



B2C & B2B Buyer Persona Assessments

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Top 50 Marketing & Sales Influencer 2011 – 2015

Woman to Watch in B2B Marketing – FierceCMO '14

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and *Digital Relevance*



Obsessed about helping B2B companies use eMarketing strategies & contagious content platforms to turn prospects into buyers and convince customers to stay.

Believes buyer personas are the key foundational tool for every content marketing strategy.

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Clients Include:



Introductions

Your Name:

Where you work

Your experience with personas

Agenda

- 2:15 – 2:45 Personas & What They Inform
- 2:45 – 3:00 Examples of Pivots for Personas
- 3:00 – 3:30 How to Assess a Persona
- 3:30 – 3:45 Break
- 3:45 – 4:45 Persona Assessments
- 4:45 – 5:00 Q&A and Final Thoughts



A persona is a composite sketch of a target market based on validated commonalities that actively informs content strategy to drive productive engagement.

Commonalities Trump Unique Attributes





9 Components

1. A Day in the Life
2. Objectives
3. Problems
4. Orientation
5. Obstacles
6. Questions
7. Preferences
8. Keywords & Phrases
9. Engagement Scenarios



1st-Person Scenarios

“A Day in the Life”

NO:

Diane is a hard worker who is determined to make product launches more efficient.

YES:

I’m struggling to get products to market faster because our processes are too convoluted but my boss is worried that changing them will create more chaos.

Objectives, Goals, Responsibilities

NO:

Grow Revenues

YES:

Eliminate inefficiency to
speed time to market





Problems

NO:

Inefficiency

YES:

Lack of automated workflows adds months to product launches

Orientation

NO:

Married with
2 kids + dog

YES:

20 year career
Confident leader
Mentors his team





Obstacles

NO:

Price

YES:

What do I need to know to convince Tom?

What if our people won't adopt the new workflows?

Questions: From Status Quo to Choice

NO:

What features does your product have?

YES:

Given my situation, why should I care?

How do I eliminate X to achieve Y?

What can I do now that I couldn't do before?

Preferences



A close-up photograph of a hand in a dark suit jacket pointing its index finger towards a search bar. The search bar is a horizontal rectangle with a white left half and a dark grey right half. The word "Search" is written in white on the dark grey part, followed by a magnifying glass icon.

Search

NO:

Product-related words

YES:

