



Buyer Personas – How to Create and Use them to Grow Your Business



White Paper

Why and How Buyer Personas Will
Help Grow Your B2B Business

Executive Summary



Often B2B sales are lost or missed through simple perception gaps: misunderstood needs, mismatched priorities, failures of communication, ... If only your salesmen could read their buyers' minds? The technology isn't there yet but the next best thing is a Buyer Persona. This white paper presents an up-to-date overview of the "dos" and "don'ts" of creating and using Personas to grow your business, better understand your existing customers and apply a laser-like focus on finding and satisfying new customers.



1. INTRODUCTION AND HISTORY

Successful businesses have always understood their customers' needs, studied them, monitored changes and continuously adapted their products, services, sales and marketing strategies to suit.

Using 'Personas' is simply the latest approach to achieving this same objective, although in a more refined and typically more comprehensive way than previous approaches. As an online search will quickly show, the technique has been in use (and iteratively improved by many practitioners) for about 15 years. However to think of it as similar to previous techniques (such as what used to be called 'customer profiling' or 'customer segmentation') is a mistake that can lead managers to misunderstandings and therefore wasteful or less than optimal implementations. We'll highlight the differences and hence the advantages as we proceed through this white paper.

Of course there are usually many 'personas' involved in most customer transactions – the 'buyer' may be just one of many (various users and influencers may be some of the others) but the key buying decision maker is the one to start with. Everything you learn in this white paper is likely to be applicable to other personas (for example user personas to enable better design of your products user experience (UX)) that you may want to research, create and use in the future but we recommend starting with **Buyer Personas**.

The origin of term 'Buyer Persona' has been attributed to Alan Cooper (of the Cooper Interaction Design firm, now called Cooper) as the founding father of personas and their use for the interaction design of digital products. His 1999 book, "The Inmates Are Running the Asylum", provocatively reviews how user unfriendly products were typically produced by software programmers and engineers and describes the use of personas to design user friendly products instead. In the nearly 15 years since many individuals working separately or with Alan have refined and improved the idea – we'd like to recognize people like Tony Zambito (CEO Goal Centric), his colleague Angela Quail, Adele Revella (President of the Buyer Persona Institute), consultancy groups such as Forrester and marketing companies such as Hubspot. We recognize and are indebted to these individuals and organizations and many others not named here for the development, improvement and knowledge they have created and shared.

Like most adopted ideas, Buyer Personas have evolved through successful use. Everything from the definition to how to research and create them to how to use them has changed and will likely continue to be refined over time. However many companies have now had proven success with them and there's a depth of experience on mistakes too - this white paper outlines best practice today and illustrates it with a recent case study.

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Case Study – Autodesk

About Business Advantage

"Past behaviour is the best predictor of future behaviour"

An old adage

2. WHAT IS A BUYER PERSONA?



"Business Advantage has provided us with the answers to some vital questions. For our customers, we now have a much better understanding of where and why they purchase, and how open are they to changing these patterns. For our channel partners, we have a greater understanding of their margin expectations, and their sales empowerment needs."

World Wide Media
Marketing Manager, HP

The original definition established in 2002 was, "Buyer Personas are research-based archetypal (modeled) representations of who buyers are, what they are trying to accomplish, what goals drive their behaviour, how they think, how they buy, and why they make buying decisions." Today, the Buyer Persona Institute includes "where they buy" as well as "when buyers decide to buy." Others have their own definitions, for example, Hubspot's definition is, "Semi-fictional representations of your ideal customer based on real data and some select educated speculation about customer demographics, behaviour patterns, motivations, and goals."

Buyer Personas ARE NOT specific real people, job titles, job positions, target markets or industry segments. Some people have criticised the approach for being 'descriptions of fictional characters' or 'imaginary people' and therefore not relevant. But don't be misled – just as a spreadsheet can model and help you understand your business, so a Buyer Persona can model your customers and help you understand their behaviours.

Buyer Personas are very different from approaches they replace such as 'customer profiling' and 'industry segmentation' that you've likely used in the past. Customer profiles break your potential target customers into groups based on company size, job title and industry or some other criteria. Personas go further to cover behaviours, often presented as personified characters, sometimes with pictures to make them easier to visualize and empathize with.

