porta felis euismod semper.
- Cras mattis consectetur purus sit amet fermentum.
- Maecenas sed diam eget risus varius blandit sit amet non magna.
- Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus.
- Vestibulum id ligula porta felis euismod semper.
- Cras mattis consectetur purus sit amet fermentum.

KEY INITIATIVES:

- Vestibulum id ligula porta felis euismod semper.
- Cras mattis consectetur purus sit amet fermentum.
- Maecenas sed diam eget risus varius blandit sit amet non magna.
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- Vestibulum id ligula porta felis euismod semper.
- Cras mattis consectetur purus sit amet fermentum.

KEY CHALLENGES:

- Vestibulum id ligula porta felis euismod semper.
- Cras mattis consectetur purus sit amet fermentum.
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- Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus.
- Vestibulum id ligula porta felis euismod semper.
- Cras mattis consectetur purus sit amet fermentum.

MEDIA HABITS:

- Preferred Source of Info: Maecenas sed diam eget risus varius blandit sit amet non magna
- Key Publications: Maecenas faucibus mollis interdum. Donec ullamcorper nulla non metus auctor fringilla.
- Social Media: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla vitae elit libero, a pharetra augue.
- Web Habits: Sed posuere consectetur est at lobortis. Nullam id dolor id nibh ultricies vehicula ut id elit.
- Email: Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec ullamcorper nulla non metus auctor fringilla.

SOURCES OF INFLUENCE:

- Vestibulum id ligula porta felis euismod semper.
- Cras mattis consectetur purus sit amet fermentum.
- Maecenas sed diam eget risus varius blandit sit amet non magna.

PREFERRED COMMUNICATION TYPES:

- Vestibulum id ligula porta felis euismod semper.
- Cras mattis consectetur purus sit amet fermentum.
- Maecenas sed diam eget risus varius blandit sit amet non magna.

PREFERRED COMMUNICATION TACTICS:

- Fusce dapibus tellus ac cursus commodo tortor mauris condimentum nibh ut fermentum
- Duis mollis est non commodo luctus nisi erat porttitor ligula eget lacinia odio sem nec elit.
- Duis mollis, est non commodo luctus nisi erat porttitor ligula eget lacinia odio sem nec elit

HOW TO EARN A SALES VISIT:

- Vestibulum id ligula porta felis euismod semper.
- Cras mattis consectetur purus sit amet fermentum.
- Maecenas sed diam eget risus varius blandit sit amet non magna.

LEXICON

- Vestibulum id ligula porta felis euismod semper.
- Cras mattis consectetur purus sit amet fermentum.
- Maecenas sed diam eget risus varius blandit sit amet non magna.

Individual Buyer Persona

PERSONA–PRODUCT CONNECTION

Product/Solution: Lorem Malesuada Etiam

FIVE RINGS OF INSIGHT™

Buyer Persona
INSTITUTE
MARKETING PERSONIFIED

Market Maturity: New Concept New Paradigm Established Market

1. PRIORITY INITIATIVES	2. SUCCESS FACTORS	3. PERCEIVED BARRIERS	4. BUYING PROCESS	5. DECISION CRITERIA
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Praesent commodo cursus magna, vel scelerisque nisl consectetur et. Donec sed odio dui. Donec id elit non mi porta gravida at eget metus. Aenean eu leo quam. Pellentesque ornare sem lacinia quam venenatis vestibulum. Sed posuere consectetur est at lobortis. Vestibulum id ligula porta felis euismod semper. Cras justo odio, dapibus ac facilisis in, egestas eget quam. Morbi leo risus, porta ac consectetur ac, vestibulum at eros.