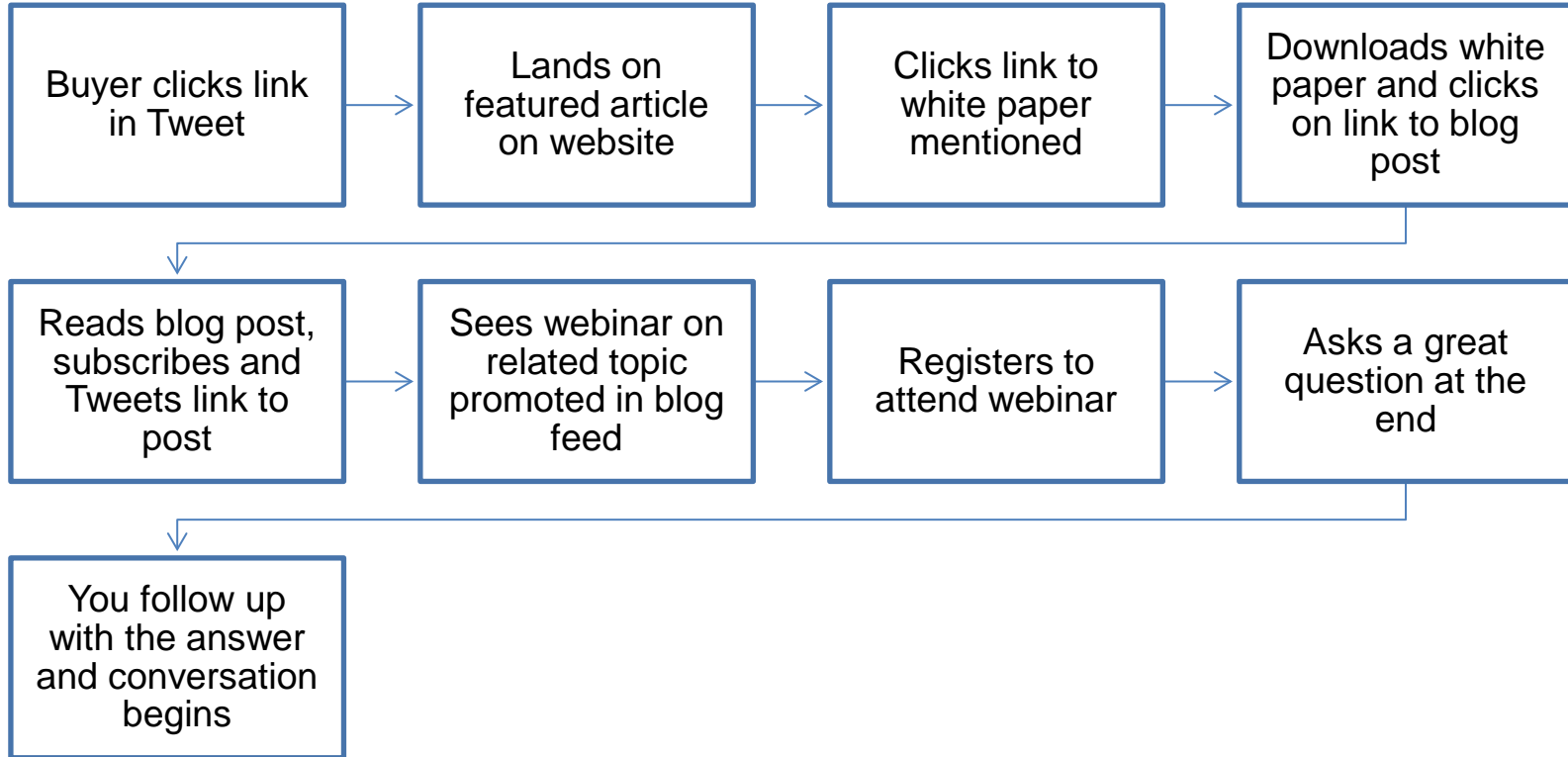
Reduce time to market

Product launch best practices

Engagement Scenario as Story



Engagement Scenario as Execution



Personas done well...

- Actively inform content strategy
- Increase relevance by matching value to context
- Make buyers the hero of the story
- Help drive buyer outreach
- Provide a relationship-building framework
- Create alignment with sales teams and the company

EXAMPLES OF PERSONA PIVOTS



Owner/Exec

“I need better information in real-time to make better decisions.”

About Owner/Exec

Has a lengthy career in construction and is now running his own business.

- Male
- Age 45 – 65
- Conservative
- Expert on construction industry
- Not tech savvy, but competent

Issues

- More competition, fewer jobs, tighter margins
- Costs are rising, especially health insurance
- Must do more with less
 - Make every employee efficient / accountable
 - Eliminate waste
 - Prevent accidents
 - Automate where it makes sense
- Trying to keep up with regulatory changes
- Need to please customers keep employees happy

Owner's Questions

- How can your software help my business?
- How much is it going to cost me? Any hidden costs?
- How long will it take to implement?
- How risky is it? What are our odds of success? Is there a guarantee?
- How quickly will this investment payoff?
- What could go wrong?
- Why should we buy from you?
- Do I really need all of this software?
- Who else has done this and what was their experience?

Our Answers

- Our software will help you work smarter and do more with less
- Our suite will provide you the information you need in real time so you can make better decisions
- We'll give you an accurate quote for the right amount of software, clear SOW with no surprises
- We have a [proven process] with over 500 successful implementations, backed by a 12 month money back guarantee.
- Estimate your ROI and payoff times using our [calculator]
- Here are things that can go wrong and how we address those in our [proven process]
- 27 years in business, 40,000 end-users, world-class customer support, continued innovation using customer feedback
- Most customers continue to expand their software suite. We can help you implement at your desired speed with pilots.
- Here is a complete list of customers in your area



Owner Owen

Decision Maker/Buyer

HeavyBid

HeavyJob

Equipment360

Safety

GPS

"I need better information in real-time to make better decisions."