Where customer profiles are commonly obtained by quantitative market research, Buyer Personas require qualitative research to obtain insights, possibly quantitative research too, and skilled analysis to connect the dots between them. For example, two 40 year old software company CIOs in the same industry might fit the same customer profile but have different motivations and decision making styles, so fit different Buyer Personas. However, as we'll discuss later, one common mistake is having too many Buyer Personas. Often the same buying behaviour, motivations and decision making regarding your product may occur across multiple markets and industries so a single Buyer Persona may suffice.

Buyer Personas ARE deeply qualitatively researched descriptions of real buyers who influence or make decisions on the products, services or solutions you market. They present behaviours, real insights and understanding of about how, when and why your buyers make the decisions you want to influence – their goals, motivations, mindset, common behaviour patterns, professional and personal pain points, language, demographic and biographic information.

They are a tool to enable you to know your buyer as you know a character in a good novel so that your strategies and tactics better persuade buyers to choose your company rather than a competitor (or the status quo).



"Business Advantage had the international research capabilities required for this project which covered APAC, US and Europe and Business Advantage had a very good understanding of the problems in these markets. We had a very good relationship, Business Advantage know their business."

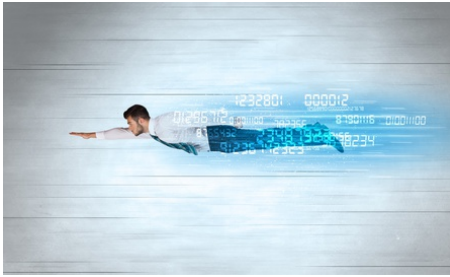
**Global Launch Manager,
Autodesk**

3. WHO SHOULD USE THEM?

Buyer Personas should be used by everyone who needs to become an expert on buyers to do their job, for example every marketer developing strategy, tactics or content and every sales person (up to and including the CEO). Buyer Personas should inform and guide decisions on marketing and sales strategies and tactics.

The resulting improved marketing and sales should lead to more revenue or more customers or both. Further benefits relate to efficiency and cost reductions resulting from common focus, understanding and alignment across all departments of the company; not just across sales and marketing departments but every department, from product management to product development, from services to technical support, from website development to executive management. Here are a few examples.

- Your sales people may be trained to emphasize your solution's impact on cost reduction, but an insightful Buyer Persona would identify the cost category and degree of cost reduction that buyers should anticipate through use of your solution.
- A buyer may want a solution that is "easy-to-use." An insightful Buyer Persona would specify exactly which aspects of the solution this persona expects to be "easy to use" and how they determine in the buying process which solution is the easiest to use.
- A website development department might be asked to produce and manage an appealing website that converts visitors to prospects to buyers. Understanding prospective customer mindset is obviously critical when developing site navigation and writing the page copy (and incidentally customer mindset is not typically part of a customer profile but is a key part of a Buyer Persona). Many website development teams mistakenly structure their website navigation and copy from an internal to the company perspective (such as the departmental structure of the company) rather than the potential customers' perspective. That approach may even work for existing customers (who already know the company and product range well) but may well confuse prospective customers who'll simply click or tap away to another site. A likely indicator that this has happened is an emphasis on features rather than benefits of products - the website (especially the home page) may brag about the company and features of its products but not address the customer's issues in the way they think about them.
- A technical support department of a software company might express a new product benefit as "automatically installs software updates." This sounds fine but researching the Buyer Persona might reveal the insight that customers have in the past lost many days of productivity due to known software bugs.



“... the thing that could not be taught, and only to a small extent trained, was speed. So adidas adapted one of its track shoes into an exceptionally light football boot... it became an instant hit.”

Economist Article

Perhaps those known bugs have already been fixed by the software supplier but not yet installed in the customer's version. The customer's mindset on the problem is the delay between fixing the bug and their access to the fixed version. The benefit might be better presented as, "Cloud version - customers always automatically use the latest updated version." The point is awareness of the customer's mindset so that product benefits, the navigation to them and the copy explaining them address customer's current problem in their terms.