Individual Buyer Persona

BUYER JOURNEY MAP

Product/Solution: Lorem Malesuada Etiam

	EDUCATION Loosening of the Status Quo Committing to Change	SOLUTION Exploring Possible Solutions Committing to a Solution	VENDOR SELECTION Justifying the Decision Making the Selection
Goal	Sed posuere consectetur est at lobortis. Duis mollis, est non commodo luctus, nisi erat porttitor ligula, eget lacinia odio sem nec.	Sed posuere consectetur est at lobortis. Duis mollis, est non commodo luctus, nisi erat porttitor ligula, eget lacinia odio sem nec.	Sed posuere consectetur est at lobortis. Duis mollis, est non commodo luctus, nisi erat porttitor ligula, eget lacinia odio sem nec.
Involvement	<div style="width: 50%;"> </div>	<div style="width: 50%;"> </div>	<div style="width: 50%;"> </div>
Asking	<p>"Donec id elit non mi porta gravida at eget metus. Nullam id dolor id nibh ultricies vehicula ut id elit. Maecenas faucibus mollis interdum."</p> <p>"Aenean eu leo quam. Pellentesque ornare sem lacinia quam venenatis vestibulum."</p> <p>"Fusce dapibus, tellus ac cursus commodo, tortor mauris condimentum nibh, ut fermentum massa justo sit amet risus. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus."</p> <p>"Nullam id dolor id nibh ultricies vehicula ut id elit. Aenean eu leo quam. Pellentesque ornare sem lacinia quam venenatis vestibulum."</p> <p>"Sed posuere consectetur est at lobortis. Duis mollis, est non commodo luctus, nisi erat porttitor ligula, eget lacinia odio sem nec."</p>	<p>"Donec id elit non mi porta gravida at eget metus. Nullam id dolor id nibh ultricies vehicula ut id elit. Maecenas faucibus mollis interdum."</p> <p>"Aenean eu leo quam. Pellentesque ornare sem lacinia quam venenatis vestibulum."</p> <p>"Fusce dapibus, tellus ac cursus commodo, tortor mauris condimentum nibh, ut fermentum massa justo sit amet risus. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus."</p> <p>"Nullam id dolor id nibh ultricies vehicula ut id elit. Aenean eu leo quam. Pellentesque ornare sem lacinia quam venenatis vestibulum."</p> <p>"Sed posuere consectetur est at lobortis. Duis mollis, est non commodo luctus, nisi erat porttitor ligula, eget lacinia odio sem nec."</p>	<p>"Donec id elit non mi porta gravida at eget metus. Nullam id dolor id nibh ultricies vehicula ut id elit. Maecenas faucibus mollis interdum."</p> <p>"Aenean eu leo quam. Pellentesque ornare sem lacinia quam venenatis vestibulum."</p> <p>"Fusce dapibus, tellus ac cursus commodo, tortor mauris condimentum nibh, ut fermentum massa justo sit amet risus. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus."</p> <p>"Nullam id dolor id nibh ultricies vehicula ut id elit. Aenean eu leo quam. Pellentesque ornare sem lacinia quam venenatis vestibulum."</p> <p>"Sed posuere consectetur est at lobortis. Duis mollis, est non commodo luctus, nisi erat porttitor ligula, eget lacinia odio sem nec."</p>
Touchpoints	<ul style="list-style-type: none"> • Donec id elit non mi porta gravida at eget metus. • Aenean eu leo quam. • Nullam id dolor id nibh ultricies vehicula ut id elit. • Sed posuere consectetur est at lobortis. 	<ul style="list-style-type: none"> • Donec id elit non mi porta gravida at eget metus. • Aenean eu leo quam. • Nullam id dolor id nibh ultricies vehicula ut id elit. • Sed posuere consectetur est at lobortis. 	<ul style="list-style-type: none"> • Donec id elit non mi porta gravida at eget metus. • Aenean eu leo quam. • Nullam id dolor id nibh ultricies vehicula ut id elit. • Sed posuere consectetur est at lobortis.
Actions	<ul style="list-style-type: none"> • Donec id elit non mi porta gravida at eget metus. Nullam id dolor id nibh ultricies vehicula ut id elit. Maecenas faucibus mollis interdum. • Aenean eu leo quam. Pellentesque ornare sem lacinia quam venenatis vestibulum. • Fusce dapibus, tellus ac cursus commodo, tortor mauris condimentum nibh, ut fermentum massa justo sit amet risus. 	<ul style="list-style-type: none"> • Donec id elit non mi porta gravida at eget metus. Nullam id dolor id nibh ultricies vehicula ut id elit. Maecenas faucibus mollis interdum. • Aenean eu leo quam. Pellentesque ornare sem lacinia quam venenatis vestibulum. • Fusce dapibus, tellus ac cursus commodo, tortor mauris condimentum nibh, ut fermentum massa justo sit amet risus. 	<ul style="list-style-type: none"> • Donec id elit non mi porta gravida at eget metus. Nullam id dolor id nibh ultricies vehicula ut id elit. Maecenas faucibus mollis interdum. • Aenean eu leo quam. Pellentesque ornare sem lacinia quam venenatis vestibulum. • Fusce dapibus, tellus ac cursus commodo, tortor mauris condimentum nibh, ut fermentum massa justo sit amet risus.
Barriers	<ul style="list-style-type: none"> • Aenean eu leo quam. Pellentesque ornare sem lacinia quam venenatis vestibulum. Maecenas faucibus mollis interdum. Nullam id dolor id nibh ultricies vehicula ut id elit. • Fusce dapibus, tellus ac cursus commodo, tortor mauris condimentum nibh, ut fermentum massa justo sit amet risus. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus. 	<ul style="list-style-type: none"> • Aenean eu leo quam. Pellentesque ornare sem lacinia quam venenatis vestibulum. Maecenas faucibus mollis interdum. Nullam id dolor id nibh ultricies vehicula ut id elit. • Fusce dapibus, tellus ac cursus commodo, tortor mauris condimentum nibh, ut fermentum massa justo sit amet risus. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus. 	<ul style="list-style-type: none"> • Aenean eu leo quam. Pellentesque ornare sem lacinia quam venenatis vestibulum. Maecenas faucibus mollis interdum. Nullam id dolor id nibh ultricies vehicula ut id elit. • Fusce dapibus, tellus ac cursus commodo, tortor mauris condimentum nibh, ut fermentum massa justo sit amet risus. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus.

