

Branding Process & Persona Example

The Persuasive Process



Five Rings of Insight™



Persona Deliverables



IVAN IT

INDUSTRY:
Agriculture
Education
Health Care / Social Service
Government
Utilities / Communication
Construction / Manufacturing

FUNCTIONAL ROLE:
Informational Technology

BUSINESS SIZE:
50–300

BUYER TYPE:
Critical Influencer,
Specifier

ROLE IN DECISION-MAKING PROCESS:

“ I am the main point of contact for evaluating solutions. I’m likely to appreciate a no-nonsense approach that doesn’t involve my whole team’s time in the early stages of evaluation. In my decision-making process, I’m seeking out solutions that will expand our capabilities and create a better customer experience while integrating easily with our existing technology. My decision-making process is going to be focused on cost, efficiency and productivity, so I’ll need to understand how proposed solutions directly affect those areas. In some cases, I’m the final decision-maker, but at this point I’ll typically include and seek the feedback of my team — including the owner or others in leadership roles — to make sure the solution meets their needs in a practical way.”

Prepared by The McGraw Hill TheMcGroup.com

KEY TAKEAWAYS:

- I’m typically putting out fires and don’t have a lot of time to think about what’s next. If you can help me prevent the next disaster or save me time, I’ll listen.
- I want to do as much research myself as I can. I have a problem I want to solve, I’ll start Google search to find information that me. This might include blogs, articles, other content. I want to learn what I can and then work with a salesperson to fit answer my questions.

- Overall, I’m not big on social media, but it is important. Colleagues, peers and I are some of my most trusted advisors; sometimes look to LinkedIn to see what’s talking about. User groups are another network with others who might be going through some of the same challenges I have.

- I want to see how it works. I want to see Show me the interface, how the feature what the reports look like. I want to be able to use, what features might be and which are going to be challenging.

- Conferences are a great way to see what’s new, but my attendance depends on budget and how much time I have. I’ll need to understand how proposed solutions directly affect those areas. In some cases, I’m the final decision-maker, but at this point I’ll typically include and seek the feedback of my team — including the owner or others in leadership roles — to make sure the solution meets their needs in a practical way.”

- I’m equally likely to look for a solution I’ve been asked by the leadership team as I have discovered on my own.
- U.S. Cellular is known for good customer service. That’s important because it means fewer issues for me to deal with.
- If I’m in the education industry in particular, regularly challenged by budget, cost-benefit balance being cost-effective and providing service I can.
- I’ll lead the decision-making process, but I’ll get feedback from the people who the technology to make up my mind.

CORE PERSONA INFORMATION

POSSIBLE TITLES:
• IT Director
• IT Manager

PREFERRED CONTENT TYPES:
• I look at user reviews when evaluating solutions. If others don’t have a good experience, I don’t think I will either. Case studies from vendors are helpful, but I take them with a grain of salt because I recognize that



MARY MANAGER

INDUSTRY:
Waste Management
HVAC
Construction
Legal Services
Plumbing
Industrial Services

FUNCTIONAL ROLE:
Business Administration,
Business Owner,
Office Manager

BUSINESS SIZE:
20–50

BUYER TYPE:
Critical Influencer,
Specifier

ROLE IN DECISION-MAKING PROCESS:

“ I am very involved in the decision-making process. If I am the owner, I will make the decision. If I’m an administrator, I will need to get final approval from the boss, but they’ll usually go with what I say as long as it doesn’t cost too much. I’m focused on making sure that our business stays in business and we keep delivering the same service we’re known for in our community, and I’m not willing to risk that with a new technology I don’t understand. We consider ourselves a small business and we’re a close-knit team, so I may consult some of our team members if the solution will affect them, but ultimately, I run the show. We don’t have an IT person, so I’ll be the person managing the tool once it’s implemented.”

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KEY TAKEAWAYS:

- My job is to make sure our small business keeps running. I’m more apt to focus on keeping things the same rather than look to the next big thing. We don’t need technology to run our business; doing just fine without it.

- I wear a lot of different hats, so this is the only thing I’m worried one of a hundred.

- We’re a small business, but I do to be treated like a drop in the bucket responsive, and treat me like a valuable business partner.

- The best way to get me to think IoT solution is to show me that it’s worth it. If I can save money, the attention!

- I don’t know much about IoT or would be used in my business. It’s something that’s meant for big companies. You will have to educate me on and how it will help my business.

- You can teach me that there are to use technology, but to do that to understand my business.

- Technology is intimidating. I don’t IT person. Anything we put into have to be installed and managed. I don’t want anything complicated going to have to make sure work.

- Customer service is important to me. I want to know if I have someone to call any issues or questions. I don’t want unsupport.