- “Ten years ago sportswear makers were cramming ever more features and futuristic designs into their products ... convinced that the consumer bought, say, training shoes based on their technical specification” (ref The Economist, ‘The adidas Method’ Aug 24, 2013). “Spending weeks with... divisions of Bayern Munich Football Club, ... researchers asked not how long the studs on their boots should be, but what would determine the success of a footballer... the thing that could not be taught, and only to a small extent trained, was speed. So adidas adapted one of its track shoes into an exceptionally light football boot... it became an instant hit.”
- A leading CAD vendor identified a new opportunity to use technology in the CAM market. From a user experience perspective CAM has not significantly changed in more than 20 years and many machinists continue to hand program machine tools. There was a need to become intimately familiar with machinists, CAM engineers and Managers to understand how to enable and encourage them to change from hand programming to the proposed new solution. A major focus was to understand the behaviours of the end users, such as their use of technology at work and at home, their activities on a day to day basis and their sources of frustration. Online focus groups followed by 280 interviews with CAM engineers, Machinists and Managers in the USA, Germany, UK and Italy to gain insights and prepare personas of CAM users.

General Manager Persona

Business Advantage
intelligence. insight. innovation.



Synopsis

- Primarily involved in sales, organising jobs and discussing strategy

- Average age 50 - 55, working in manufacturing industry for 20+ years
- Technical training from CAD/CAM certificate programs
- About 20% have an Associate Degree or Bachelors degree, 15% have not achieved more than High School education

- Finds out about new technology via magazines and websites
- Typically using a desktop computer at work, and many have a Smartphone at home
- More likely to have a desktop and laptop at home
- Half will be a member of a professional network
- Lacks knowledge about social media

- Frustrated by complexity of CAM programming
- Concerned about attracting new customers
 - Thinks most customers acquired via cold calling
- Experiences difficulty finding experienced CAM programmers
- Little interest in joining online associations/groups

- Sales and marketing departments are especially concerned with understanding buying behaviour. Consumer psychology

“...there are four types of buying behavior when it comes to making purchasing decisions: assertive, analytical, social, and amiable.”



“The purpose of business is to obtain and serve customers.”

Peter Drucker



studies (For example Larry Wilson’s book ‘The Social Styles Handbook’) have shown that there are four types of buying behaviour when it comes to making purchasing decisions: ‘assertive’, ‘analytical’, ‘social’, and ‘amiable’. These buying behaviours are the driving force behind most purchasing decisions, regardless of how a customer fits in with more general customer profiles.

- ‘Assertives’ want control and achievement of measurable goals and results.
- ‘Analyticals’ want to know every detail of the product before they’ll make a purchase decision.
- ‘Socials’ highly value the opinions of others and are strongly influenced by them when making a decision.
- ‘Amiables’ appreciate relationships and are far more influenced by personal approach and appreciation of their individual circumstances than by technical details of the solution.

Most people are a combination of two or more of these and sales people who have been successful have done so by learning to adapt to their customer whatever buying behaviour or combination of them they encounter.

But now imagine instead using the insights of the Buyer Persona to train all of your sales people in the best way to address the target customers.

The point is that through Buyer Personas your whole company can understand and anticipate issues from the customer perspective and have a shared vocabulary to discuss them internally as well as externally in the customers’ phraseology.

As Peter Drucker put it, ‘*the purpose of business is to obtain and serve customers*’ – so everything your business does, can and should be tied back to your Buyer Personas; what your staff focus on, where they allocate their time, how your customer experience is designed, how your products are developed, how the website is navigated and the copy presented, how leads are nurtured and more.

4. HOW DO YOU OBTAIN THEM?

It’s probable that no one in your company has all the information needed to create insightful Buyer Personas and you certainly can’t make it up so research is required.

The foundation of Buyer Personas is comprehensive research into buying behaviour, skilfully conducted by experienced personnel to uncover deep insights into buyer mindset and decisions. This encompasses qualitative research, ethnographic research, business anthropology, digital anthropology and buyer psychology.

“People buy what they need from those who understand what they want.”

Bill Brooks and Tom Travesano



So how do you do that research? Firstly you need personnel qualified and experienced in doing this type of research and creating Buyer Personas. Secondly, as long as you know how to ask them, how to establish rapport, buyers will tell you how they evaluate and compare products or services and reach decisions.

Your options are:

- If you don't already have the skills in-house you can have your team trained (the Buyer Persona Institute is one source of such training) and give them some time to practice and perfect their technique so you are confident in their results
- Hire new team members with the required proven expertise and experience
- Hire a market research firm whose ability is proven by satisfied customers – often a good way to avoid biases.

HOW TO INTERVIEW

It may surprise you but buyers will reveal facts to you that they haven't shared with anyone else - but probably only if you are able to hold relaxed and wholly unscripted, but nonetheless agenda-driven, conversations with them.

