



The Mx Group

Persona Proposal

August 16, 2022

Your Need

- Develop a better understanding of the key roles involved in the purchase of Cvent's Hospitality Cloud offerings
- Need to identify and understand distinctions between different users based on role and level (At-Property, Above-Property)
- Want to understand how product users influence the purchase decision and how to message to them differently

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

Buyer Ecosystem Summary

BUYER GROUP SUMMARY

Market Maturity: New Concept New Paradigm Established Market

BUYING GROUP ROLES

ROLE	INITIATOR	SPONSOR	END-USER	INFLUENCER	BLOCKER	DECISION MAKER	BUDGET HOLDER
Persona A	☒		☒	☒			
Persona B		☒				☒	☒
Persona C			☒	☒			
Persona D				☒	☒		
Persona E				☒			

TYPICAL BUYER INVOLVEMENT

PHASE	EDUCATION	SOLUTION	SELECTION	INITIATION	ACTUALIZATION	EXPANSION
Persona A	██████████	███	███	███	███	███
Persona B	██	██████	██████	██████	██████	███
Persona C	██	███	███	███	███	███
Persona D	██	███	████	████	██	██
Persona E	██	███	███	███	███	███

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. ”

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- 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.

KEY TAKEAWAYS:

CORE PERSONA INFORMATION

POSSIBLE TITLES:

- Condimentum Sem
- Adipiscing Inceptos / Lorem Consectetur
- Pellentesque 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.
- 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 CHALLENGES:

- 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.

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.

PERSONA–PRODUCT CONNECTION



 FIVE RINGS OF INSIGHT™

Product/Solution: Lorem Malesuada Etiam

Market Maturity: New Concept New Paradigm Established Market

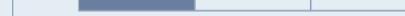
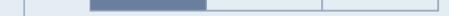
Buyer Persona
INSTITUTE
MARKETING PERSONIFIED

1. PRIORITY INITIATIVES	2. SUCCESS FACTORS	3. PERCEIVED BARRIERS	4. BUYING PROCESS	5. DECISION CRITERIA
<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. Etiam porta sem malesuada magna mollis euismod. Vestibulum id ligula porta felis euismod semper. Duis mollis, est non commodo luctus, nisi erat porttitor ligula, eget lacinia odio sem nec elit. Praesent commodo cursus magna, vel scelerisque nisl consectetur et. Vivamus sagittis lacus vel augue laoreet rutrum faucibus dolor auctor. Etiam porta sem malesuada magna mollis euismod. Aenean lacinia bibendum nulla sed consectetur. Curabitur blandit tempus porttitor. Nullam quis risus eget urna mollis ornare vel eu leo. Aenean eu leo quam. Pellentesque ornare sem lacinia quam venenatis vestibulum. Donec sed odio dui. Nullam quis risus eget urna mollis ornare vel eu leo. Etiam porta sem malesuada magna mollis euismod. 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Individual Buyer Persona

BUYER JOURNEY MAP

Product/Solution: Lorem Malesuada Etiam

	EDUCATION	SOLUTION	VENDOR SELECTION
Goal	Loosening of the Status Quo Committing to Change	Exploring Possible Solutions Committing to a Solution	Justifying the Decision Making the Selection
Involvement			
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

Budget & Timing

Budgetary Approach & Assumptions

- We recommend including a Buying Group Summary (page 7), which we believe will be very useful for you given the variety of roles involved as both users and buyers. At the outset of the project, we would conduct a workshop with your team to understand the roles and interrelationships of your buying group. This will both inform the persona creation process and result in the final Buying Group Map as shown above.
- Provisionally, we've estimated creating 5 personas (according to the template on pages 8-10) and the pricing is structured to reflect that. The amount of background, data and research provided up front would influence time and materials costs as would the number of interviews required. We typically recommend 7-10 interviews per role and believe that would be the right number for you. We would look to you to identify and warm interview subjects from among current customers and recent lost sales. From there, we would coordinate with you to make to schedule interviews and make the experience seamless for interview subjects.
- Our Five Rings of Insight page (page 9) highlights the product-persona connection. For this estimate, we assume that each persona, will require a single Five Rings of Insight page because each persona will typically evaluate either the entire solution or a single product.
- The pricing provided below is preliminary and final pricing will be developed in the final scope of work.

Pricing & Timing

PROJECT	SCOPE	PRICE	EXPENSES
BUYING GROUP SUMMARY	<ul style="list-style-type: none">Mx to lead a stakeholder workshop to define buying group roles and typical buyer involvement at start of persona process and will validate those assumptions during buyer interviews.Map over overall buying group as shown in this proposal.	\$7,500	N/A
PERSONAS (5)	<ul style="list-style-type: none">Project kick-off & persona hypothesis definitionDesk research<ul style="list-style-type: none">Review existing marketing & sales materialsCompetitive website messaging review2 stakeholder interviews, each 120 minutes in lengthInterview script development35-50 interviews total (7-10 per persona), each 45-60 minutes in length5 core personas developed and delivered as PDF documents as shown in this proposal – pages 8-10 aboveAssumes client will provide interview contacts that have committed to participating; Mx can provide an estimate for recruiting support if needed	\$75,000-\$100,000	N/A
TIMING	Persona development takes approximately 8-12 weeks from kickoff to delivery Detailed timelines will be developed and provided upon approval of the proposal		

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