Bridging the Gap: Sales Enablement Tools and Personas

A three-part series on sales enablement tools
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As marketing professionals, we are responsible for three things: finding new profitable customers, keeping current profitable customers and growing the value of those customers. And we share that first responsibility—finding new profitable customers—with another revenue-generating arm of the company: the sales organization. But unfortunately, research suggests that a disproportionate amount of revenue is driven by a relatively small percentage of the sales force, meaning sales executives are constantly challenged to secure a greater contribution from average and lower performers via sales enablement tools.

And, while there are a multitude of noteworthy sales enablement solutions for executives to choose from, there are three sales enablement tools in particular that marketing personnel can use to generate great value: personas, use cases and playbooks.

Over the next three months, I'll explore each of these tools and discuss how they can help your sales organization improve effectiveness by giving salespeople access to the right information at the right time. This month, we take a look at personas…

Using Personas vs. Profiles

Persona usage in marketing is on the rise, and perhaps you've recently heard the term yourself. In fact, a 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. But what exactly is this rising trend?

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, so it's important not to confuse personas with less-specific fact-listing profiles. Personas are narrative descriptions that communicate customer details that are easy for team members to keep in mind during the buying process.

An example of a profile might be as follows:
- Gender: 50% Male / 50% Female
- Age: 18-34
- Education: 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:

In contrast, a persona might look like this:

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 Interne-tworking 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 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 are fictitious, they are based on the 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. The idea is that if you create products/services for the personas, customers with similar goals and needs will also be satisfied. While simple in form and structure, the information they contain is powerful: It can be applied to decisions throughout the sales-enablement process to help with understanding specific requirements, facilitating alignment, and expediting the sales cycle.

Creating Personas

Conducting customer research, via interviewing real customers, is the best way to ensure the persona actually represents the customer, rather than reflecting internal opinion. Your first step will be to decide who to interview, and you should include current as well as potential customers. Plan to conduct at least 15 to 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:

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 kid 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 customers' attitudes and behaviors. Give each persona a brief description. There is no ideal number of personas; however, we suggest keeping the set small—perhaps a maximum of 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 responses 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 customers' 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 then 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 can be customized accordingly.

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