ClientLogo

Buyer Content Needs

BUYER CONTENT & MESSAGES

Product/Solution: Lorem Malesuada Etiam

Content Needs

Our Key Messages

EDUCATION			SOLUTION			VENDOR SELECTION		
Loosening of the Status Quo Committing to Change			Exploring Possible Solutions Committing to a Solution			Justifying the Decision Making the Selection		
TYPE	FORMAT	PURPOSE	TYPE	FORMAT	PURPOSE	TYPE	FORMAT	PURPOSE
1			1			1		
2			2			2		
3			3			3		
4			4			4		
5			5			5		
6			6			6		
7			7			7		
8			8			8		
9			9			9		
10			10			10		

Budget & Timing

Budgetary and Research Assumptions

- Estimated pricing is presented for two approaches:
 - Core personas only – Core Persona Information and Five Rings of Insight (pages 7-8)
 - Extended personas – Core Personas, Five Rights of Insight, Buyer Journey Map, and Buyer Content and Messages (pages 7-10)
 - Pricing as presented is to complete the entire project as one engagement, breaking into two stages over time would incur additional costs
- Our pricing assumes that we would be able to source 5 – 11 interview subjects through Afresh and would then supplement that with 8 – 16 sourced through a third-party research partner. We would coordinate with them and pass through those costs directly.
 - Pricing provided by 3rd party research partner is budgetary and would be influenced by total number of subjects required.
- We will broaden targeting to top 100-150 grocers to increase pool of interview subjects to ensure sufficient interview subjects.
- Afresh can provide existing research, interviews and current working personae as a starting point. The total amount of material and level of detail may influence scope as presented.

Pricing & Timing

PROJECT	SCOPE	PRICE	EXPENSES
PERSONAS (3) Core Personas	<ul style="list-style-type: none"> Project kick-off & persona hypothesis definition Desk research <ul style="list-style-type: none"> Review existing marketing & sales materials Competitive website messaging review 2 stakeholder interview, each 60 minutes in length Interview script development 21 interviews total (7 per persona), each 45-60 minutes in length, does not include previously conducted interviews 3 core personas developed and delivered as PDF documents as shown in this proposal – <u>pages 7-8</u> Assumes client will provide interview contacts that have committed to participating 	\$45,000	N/A
EXTENDED PERSONAS (3)	<ul style="list-style-type: none"> Project kick-off & persona hypothesis definition Desk research <ul style="list-style-type: none"> Review existing marketing & sales materials Competitive website messaging review Detailed assessment of existing Afresh messaging 2 stakeholder interview, each 60 minutes in length Interview script development 21 interviews total (7 per persona), 60 minutes in length, does not include previously conducted interviews 3 extended personas developed and delivered as PDF documents as shown in this proposal – <u>pages 7-10</u> Assumes client will provide interview contacts that have committed to participating 	\$56,000	



TIMING

Persona development takes approximately 8-10 weeks from kickoff to delivery
Detailed timelines will be developed and provided upon approval of the proposal

group

Pricing & Timing

PROJECT	SCOPE	PRICE	EXPENSES
3 rd Party Recruitment	<ul style="list-style-type: none">If necessary, additional costs may be explored for a 3rd party service to assist in recruiting interview subjects. The exact number and costs can be defined based on shortfalls in direct recruitment during initial stages.8 - 16 interviews – 60 minutes in length, sourced with relevant expertsVendor pricing is budgetary and a la carte.		\$13,330 – 26,560

Roadmap

Campaign & Media Planning

With a clarified understanding of your buyer needs and journey, you can develop need-based campaign creative and messaging to move a buyer through their journey. Support it by a paid, owned and earned media strategy.

Deliverables: Campaign & Media Plan, Need-based Campaign Creative

Full Persona Development

Craft full personas documents for prioritized personas that provide insight into your buyer's needs and desires as they evaluate packaging partners and solutions. Map their journey to inform content and messaging that persuade and drive demand.

Core Deliverable: Core Persona Info, 5 Rings of Insight, Buyer Journey Map

Expansions: Customer Journey Map; Messaging & Content Plan, Qualitative Media Study

Buying Group Summaries & Persona Prioritization

The intent of this phase is to collect stakeholder input to establish a baseline understanding of buyer roles & involvement to guide persona prioritization. These internal assumptions will be vetted in full persona development.

Deliverables:

- Map of 'Buying Group Roles' for new concept & established market
- Map of 'Buyer Involvement' for new concept & established market
- Prioritized personas list