Personal Insights

Age Group

41-50

Highest Education Level

Professional Degree

Main Area of Study

Engineering

Business Administration

Annual Income Range

\$90,000 to \$109,999

Location (Country)

United States

Canada

Orientation

Detail oriented and logical.

Technologies Used in Personal Life

Laptop

Smart Phone

Tablet PC

Preferred Content Types

Whitepaper

Video

Infographic

In-person presentation

Priorities & Drivers

Primary Professional Responsibility

Getting employees to think about safety and follow safe work practices, getting foremen and supervisors to understand the importance of safety, reduce costs (insurance, accidents, fines), plan safety program, keep up with changing regulations.

Secondary Professional Responsibility

Conduct safety orientations for new employees and sub-contractors, handle onsite first-aid cases, monitor job sites for safety hazards, maintain safety records and proper training documentation, enforce safety guidelines from company (OSHA, State, Clients), working with unions to educate their workers.

Top Pressure or Challenge

Developing trust in the employees to embrace a safety culture. Many employees think "I am not going to report any hazards because the foreman will blame me for slowing down work and then I'll get fired."

Secondary Pressure or Challenge

Keeping up with the constantly changing federal and state regulations. One new regulation has a domino effect on all that we do.

Other Pressures or Challenges

One major accident can have serious implications for the company. Owners are starting to demand a strong safety culture and record to allow you to bid on work. Safety personnel are responsible for employees and all subs on most of their jobs.

MEET JASON – An Electrical Engineer



PROFILE

- Jason, 38, is an electrical engineer for a construction engineering firm in Raleigh, North Carolina.
- He is married and lives with his wife and two kids in an historic home in Oakwood, an upscale suburb of Raleigh.
- Jason loves numbers and enjoys organizing and testing detailed projects to ensure everything goes as planned.

LIGHTING INTERESTS AND NEEDS

- Jason needs to be able to review detailed specifications on all lighting equipment and components to be able to perform the necessary calculations. He also needs access to detailed installation instructions in order to successfully oversee the work.
- He needs access to schematics, circuit diagrams and safety information.
- Jason also needs easy access to state and local building codes to ensure his projects are code compliant.

MY STORY

My name is Jason and I'm an electrical engineer with a specialty in commercial lighting systems. I've always been good at math — in college I breezed through calculus and physics and set my sights on electrical engineering.

Today, I work for an engineering firm that specializes in industrial and commercial construction projects. When it comes to the electrical and lighting plans, the buck stops with me. I'm responsible for making sure that all of the systems, equipment and components specified for a job will work. That means I'm responsible for double-checking all of the electrical and lighting components specified for a job to make sure they'll deliver the required illumination and light quality. I'm also responsible for overseeing installation, testing and making sure that all of the work is code compliant. It's a huge responsibility, but I enjoy the challenge of breaking a project down and running all the necessary calculations to make sure things will run smoothly. At the end of the day, I make sure that all the "i's" are dotted and "t's" are crossed before we call for inspections. I'm good at what I do and I take a lot of pride in my work.

DIGITAL TOUCHPOINTS

- Jason relies on digital communication tools to stay in touch with work crews, architects, lighting designers and electrical inspectors. He relies on his smartphone to make a quick call or send a text.
- Jason uses his tablet as a reference tool and to run calculations. He likes the convenience of using it to take periodic photos to document work progress.
- Social media provides Jason with a way to network with his peers, often relying on them for product tips and recommendations. He also uses social to stay in touch with his IEEE Knowledge Group.