Because so much interpersonal communication is non-verbal, face-to-face meetings are ideal and can provide greater depth of information, tolerance for longer interviews and better rapport with the interviewer. But they can be costly to do, particularly if customers are geographically dispersed thus adding considerable travel time and cost. On the other hand experienced interviewers can achieve excellent results more cost effectively via telephone interviews. For a lower cost more customers can be reached, but still with a good level of detail (although perhaps not the depth enabled by face to face), generally more quickly but likely with less rapport and non verbal cues. A third alternative is to use web meetings with high resolution video to help pick up more non verbal cues.

Whichever interviewing methodology is used, you want a deep conversation in order to find the insights you need and you'll need an agenda template as a guide to obtaining full information to prepare a Buyer Persona – the goal is to include essential information and profound insights in a focused but uncluttered description that excludes irrelevant information.

The required qualitative research is a skilfully steered conversation with buyers that explores the subject deeply. A Buyer Persona that simply states the obvious will achieve little and may simply undermine the initiative. It's very likely that you and your sales team already know or can readily guess the answers to the obvious questions (e.g. why are you looking to buy this product?) so the research must dig much deeper into the whys and wherefores of motivations, concerns, fears, objectives, personal goals and much more (how do they decide? How will they know they made the



right decision?). Often you will discover mindsets and mental models that Buyers themselves are unaware of but that influence their behaviour – understanding these can be the difference between a won and a lost sale. Getting to ‘why’ a person behaves in a particular way takes skilled interviewing to get beyond defence mechanisms and smoke screens intentionally or subconsciously put up as shields from a selling organization – for this reason a third party qualitative researcher often has an advantage over company representatives.

For example, an interviewee may say that your product is interesting but is missing a feature. That information may or may not be an insight you need but, as the interviewer, your job is to get to the core of WHY someone is asking for that feature. It's the need behind the feature that may be the insight you seek and the feature as described by the customer may or may not be the best way to meet the need.

WHO AND HOW MANY TO INTERVIEW

Start with your sales team, tell them what you are doing and why to get them actively engaged and supportive of developing Buyer Personas. You need their insights to create the Personas and you need their support to use and apply the Buyer Personas once they are available. Ask questions like:

- What are our prospects' or customers' biggest objections?
- What are the common goals people have?
- What problems are they trying to solve?
- Is there a particular demographic that makes better customers?
- What's the most effective way to contact them? - by phone, email, etc.

After interviewing your sales team move on to interview current customers Then interview prospective customers – it can even be advantageous if they know nothing about your company, products or services because the interview is wholly about them not you. Don't ask people what they would do rather ask what they did do.

This mix of external interviewees, customers and prospective customers, is to ensure no bias is introduced. It's also vital to understand any real differences between what may exist between groups, for example, an insight may solve one group's challenges but not another group's.

How many interviews to do is a function of when you start to see repetition, the same insights coming up repeatedly and no new ones being revealed. At that point you have convergence for the current time and can write your Buyer Persona.

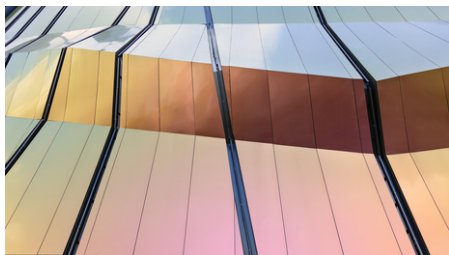


5. BUSINESS ADVANTAGE BUYER PERSONA INTERVIEW GUIDE

Please understand that this is an interview guide, it is NOT intended as a questionnaire and should NOT be used as one. It is just a guide to some subject areas that the conversation must explore when seeking profound insights for a Buyer Persona.

