

How to Create Buyer Personas

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What Are Buyer Personas?

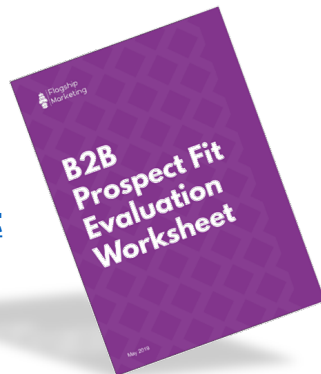
Buyer personas are fictional, generalised representations of your ideal customers. They help you understand your customers (and prospective customers) better, and make it easier for you to tailor content to the specific needs, behaviors, and concerns of different groups.

The strongest buyer personas are based on market research as well as on insights you gather from your actual customer base (through surveys, interviews, etc.). Depending on your business, you could have as few as one or two personas, or as many as 10 or 20.

Start small, do the work to get them right, and add more if needed..

**Helpful tool #1: Download Positioning Statement Workbook,
by clicking on the link.**

[Download our free
Positioning Statement
Workbook here](#)



Before you can even think about creating personas, you have to understand exactly how you want to be positioned; who you are serving and why.

This workbook will challenge you to get your positioning right - to understand how you are distinctive from your competitors - critical in the overcrowded FinTech sector.

What Are Negative Personas?

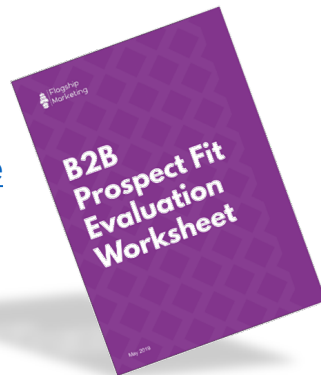
Whereas a buyer persona is a representation of an *ideal* customer, a negative -- or “exclusionary” -- persona is a representation of who you *don’t* want as a customer.

This could include, for example, professionals who are too advanced for your product or service, students who are only engaging with your content for research/knowledge, or potential customers who are just too expensive to acquire (because of a low average sale price, their propensity to churn, or their unlikeliness to purchase again from your company.)

Before you start writing your negative personas you will need to determine who they are.

Helpful tool #2: Download our B2B Prospect Evaluation Worksheet, by clicking on the link.

[Download our free B2B Prospect Fit Worksheet here](#)



It will help you determine the prospects that your FinTech should be engaging with. It will also help you understand why a prospect may not be a good fit.

And ask yourself this:

“What kind of company would I **not** want to do business with? Why?”

3 Ways To Use Your Buyer Personas

1. Personalise or target your marketing for different segments of your audience. For example, instead of sending the same lead nurturing emails to everyone in your database, segment by buyer persona and tailor your messaging according to what you know about those different personas.
2. Create negative personas, to segment out the “bad apples” from the rest of your contacts. This will help you achieve a lower cost-per-lead and cost-per-customer and see higher sales productivity
3. Combine with lifecycle stage (i.e. how far along someone is in your sales cycle) to map out and create highly targeted content.



4 Ways To Research Buyer Personas

Buyer personas are created through research, surveys, and interviews of your target audience. Include a mix of customers, prospects, and those outside of your contact database who might align with your target audience:

1. Interview clients to discover what they like about your product or service.
2. Look through your contacts database to uncover trends about how certain leads or customers find and consume your content.
3. Use form fields that capture important persona information. (For example, if your personas vary based on company size, ask each lead for information about company size on your forms.)
4. Solicit your sales team's feedback on the leads they are interacting with most. (What types of sales cycles does your sales team work with? What generalisations can they make about the different types of customers you serve best?)

Buyer Persona Templates

You can use the following 4 templates to organise your persona data.

Name of Persona	SAMPLE SALLY
BACKGROUND Job? Career path? Family?	<ul style="list-style-type: none"> Head of Human Resources Worked at the same company for 10 years; worked her way up from HR associate Married with 2 children (10 and 8)
DEMOGRAPHIC Male or female? Age? Income? Location?	<ul style="list-style-type: none"> Skews female Age 30 - 45 Dual HH Income: \$140,000 Suburban
IDENTIFIERS Demeanor? Communication preferences?	<ul style="list-style-type: none"> Probably has an assistant screening calls Asks to receive collateral mailed/printed

Name of Persona	SAMPLE SALLY
GOALS Primary goal? Secondary goal?	<ul style="list-style-type: none"> Keep employees happy and turnover low Support legal and finance teams
CHALLENGES Primary challenge? Secondary challenge?	<ul style="list-style-type: none"> Getting everything done with a small staff Rolling out changes to the entire company
WHAT CAN WE DO ...to help our persona achieve their goals? ...to help our persona overcome their challenges?	<ul style="list-style-type: none"> Make it easy to manage all employee data in one place Integrate with legal and finance team's systems

