Persona Creation Worksheet

Use this worksheet to develop and organize research to help build out a persona. The first section provides a general outline of the position. The second section takes that outline and looks at it through the lens of our product/service. In the same way that surveyors ask the same question different ways to ensure they are getting an accurate response, some of the questions in the second section are slightly redundant. This helps ensure we’re on the right path.

This is your scratchpad, as you do the research, throw everything that you think might help build the profile in here. It should be *at least* ten pages when you finish the research phase. After we compile the research, we’ll take this information and slim it down into a one-page quick reference guide.

**Performing the research**

There are a variety of ways to conduct this research, some more involved than others. The important thing is to do the research to validate or invalidate your findings and continually update it based on feedback from the field.

* Consult your internal teams
  + Conduct working sessions with cross-departmental groups
  + Do you have the same title in your office? Interview them
* Consult current customers
  + ID current customers willing to help and interview them
  + Or have them validate your working draft
* Conduct surveys at trade shows
  + Provide giveaways for participation in an interview or focus group
* Contact professional associations
  + Ask if you can survey or talk to some members. Be sure to make it clear that this is not a sales pitch.
* Internet research
  + Review job descriptions
  + Trade articles
  + Association surveys
  + Conference keynotes and learning paths

Section I (General Persona Characteristics)

**Most Commonly Used Persona Title:**

**Alternate Titles:**

**Job Description** (one paragraph narrative)**:**

**Education and certifications** (Any relevant degrees/certifications the person might have or need to hold this position):

**My primary goal at work is to** (one sentence narrative)**:**

**My biggest challenges in this role are (list at least five):**

**My days are spent:**

1. In the office
2. Out of the office
3. Both

Additional info:

**Top five duties:** Cross reference job descriptions and highlight the ones that recur the most. Or look for survey data.

**Responsibilities (Top 10):** Typically, from job descriptions.

**I report to this title:**

**These titles report to me:**

**These skills are typically required for this job**: Typically, from job descriptions.

**I use these tools to get my job done:** On daily basis, what tools is this person using?

**To excel at work, I should:** Think about what this person needs to do to go above and beyond in this role. This is more than just daily responsibilities. If they want to be a superstar, what should they be doing?

**I read these publications:** Online and print sources, twitter hashtags, influencers, etc.

**I am a member of these professional associations:**

Section II (Product/Solution-Specific Characteristics)

**Key initiatives** – Revisit the job description, goals, and challenges listed above. If I were to implement initiatives to drive improvements in those areas, how does the company’s product/service help me achieve those?

*For example:*

* *Goal: Improve department efficiency*
  + *We offer automated approval workflows that can save time and reduce data entry*

**Key results** – What results does this person expect to achieve by working with our company? And how do we specifically help them achieve those results? Refer to “To excel at work, I should” in previous section.

*For example:*

* *Improved operating efficiency/Simplified procurement*
  + *One point of contact for questions/concerns*
  + *One vendor for all needs (simplified billing, contacts)*
  + *Help identifying ways to save money*
    - *Internal (usage)*
    - *External (procurement)*
    - *Provide advice on pricing, term of contract, best month to renew, and analyzing expected changes in the industry.*
* *Greater political capital* 
  + *Issues have been smoothed out thanks to this persona’s work*
  + *Costs are down*

**Key barriers** – What concerns cause your buyers to believe that your solution or company is not their best option? What objections (founded or unfounded) do they commonly raise? And how do we address each?

*For example*

* *Already have a solution* 
  + *It doesn’t hurt to see what else is out there, if nothing else it gives you leverage when you’re up for renewal.*
* *Cost*
  + *Let’s learn a little bit more about your goals before we discuss pricing.*
* *Decent service from current provider (don’t know what they’re missing)*
  + *That’s great. What do you like about them?*

**Buyer’s journey** – What impacts this person as they evaluate their options and make a decision? Who else is involved in the decision-making process? How long does it take to decide?

*For example:*

* *What might trigger them to look for a new solution?*
  + *Current solution failure*
  + *Price increase*
  + *New executive staff*
  + *New regulation*
  + *Cuts in staffing*
  + *Company/department goal to improve/increase performance in specific area*
* *What resources do they use to research a solution to the problem?*
* *Who else is involved?*
* *About how long does it take to make a decision?*

**Decision criteria** – What criteria does this person identify as most critical, and what do they expect for each one? This could depend on the trigger event listed above.

***For example:***

* *Good prices*
  + *In line with, or better than competitors*
* *A partner who can lighten the load*
  + *Do not have in house expertise to handle nuts and bolts, looking for a vendor to provide high degree of customer support.*
* *Must-have (table stakes) feature*
  + *Automated data validation*

**Common competitors and brief description –** Who else is competing for this person’s business in your space? And what is their unique value proposition? Why would this person choose them over your solution?

Competitor X – Is well known for superior customer service.

Competitor Y – Is well known for low prices.

**Value Propositions, how our company helps (Persona):***For example:*

* *Cost control* 
  + *Holistic look at usage and procurement needs*
  + *Innovative value-add services that can save you money without having to cut other areas*
* *Ease of doing business - One vendor for all your needs. Rather deal with one vendor than six.* 
  + *Simplified operations - One bill for multiple locations*
  + *Succinct record of all transaction history with predictable invoicing*
  + Automatic ordering and delivery with leased tanks

**Persona Lingo –** Are there any terms or acronyms commonly used by these personas? List and define them here.

*For example*

* ***Days sales outstanding (DSO)*** *- In accountancy, days sales outstanding (also called DSO and days receivables) is a calculation used by a company to estimate their average collection period. It is a financial ratio that illustrates how well a company's accounts receivables are being managed. The days sales outstanding figure is an index of the relationship between outstanding receivables and credit account sales achieved over a given period.*

**For further reading –** In doing your research, if you come across articles that you think staff would benefit from reading, paste the links here.

*For example:*

* *https://www.investopedia.com/articles/professionals/051713/day-life-cfo.asp*