Jason, Specifying Engineer for Commercial Office

I work for a consulting engineering firm and am responsible for specifying lighting solutions, mainly for new commercial office construction projects. The growth in LED acceptance has resulted in my specifying LED lighting as about half of the lighting load in roughly 55% of my firm's projects this year. Automatic lighting controls were also specified in about 75% of those projects. Whether the lighting solutions will be dimmed manually, automatically or switch automatically is determined by the job and needs of the spaces we're lighting. What I do see is that LED lighting is the best option today for pairing with lighting controls for both energy management and visual needs.

For the most part, the performance of LEDs is very good, the technical support from manufacturers is mostly okay, but boy could the commissioning be made easier. When a problem occurs, sometimes it's not so easy to identify the non-functional component, and—more often than I'd like—there are programming challenges to unravel. It would be easier if I didn't have to reach out so often for manufacturing support. But it's also why the support available is a key consideration when specifying lighting solutions.

I'm still specifying hardwired controls on most of our projects. Wireless is gaining traction but I'm still worried about introducing new problems and complexity that may be more difficult to manage—and building owners are a bit leery of security given the increase in cyber attacks being publicized.

While some of my peers are showing a preference for luminaires with the controls and sensors integrated within them, I'm still holding out for separate controllers and sensors—I know more what to expect from them. Dimming is still the big thing, although monitoring energy use and occupancy are gaining in attention with larger building owners. This said, it's still rare that we'll integrate a lighting solution with a building management system. I see more concern about scalability for lighting in case future needs change.

Staying abreast of new developments in LEDs and controls is getting easier with the internet. But when I go looking for information, it better be available at a click and it better be quantified. I don't have time or patience for vendors pushing products with vague claims. I still rely heavily on trade publications—they seem more unbiased than vendors.

Orientation:

- 56% are over age 51 (25% over age 60)
- 52% have 20+ years in the industry
- Creature of habit – slow to convert to new products – can take up to a year to trust a new vendor
- 70% of work output is specs
- Goes to agents for support / help
- Interfaces with lighting designers, contractors
- Precision is important (left brained, analytical)
- Likes to feel comfortable with vendor specified
- Proficient with CAD, Visio software
- Doesn't care about social media, commercial messaging

Objectives:

- Find cost effective, efficient lighting solutions of high quality with solid warranty and manufacturer reputation, support
- Specify the right control system
- Meet code / compliance requirements
- Meet light quality (luminance) specified for spaces
- Find easier ways to spec projects
- Stay abreast of developments in lighting / controls
- Streamline billable hours
- Implementing controls that the end users can self-manage so they won't be overridden, diminishing their value

Problems / Obstacles:

- Complexity of commissioning
- Getting overridden by contractor (value engineering)
- Keeping up with code changes
- Differentiating between lighting solution options
- Knowing how much to future proof a project
- Specifying a fixture no longer available when ordered
- Components not working well together when installed
- Inadequate budgets for quality designs
- Interoperability and lighting controls sequencing

What Jason Needs:

- Detailed product information – a lot of it – performance data, metrics and qualified numbers
- Websites with specification information, data sheets, modeling tools, selection guides
- Relies on trade publications for information
- Wants substantiated information from vendors, not commercial (marketing) messaging

HOW TO ASSESS A BUYER PERSONA

Strengths indicate that your buyer persona has the basics it needs to inform an effective content marketing strategy across the continuum of the buying process.

Weaknesses identify areas of improvement to help you capitalize on the Strengths and Opportunities provided by your buyer personas.



Opportunities are indicative of advanced techniques that can be applied to enhance the strengths of your buyer personas..

Threats are warning signs that indicate actions to take to get the value the construct of buyer personas promises—when they're developed as an actionable tool.

Scoring Persona Effectiveness



Consider the following during your assessment:

- Is the information represented by this element in our personas?
- Is it of a level of depth that makes it useful?
- Does this element help us to understand our audience?
- Are we using this element to influence the design of our content and interactions and the experiences we create?

