



Using Personas as a Sales-Enablement Tool

A key part of marketing's job is to create sales-enablement tools that help the sales organization improve their effectiveness in generating revenue and increasing customer acquisition. This article explores the use of personas as a sales-enablement tool and discusses what personas are, why they are useful, and how to create them. The information from the article enables companies to develop and use personas—to give salespeople insight into the specific behaviors, expectations, and motivations of specific users and buyers in the buying process.

Marketing professionals are responsible for three things: finding new profitable customers, keeping profitable customers, and growing the value of those customers. We share the first responsibility—finding new profitable customers—with another revenue-generating arm of the company: the sales organization.

To attract new clients and to grow existing accounts, your sales and delivery teams must be able to articulate the business benefits. Research suggests that, for many sales organizations, a disproportionate amount of revenue is driven by a relatively small percentage of the sales force. Sales executives are constantly challenged to secure a greater contribution from average and lower performers. Often, sales executives try to implement a common sales methodology that leverages the processes used by the high performers. This process is known as sales enablement, and it is a key factor in accelerating customer acquisition.

For these processes to be successful, every salesperson must have the knowledge on how to handle different selling situations, such as how to position against a particular competitor and how to communicate a value proposition to each person in the buying process. The sales organization relies on marketing to create the tools to support the sales enablement process.

The purpose of these tools is to help the sales organization improve its effectiveness in generating revenue and earnings. Marketing and Sales need to collaborate with each other to ensure that appropriate materials and tools are created and properly distributed. Examples of sales enablement include tracking and disseminating best practices, providing case studies, and, more recently, creating personas.

In fact a recent study by MarketingSherpa found that 40% of business technology hardware marketers, 22% of software marketers, and 19% of professional services companies are now using personas as a sales-enablement tool. This article was written to help marketers understand what a persona is, how to create one, and how to use personas as a selling tool.

What Are Personas?

Personas are archetypal users that represent the needs of larger groups of customers, in terms of their goals and personal characteristics. Think of them as "stand-ins" for real customers. A persona seeks to zero-in on customer behavior and characteristics. A persona is a concise description of a specific customer type.

It's important not to confuse personas with profiles. Personas are narrative descriptions that bring user profiles to life. Personas present an alternative representation of user profile data that is easily understandable and is designed to communicate customer details that are easy for team members to keep in mind during the buying process. Personas should be developed



to help the salesperson recognize and identify with the prospect as people rather than a collection of facts.

An example of a profile might be as follows:

Gender: 50% Male / 50% Female
Age: 18-34
Education: Wide range: high school education, and most have a BA degree or some college education
Marital Status: 50/50 Married/Single
Comfort with Technology: Average, comfortable making purchases online

This example of a persona illustrates the differences:

Persona for Network Engineer:

Mike, 34, works normal business hours most of the time. Mike is well-paid, has 6 years of network management experience, and is a Cisco Certified Internetworking Expert. Mike started out in the network operating center and has two primary areas of responsibility:

1. Isolating and resolving the more complex network issues that have been escalated from Network technicians
2. Planning and rolling out changes to the existing network environment

Mike's job is part interrupt-driven (isolating complex problems and working out solutions) and part planned (rolling out changes to software, managing configurations). Mike uses a ticketing system and network management system regularly and also uses basic utilities for telnet/ssh, tftp, ping, trace route, etc. He is very familiar with Perl because he has experience writing scripts and has an in-depth understanding of managing networks. He does not know xml or java very well at all.

Profiles are the foundation for constructing personas. And while these two concepts seem similar, they are different. Profiles describe types of prospects, customers, or users. Personas describe specific people.

Why Use Personas?

Personas help guide decisions about product functionality, design, positioning, messaging, and overall marketing. They bring customers to life by giving them a name and/or title, personality, and in some instances even a photo. The purpose of a persona is to identify a customer's motivations, expectations, and goals. Even though personas like the one about Mike, above, are fictitious, they are based on knowledge of real customers. A well-crafted persona enables you to stand in your customer's shoes and take a more customer-centric view.

Using personas has a number of benefits, including providing the organization with a common point of view about customers' goals and needs, a vehicle for helping develop an initial set of market requirements, more focus on what customers will use rather than what customers may say they want, and a process for prioritizing development efforts.

Personas provide valuable insight into the motivations and personalities of specific buyers and



users. While they are simple in form and structure, the information they contain is powerful; it can be applied to decisions throughout the sales-enablement process. Personas can help with understanding specific requirements, facilitating alignment, and expediting the sales cycle.

Creating Personas

The value of personas is that they help you identify discrete sets of customers and create a typical customer to represent each group. The idea is that if you create products/services for the personas, customers with similar goals and needs will also be satisfied. Therefore, we have found that conducting customer research is the best way to ensure the persona actually represents the customer rather than reflects internal opinion. The purpose of the research is to identify trends or patterns in user behaviors, expectations, and motivations to form the basis of the personas. One of the best ways to gather this data is to interview real customers. You will need access to real customers to conduct the research. Your first step will be to decide whom to interview, and you should include current as well as potential customers. Plan to conduct at least 15-20 one-hour long interviews for each persona type.

Interviews should focus on gathering information about the following:

- Basic demographics such as age, job title, length of time in position, and length of time with the organization
- Job responsibilities and what a typical day looks like
- Tasks that take the longest and those that are the most critical or are performed most often
- Major frustrations with the job and the organization
- What the person likes best about his/her job
- What teams or which people within the organization the person most interacts with
- Skill levels relating to the job as well as technology
- How time-poor or -rich the person is
- Goals, attitudes, beliefs (conscious and subconscious)

Your goal is to uncover customer attitudes and behaviors. Common questions include these:

- What things frustrate you the most?
- What makes a good working day?
- What make a frustrating working day?
- What will help you to do your job better?
- How much of your day is spent putting out fires?
- What kind of problems are these fires?

Once you complete all of the interviews, review the data to find patterns and clusters. These clusters can then help you to define the customer's attitudes and behaviors. Give each persona a brief description. There is no ideal number of personas; however, we suggest keeping the set small—perhaps four or five primary personas.



After you've identified the clusters, you can start creating the personas by adding details from the interviewees' behavioral traits. Analyze your interviews and select details that stand out—such as working environment, frustrations, relationships with others, skill level, and demographics—to include in your narrative. Then give each persona a name and a photo or graphic representation.

When finished, you should have captured information about your customer's goals, needs, behaviors, concerns, experiences, likes, dislikes, etc.

Here are some tips to follow regardless of whether you write your personas as narrative or bullet points:

- Keep your personas to one page.
- Add personal details but don't go overboard.
- Include goals for each persona.

Turning Personas Into a Sales-Enablement Tool

Once you have developed several detailed personas describing your customers, you can adapt and customize your sales tools.

The reason to invest in creating a persona is to help you to identify and communicate customers' needs efficiently and effectively. These "stand in" customers, based on real customer data, give prospects a name and identity and make it easier for sales personnel to connect with prospects. Messages that resonate with each persona can be developed, and sales presentations and materials customized accordingly.

Using personas allows you to better focus your sales and marketing training and materials improving your overall effectiveness.