Subject	Some Subject Areas to Explore
Personal Details	Name; Age; Marital and family status; Education; Qualifications
Company Details	Name; Revenue; Employees; Industry; Purpose
Professional Role	Job title; Role; Responsibilities; Knowledge and Skills required; Reporting Structure (up and down); Describe a typical day
Goals, Purposes, Challenges, Success	How are goals, purposes and challenges (business and personal) going to be accomplished and success measured? Why depart from the status quo?
Obstacles, Frustrations and Pain Points	How are behaviour and mindset affected by business or personal obstacles and frustrations, what are they and how will they plan to overcome them? Why will they spend time and budget to resolve?
Buyers	Who's involved and what are their behaviours - Buyers, Influencers, Decision makers...?
Buying Preferences	How, where (e.g. channel) and when do they buy and most importantly why are these their preferences? Why do buyers invest in solutions like yours, and what is different about buyers who are satisfied with the status quo? Map out their purchasing and procurement policies, buying process, activities and decision making behaviourally and why?
Thinking Preferences	How they think and why they make buying decisions – principles, attitudes; beliefs, motivations; perceptions that affect behaviours
Watering holes	How they obtain or learn about new information relevant to their job – choices and behaviour with regard to media, associations, social networks
Communication Preferences	Preferred ways to receive and give information and how these affect or determine behaviours
Research Preferences	Preferred ways to research vendors, products, services; how content is used and how it affects or determines behaviours

6. COMMON MISTAKES TO AVOID



“You need to find the story the data wants to tell you (not what you want it to tell you).”



● NOT DISCOVERING PROFOUND INSIGHTS

Personal and company details, professional role details, even their goals, are easily obtained by you or your competitors. These are important parts of recording your research but the least important parts of your Buyer Persona.

To persuade buyers to choose you, your personas should include profound insights into behaviour including how they evaluate their options, compare solutions and make decisions and why they do it the ways they do.

● BUILDING TOO MANY PERSONAS

Many people initially equate Buyer Personas to job titles and compound this error by defining personas for each job title in each of their existing segments e.g each industry and different company sizes. The focus needs to be on similar buyer behaviour – often the same behaviour regarding decisions you want to influence will apply across job titles, company sizes and industries.

How many Buyer Personas do you need? It depends on how many significant differences you discover in how your buyers make their decisions. The point is that each Buyer Personas increases the number of different marketing strategies and hence marketing and other resources needed. So have as few insightful Buyer Personas as possible each with strategies for persuasive messaging, content marketing, product or solution launches, campaigns and sales tactics. Then prioritize those according to your capacity to execute multiple strategies.

Marketers who segment Buyer Personas around key insights often need about half as many personas as those who focus on demographics such as job title, industry, geography, industry or company size.

The Buyer Persona Institute offers its 5 Rings of Buying Insight as guidance for when an additional Buyer Persona and targeted marketing strategy will allow you to grow revenue or achieve a strategic goal.

● PAIN POINTS BACK FITTED FROM PRODUCT CAPABILITIES

A common mistake to create or assume pain points based on the product or service capability – this is of course putting the cart before the horse!

Instead learn the pain points from Buyers without prompting or suggestion.

- **CREATING BUYER PERSONAS LIKE CHECKLISTS**

Although we will give a guide in this white paper please do not treat it like a checklist - the insights you need will come from deep conversations exposing behaviours and the reasons for them. For the same reason Buyer Personas can't be obtained by quantitative research (e.g. online surveys) alone.

- **NOT MAINTAINING UP-TO-DATE BUYER PERSONAS**

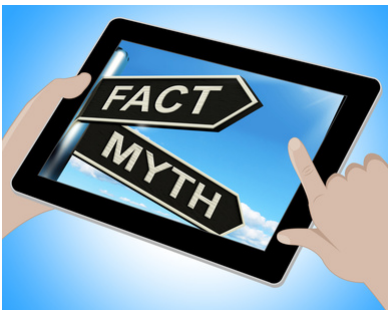
Like almost every facet of business buying behaviours continue to change at an ever increasing rate. Review your Buyer Personas every 6-12 months – probably by doing a small number of checkin interviews with a few previous interviewees and a few new ones. The objective is to confirm accuracy or update the Persona.

For example has anything changed with respect to buyers' concerns that your solution or company is not their best option? Are there any product or company-specific barriers that are no longer (or never were) factually correct? Perception changes often result from negative experiences with similar solutions, online interactions, or peer feedback. Are there any new personal or business obstacles preventing your buyer from investing in change e.g. management, competition or process changes?

- **NOT OVERCOMING YOUR OWN BIASES**

You have to ask the right questions, explore answers deeply, read between the lines, react to the clues and explore your hunches but ultimately depend on the data not your own biases. You need to find the story the data wants to tell you NOT the story you may want it to tell you.