- I’m going to be skeptical of what solution can do for my business. I’ll live up the talk, I won’t continue one chance to show me that this solution.

- I respect relationships. We’re a community, and if you are too, I will talk about.

CORE PERSONA INFORMATION

POSSIBLE TITLES:
• Director of Transit
• Director of Project Management

PREFERRED CONTENT TYPES:
• Case studies (peer proof) is big.
• Give me content I can read at my own pace.



OWEN OPERATIONS

INDUSTRY:
Education
Transportation
Waste Management
Construction
Health Care

FUNCTIONAL ROLE:
Operations

BUSINESS SIZE:
50–300

BUYER TYPE:
Critical Influencer,
Specifier

ROLE IN DECISION-MAKING PROCESS:

“ I’m responsible for our operations, in their entirety. If we require software, wireless equipment or anything that supports our processes and workflow, I’m the guy who gets it for us. That means I’m also responsible for how well it works, and its impact (positive or negative) on our productivity, efficiency and overall operational performance.

I wear a lot of hats and don’t have a lot of time for new initiatives. I’m open to change, but only if it’s low-risk. If I’m certain something will improve our efficiency and effectiveness, I’ll pursue it. If it has the potential to cause problems or inconvenience, I’m not interested — I just don’t have time to add more to my plate. If you want me to buy from you, don’t make me do a lot of work to understand the value. I’ll need to decide quickly and confidently, and I can’t do that if I don’t trust that you’ll provide maximum value with minimum disruption.

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KEY TAKEAWAYS:

- I wear a lot of different hats in the organization. You might say I’m a jack of all trades and a master of none. I’m regularly bouncing from one task and function to the next one. Wireless and other connected solutions are only one part of many things I’m responsible for.
- I’m interested in solutions that will improve efficiency and cost effectiveness for our business. It’s my responsibility to make sure everything runs like it should.
- My familiarity with and understanding of the concept of IoT varies. It’s more important to me to know there is something that could solve an issue of mine, than to know how the technology works.

- I’m not a technologist, and I find technology a bit overwhelming. I understand that it can help my business, but the fact that I’ll have to be responsible for it is daunting. I need you to help me feel comfortable with it, and confident that I can manage it solo once implementation is complete.

- Customer service and support is important to me. I want to feel supported in learning about the technology, and I want to feel like I have someone to go to with questions or concerns.

- Because my role is so broad, I’m more interested in information about my industry than information related to my specific role. I like to see how other businesses like mine are operating and how they’ve overcome challenges similar to the ones I face.

- In the education sector, fleet management is more complex than it used to be. There are many multi-home families, and we have to manage drop-offs of students at different family residences on different days of the week. That takes extra planning and communication.

- If I work for a government entity, I often have to comply with existing contracts. I don’t have as much freedom for new solutions as a private sector decision-maker might have. There are a lot of rules and regulations I have to abide by, and I expect vendors to understand that.

- I want proof of product success, either from peers or through trial periods before final purchase.
 - “From our point of view, I really believe a testing period would be the way to go. That’d be my number-one recommendation.”

CORE PERSONA INFORMATION

POSSIBLE TITLES:
• Director of Transportation (Education)
• Director of Transit
• Director of Project Management
• Purchasing Specialist
• Controller
• General Manager
• Corporate Secretary

PREFERRED CONTENT TYPES:

- Demos
- Case studies (peer proof) is big
- Give me content I can read at my own pace.

HOW DO YOU GET MY ATTENTION:

- Be quick. I’m busy and not willing to give you a lot of time.
- Provide references; you have to earn my trust upfront.
- Case studies; prove you understand my industry and have provided value to my peers.
- If you tell me I can save money, you’ve peaked my interest.

HOW DO YOU EARN A SALES VISIT:

- Be respectful of my time.
- Be respectful of my business challenges.
 - “When it came time for staff like that, [Eric] was very patient. He was very understanding. And that’s kind of what made him unique from some of the other people.”
- Start with a meal (rather than cold call or visit). That way I can react when I’m ready.

SOURCES OF INFLUENCE:

- I’m connected to industry organizations that provide great information when I’m evaluating a new solution or have a problem I’m grappling with. I read their newsletters and attend their events. The peers I meet in these groups are a great resource as well.
- I often go to colleagues with more specific roles for feedback or guidance. For example, I will consult the IT team with any questions or challenges I have related to technology. They are often one of my first stops to see if they have any recommendations when I have an initial need.

PREFERRED COMMUNICATION TACTICS:

- E-mail is the best way to connect with me, but I’m not likely to open it if it looks like spam. It has to feel like it’s relevant to me. If it’s related to my industry, even better!
- Phone is OK, too, but I want to make sure you have a reason to call. I want to hear that it’s relevant to me or I’ll be frustrated you wasted my time.