Strengths

Rank the following statements with a score of 1 (not true), 3 (could be better), 5 (well done)



B2B Buyer Persona Strengths	1	3	5
Includes a narrative that helps us step into the persona's issues and situation			
Maps questions, needs and drivers at each stage of the buying process			
Identifies obstacles that could impede buying at each stage of the buying process			
Portrays the persona's relationships and influence on the buying committee			
Identifies channel and content topic and format preferences			
Subtotal for each column			
Total score			



Weaknesses

Rank the following Weakness statements with a score of 1 (agree), 3 (somewhat agree), 5 (disagree)



B2B Buyer Persona Weaknesses	1	3	5
Includes demographic/lifestyle info that is ineffective at informing content design			
Objectives, problems and needs are too high level to point to specific application			
Leans more heavily toward title than role			
Doesn't address the persona's status quo or current situation			
Has a number of similarities to other buyer personas you've built – not unique			
Subtotal for each column			
Total score			



Opportunities

Rank the following Opportunity statements with a score of 1 (not doing), 3 (sort of doing), 5 (am doing)



B2B Buyer Persona Opportunities	1	3	5
Identifies ways to help the persona resolve conflicts with others to move forward			
Points to tone and style that will improve content resonance			
Helps you shift context with content as persona progresses through buying stages			
Enables you to create consistency of experience in execution across channels			
Informs the development of a content strategy across the entire buying process			
Subtotal for each column			
Total score			

Threats

Rank the following Threat statements with a score of 1 (agree), 3 (somewhat agree), 5 (disagree)




B2B Buyer Persona Threats	1	3	5
We haven't been successful socializing buyer personas across the organization			
We didn't use external research or customer interviews to create our personas			
We don't use buyer personas in our company beyond our marketing team			
We haven't updated our personas in more than one year			
Different functions have created their own personas independent of ours			
Subtotal for each column			
Total score			

Time for a Break



PERSONA ASSESSMENTS

	Technical Decision Maker: The Transformational Leader
	<ul style="list-style-type: none"> • CIO • Technical decision maker • Develops IT strategy and roadmap • Leads technology team that evaluates technology options
Key Attributes	40-55 years old; Masters in Science, Executive MBA; at least 15 years experience in enterprise leadership roles
Attitude	Leader, business savvy, frugal, skeptical of vendor claims
Reputation	Visionary, decisive, well regarded within industry, egotistical
Job Focus	Creating enterprise-wide change, shifting perception of technology from utilitarian to strategic
Pain Points	<ul style="list-style-type: none"> • Identifying most promising technology • Getting company-wide buy-in for new software initiatives • Finding ways to make measurable impact
Keywords Used to Search for Information	enterprise software ROI, strategic software investments, breaking down departmental silos, increasing enterprise-wide productivity
Values	<ul style="list-style-type: none"> • Leadership: Ability to see and convey the "big picture" • Knowledge and expertise: Broad IT knowledge but not interested in technical details • Innovation: Follows latest trends; seeks proof of how others have applied new technologies • Expectations: High expectations of IT team and vendors/solutions to make strategic roadmap a reality
Fears	Making bad purchase decision, tarnishing reputation
Pet Peeves	Self-serving vendors who don't do their homework to understand his focus; vendors who disappear after implementation
Internal influences	Board of directors, CEO, CFO
Motivators	Bonus structure, ego, industry recognition
Information Sources	Peers; online search; Gartner, Forrester; Gartner CIO Leadership Forum; CIO Magazine; Fast Company magazine
Content Preferences	In-depth white papers, podcasts



Mid-Market/Enterprise

Primary Tasks:

Evaluate
Contact Hotline to Complete
Purchase

Type:

Trail Blazer
Pragmatist

Desired Business Outcome:

Sign up
Purchase
Use product

Allan Baker is researching enterprise-wide video conferencing solutions. He leads IT for a mid-size investment company whose brand is based on personal relationships and integrity.

Allan's COO wants to offer busy clients an alternative to in-person meetings. He also sees potential for maintaining the company's customer-centric culture through town halls and scalable trainings. Allan has a Cisco rep, but he starts at WebEx.com to do reconnaissance.