Buyer Persona Templates

Name of Persona	SAMPLE SALLY
<p>REAL QUOTES About goals, challenges, etc</p>	<ul style="list-style-type: none"> • "It's been difficult getting company-wide adoption of new technologies in the past." • "I don't have time to train new employees on a million different databases and platforms." • "I've had to deal with so many painful integrations with other departments' databases and software."
<p>COMMON OBJECTIONS Why wouldn't they buy your product/service?</p>	<ul style="list-style-type: none"> • "I'm worried I'll lose data transitioning to a new system." • "I don't want to have to train the entire company on how to use a new system."

Name of Persona	SAMPLE SALLY
<p>MARKETING MESSAGING How should you describe your solution to your persona?</p>	<ul style="list-style-type: none"> • Integrated HR Database Management
<p>ELEVATOR PITCH Sell your persona on your solution!</p>	<ul style="list-style-type: none"> • We give you an intuitive database that integrates with your existing software and platforms and lifetime training to help new employees get up to speed quickly.

Blank Buyer Persona 1 Templates

We've provided blank templates for developing 2 personas. If you need more, simply select the slide thumbnails on the left-hand side, right click, and choose "Duplicate."

Name of Persona	Persona 1	Name of Persona	Persona 1
BACKGROUND Job? Career path? Family?	<ul style="list-style-type: none"> • Job • Career Path • Family life 	GOALS Primary goal? Secondary goal?	<ul style="list-style-type: none"> • Primary Goal • Secondary Goal
DEMOGRAPHIC Male or female? Age? Income? Location?	<ul style="list-style-type: none"> • Gender • Age • Income • Location 	CHALLENGES Primary challenge? Secondary challenge?	<ul style="list-style-type: none"> • Primary Challenge • Secondary Challenge
IDENTIFIERS Demeanor? Communication preferences?	<ul style="list-style-type: none"> • Demeanor • Communication Preference 	WHAT CAN WE DO ...to help our persona achieve their goals? ...to help our persona overcome their challenges?	<ul style="list-style-type: none"> • What we can do point 1 • What we can do point 2

Blank Buyer Persona 1 Templates

Name of Persona	Persona 1	Name of Persona	Persona 1
<p>REAL QUOTES About goals, challenges, etc</p>	<ul style="list-style-type: none"> • Quote 1 • Quote 2 • Quote 3 	<p>MARKETING MESSAGING How should you describe your solution to your persona?</p>	<ul style="list-style-type: none"> • [Type in your marketing message]
<p>COMMON OBJECTIONS Why wouldn't they buy your product/service?</p>	<ul style="list-style-type: none"> • Common Objection 1 • Common Objection 2 	<p>ELEVATOR PITCH Sell your persona on your solution!</p>	<ul style="list-style-type: none"> • [Type in your elevator pitch]

Blank Buyer Persona Templates

Name of Persona	Persona 2
BACKGROUND Job? Career path? Family?	<ul style="list-style-type: none"> • Job • Career Path • Family life
DEMOGRAPHIC Male or female? Age? Income? Location?	<ul style="list-style-type: none"> • Gender • Age • Income • Location
IDENTIFIERS Demeanor? Communication preferences?	<ul style="list-style-type: none"> • Demeanor • Communication Preference

Name of Persona	Persona 2
GOALS Primary goal? Secondary goal?	<ul style="list-style-type: none"> • Primary Goal • Secondary Goal
CHALLENGES Primary challenge? Secondary challenge?	<ul style="list-style-type: none"> • Primary Challenge • Secondary Challenge
WHAT CAN WE DO ...to help our persona achieve their goals? ...to help our persona overcome their challenges?	<ul style="list-style-type: none"> • What we can do point 1 • What we can do point 2

Blank Buyer Persona 2 Templates

Name of Persona	Persona 2	Name of Persona	Persona 2
<p>REAL QUOTES About goals, challenges, etc</p>	<ul style="list-style-type: none"> Quote 1 Quote 2 Quote 3 	<p>MARKETING MESSAGING How should you describe your solution to your persona?</p>	<ul style="list-style-type: none"> [Type in your marketing message]
<p>COMMON OBJECTIONS Why wouldn't they buy your product/service?</p>	<ul style="list-style-type: none"> Common Objection 1 Common Objection 2 	<p>ELEVATOR PITCH Sell your persona on your solution!</p>	<ul style="list-style-type: none"> [Type in your elevator pitch]

About Us

Flagship Marketing was founded in 2018 to partner with FinTech firms that want to grow more.



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