At the same time recognize that new data will often raise as many new questions as it answers and be prepared to revisit your initial assumptions and retune your intuition to what your market may now be telling you.





Autodesk® for Small Business

"With the goal of increasing Autodesk's growth rate with Very Small Businesses (VSB) we commissioned Buyer Persona research to understand similarities and differences between VSBs across various industries, countries and cultures. The knowledge and insights gained are enabling better product positioning and more resonant marketing campaigns for VSB. Our objectives were achieved and we definitely got the information we needed from the research. Business Advantage impressed me with their ability and professionalism."

Senior Manager, Small
Business Strategy and
Development, Autodesk

CASE STUDY – Autodesk

Profile

Autodesk helps people imagine, design and create a better world. Everyone—from design professionals, engineers and architects to digital artists, students and hobbyists—uses Autodesk software to unlock their creativity and solve important challenges.

Within Autodesk multiple product and market groups focus on meeting the needs of particular industries, organizations or individuals. The Small Business Strategy and Development group, as its name suggests, focuses on Very Small Businesses (VSB) and turns customer needs and insights into actionable strategy.

Problem

With the goal of increasing Autodesk's growth rate with Very Small Businesses we commissioned **Buyer Persona research** within Manufacturing and Engineering Service Providers (ESPs) industries. We also sought to understand similarities and differences between VSB in these and other industries as well as across countries and cultures. With this knowledge and insight we anticipate developing better product positioning and much more resonant VSB marketing.

Solution

We selected Business Advantage primarily because they are a long term and well proven Autodesk Market Research partner. With nearly 200 market research projects completed for Autodesk they are obviously high calibre, quantitative and qualitative market research professionals who thoroughly understand Autodesk's business and markets. They fully lived up to and deserve their excellent reputation – I was delighted with their depth of experience, their responsiveness, their willingness to go above and beyond - they fielded and analyzed this research (more than 400 individual interviews across multiple countries and languages) to an extremely tight timetable, their flexibility to adapt and tune the process based on the initial results. The project ran very smoothly, reporting was regular and any course adjustment executed flexibly and immediately.

Results

The results corroborated and validated many of our VSB expectations – for example most are pressed for time, wear many hats and need to tightly manage costs – but we also noted very interesting differences between industries and countries – for example with respect to reseller relationship expectations. In addition we gained useful insights on VSB use of competitive software tools – not just on the expected major competitors but also on how they use many, often ignored, small competitors. The fundamental persona definition was the key deliverable and we got what we wanted from the research. They thoroughly impressed me with their ability and professionalism and I have already recommended them to others.



"Business Advantage's excellent research skills and comprehensive understanding of our market have produced research results we know we can trust to underpin our marketing decisions. Recent surveys of our target markets discovered a high level of interest in our new product."

Phil Henesey, European
Channel Manager, Rasterex

"Resolve to perform what you ought; perform without fail what you resolve."

Benjamin Franklin

BUSINESS ADVANTAGE – ABOUT US

If you plan to grow in a new way, perhaps by using Buyer Personas or User Experience Personas, you should have an advantage, a business advantage. We've helped many companies make their growth journey as our market research and analyses always include actionable recommendations and implementation strategies.

Who we are

Formed in 1992 by CEO, Chris Turner, Business Advantage now has a professional staff of over 30 specialists in different markets, technologies and methodologies.

What we do

Business Advantage is a B2B research, business development and marketing consulting practice operating in the global IT, Digital Broadcasting and Telecommunications sectors. We specialize in:

- Marketing and management consultancy
- B2B market research
- Data services
- Sales development services

Our mission

To out-perform your competitors, you must get key activities right: strategy and planning, acquiring accurate market intelligence, and taking effective action to turn potential customers into real ones.

At Business Advantage, our commitment is to **help you create substantial and lasting improvements in your performance - a sustainable business advantage - over your competitors.**

Our Clients

Our clients include many leading international companies such as 3M, Autodesk, Canon, Dell, HP, Infor, IBM, Intel, Lexmark, Microsoft, Oracle, SAP, Sony, Sophos, Xerox and many small to medium sized organizations.

Additional Information

If you would like more information on this or other research, data or business development topics, please email info@business-advantage.com, call +44 1689 873636 or download other [Business Advantage White Papers](#).

Lastly – if all these tips are overwhelming please talk to us about some Consultancy to help you figure out your best Buyer or other Persona research approach.