



CREATING CUSTOMER PERSONAS

No one sells to companies. Everyone, even B2B (business to business) sellers sell to people. Part of planning to win is thinking about the pains, gains, and motivations of your customer well before you make contact. The purpose of this Tool is to give you a framework for creating customer personas as part of your sales prep. The benefit is that before you approach your customers to help them make progress, you will have an idea of what is important to them, and you will be able to tailor your approach accordingly.

CUSTOMER PERSONA <i>Title or Role of Customer</i>	WHAT WE KNOW <i>Info that can be quickly researched</i>	WHAT WE SHOULD ASK OURSELVES BEFORE MAKING CONTACT <i>Questions that will help guide our approach. Thinking of these questions and answering as best we can before contact will unlock insights around the customer's functional, social and emotional needs.</i>
EXAMPLE 1: VP of Sales <i>You are selling online advertisements</i>	<ul style="list-style-type: none"> • Reports to the CEO • Sales growth has slowed • Leads national team of sellers • Company is less than 10 years old 	<ul style="list-style-type: none"> • What is this customer's background? Have they been in newer companies before? Or are they coming from more established companies? • What is the relative age/experience of their national sales team? Do they have newer sellers that need more guidance? Or are they working with an experienced team? • Are we seeing online ads for this company anywhere in the market? • What messaging is the CEO putting out into media about growth expectations? How much pressure is that putting on the VP of sales?
EXAMPLE 2: Human Resources Manager <i>You are selling yourself into a sales role</i>	<ul style="list-style-type: none"> • Hiring for roles across the organization • Sales role has been posted for several weeks • Role reports to Sales Manager • Company sells health care devices 	<ul style="list-style-type: none"> • What role does this customer play in the interview process? • How much influence does this person have with the Sales Manager? • What are the values of the company and how do these translate into valuable characteristics of a job candidate? • How much pressure do they feel to fill the various open roles? • Is there something about the job (not apparent from the job description) that has prevented the role from being filled already?



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Below are exercises for you to practice developing personas. First, you will use a persona from a past assignment and create a series of questions (at least 3) to consider as you plan for contact. Second, you will create a persona based on your personal sale to be made, fill in research, and develop a series of questions (at least 3) to consider as you plan for contact.

CUSTOMER PERSONA

Title or Role of Customer

WHAT WE KNOW

Info that can be quickly researched

WHAT WE SHOULD ASK OURSELVES BEFORE MAKING CONTACT

Questions that will help guide our approach. Thinking of these questions and answering as best we can before contact will unlock insights around the customer's functional, social and emotional needs.

FROM ACCOUNT PLANNING ASSIGNMENT:

Adam the Stay at Home Dad

*You are a seller at
Pup, My Best Friend*

- Adam has two young children and a spouse who works out of the home
- Adam is a homeowner
- Adam is 38
- Adam is an avid runner

FROM YOUR SALE TO BE MADE:

Who is your likely persona & what are you selling? What do you know?

What questions are you going to ask yourself as you prepare for contact?