Careabouts:

Key Purchase Criteria:

Initial investment, potential opex savings

Biggest Frustration with Existing Technologies:

Too expensive
Integration issues

Barriers Preventing Further Investment:

Initial investment costs
Security



Judy Turnspeed started her medical company five years ago. She manages a team of 12 nurses along with a network of partnering clinics along the East Coast. With growing interest from investors, she's hoping to ramp up her business and expand without exhausting her travel budget.

She's looking at productivity tools to keep her team and partners connected, and solutions that make it easier to manage remotely. She's conservative about operational investments so she trials before buying.

Small and Medium Business (SMB)

Primary Tasks:

Log in
Host a meeting
Join a meeting

Type:

Early Adopter
Trail Blazer

Desired Business Outcome:

Sign up
Use product

Careabouts:

Key Purchase Criteria:

Initial investment, potential opex cost savings
Budget conscious
Needs to understand business value before purchasing

Biggest Frustration with Existing Technologies:

Too expensive
Integration issues

Barriers Preventing Further Investment:

Initial investment costs
Security

DEMOGRAPHIC information:

- Age 46
- \$103,000 annual salary
- BSN from UC Davis
- MHA from Walden University (online degree)
- Married, two kids
- Worked in a large hospital system in CA after nursing school

THE PROBLEMS she has that IHI solves:

- "I need to balance cost cutting with maintaining quality and it's very complex."
- "Getting adoption of best practices is slow and not uniform."
- "I would love to be seen as more of a 'go-to' leader within the larger organization."

ONE DAY in the life:

- Attends lots of face-to-face meetings
- Conducts office hours in ICU to give nurses and physicians time with her during the week.
- Handles a significant amount of paperwork related to regulation and compliance
- Has to be "on call" for scheduling and staffing issues at any hour of the day

Her **VALUES AND GOALS**:

- Son is a junior in high school and her daughter will be a freshman next year; family prioritizing their finances to pay for college
- Prides herself on staying on top of emails and being responsive to all levels of her organization and team
- Strong advocate for work-life balance in the office but often works several hours in the evening except for Friday and Saturday
- Attends church regularly
- Encourages her staff to grow professionally



Her main **INFO SOURCES** and **WATERING HOLES**:

- SCCM enewsletter
- ICU Director magazine
- Office hours in departments
- Hospital cafeteria
- After work socialization with department staff on a monthly basis
- Informal chats with former colleagues in CA hospital system
- IHI Quality Innovators LinkedIn group. Hasn't posted yet; looks through ICU-relevant posts.
- Member of AACN

THE EXPERIENCE SHE WANTS when seeking out IHI products or services:

- Wants to be able to read comments and feedback on the IHI programs in the way that she reads Yelp reviews of restaurants
- Would like to conduct a "chat" when she is deciding whether or not to sign up for a program
- Wants to be recognized as a "fan" of IHI even if her attendance level is not what we consider high. She was an enthusiastic OS participant when she got her MHA in 2009.

Diane Director, BSN, MHA
Director of Critical Care at
Terre Haute Regional Hospital in Terre Haute, IN

Their **ROLE AND LEVEL SENIORITY** in detail:

- Reports to VP of Patient Care Services.
- Administrative responsibilities for a 32 bed ICU unit, 35 bed CVICU unit, and 4 cardiac inpatient units.
- Has budgeting power for 300 FTE staff ICU

Her most **COMMON OBJECTIONS** to IHI's products or services:

- Needs cost cutting guidance; doesn't know if Bedside to Balance Sheet is for her
- Wants more content on culture change that could enhance process improvements
- Needs more material on how to get senior leadership behind her efforts; mobility in the ICU was treated as an experiment in the eyes of the VP of Patient Care, not a way forward.
- RNs only get \$500 a year in pro. development funds for non-degree programs; puts IHI content out of reach for her staff.

IHI Areas of Focus that she would be interested in: Quality, Cost, Value / Patient Safety

IHI Rings she would engage in (by %): Innovate (5%), Demonstrate Results (15%), **Build Capability (75%)**, Disseminate Knowledge (5%)

IHI programs she has attended/resources used: OS courses, Rethinking Critical Care seminar, Survey Design W+A, WIHI broadcasts on ICU subject matter

Customer persona

Liam, CEO Large Enterprise (>1000)



CEO, Optus

Age: 53

HHI: \$415K

Education: MBA,
Australian National U.

Location: Sydney, NSW

Liam's Story

"I will be the one to lead my company into the future."

As a CEO of a leading telecommunication's company, I have to remain focused one step ahead of change. I am always on-the-go, and my assistant is responsible for making sure my email and appointments are always up-to-date in my mobile as I go from one meeting to the next. I need to keep our investors and Board of Directors satisfied in the tumultuous global financial market by meeting (or exceeding) revenue goals and keeping operating costs at a minimum. I aim to ensure that our company grows, by implementing the necessary ad hoc changes to drive our industry forward.

INFORMATION NEEDS^{1,2}

- Business-related thought-leadership that keeps him up to date on the latest industry trends and marketplace
- Networking opportunities and peer insights
- Case studies of proven business strategy
- Broader knowledge of how multiple arenas (e.g., politics, stocks, local news) affect his company

COMMUNICATION CHALLENGES^{1,2}

- May be too busy for content that requires time commitment, (e.g. video or social networks)
- Might avoid communication deemed overly technical
- May leave IT decision making to CIO
- May be influenced by prior vendor relationships or experiences

FAVORITE BOOKMARKS (WEBSITES)^{3,4}

- Vendor Websites⁴
- TheAge.com.au
- NineMSN News
- Commbank.com.au
- AFR.com
- Google.com.au¹
- Economist.com
- YouTube
- Smh.com.au
- Qantas.com.au¹
- Bloomberg.com
- ANZ.com
- Asx.com.au
- CNN.com
- LinkedIn⁵
- BigPond Email

DIGITAL CHANNEL USAGE⁶



Sources:

¹RoyMorgan08: Chairman/Managing Director/Head; \$150k+

²The Enterprise of the future. IBM Global CEO study. IBM Study 2008. Making change happen

³ABR S2009: Chairman/Chief Executive

⁴CBS Interactive: C-Suite & IT Pro Media Usage, Aug. 2009

⁵IBM Growth Markets Unit: The Curious Web; Q209

⁶RoyMorgan08: Men; 40-59; Chairman/MD/Owner; Internet at Work



Marketing Molly

Gender: Male or female, skewed female

Age: 30-45

Education: College grad

"I'm overwhelmed keeping up with the demands of my boss and the sales team, and I'm already busy managing the existing vendor relationships that I currently have in place."

Job Title & Seniority

- CMO, Director, Coordinator
- Reports to boss (business owner, CEO, President, etc.)
- Usually works with a limited budget

Goals

- Be on time and on budget
- Make impact, demonstrate healthy marketing ROI for boss
- Please sales team; impress boss

Common Objections

- "Our budget is already exhausted"
- "We've been burned badly in the past by vendors"
- "I can't manage yet another relationship right now"

Involved In

- Marketing webinars
- Learning new software
- Learning better ways to leverage social media for business
- Family, kids, friends etc.

Challenges & Pain Points

- No accurate way to report ROI
- Short on leads and having a hard time finding the right ones
- Under pressure; trying to keep up with demand of boss / sales team

Experience He Wants

- Wants to be spoken to at their level; doesn't like tech-talk
- Wants to know that we're making it easy for her to do her job, drive results, and look great for boss
- Want to know that we can demonstrate a healthy ROI

Average Day

- Manage all marketing efforts – online and offline
- Come up with new campaigns while managing existing ones
- Reporting on marketing efforts
- Getting caught up in noise

Values

- Results
- Convenience of working together
- Peace of mind
- Prompt, clear communication

Info Sources

- Competitor websites
- Facebook and Twitter
- LinkedIn news feed/top stories
- Mashable and other social media websites
- Friends & family

Thank You!

Questions or
Comments