CUSTOMER PERSONA tool description & worksheet
Version 1.0

WHAT?

Enables you to identify and focus on the people who are most likely to need and buy your product. Who is most likely to buy? How can you recognize them? What are typical behaviors, attitudes, age groups and other characteristics?

WHY?

A clear description of your customers makes it possible to refine your product or service so customers recognize it as appealing and distinct from the competition. It enables you to describe target markets better and to use resources in a more focused, efficient way.
Follow these steps to create a concise but complete description of your target customer.

**STEP 1: NAME THE PERSONA, AND ADD A VISUAL IMPRESSION**

Give the persona a name to create a realistic personality rather than a neutral fact sheet of characteristics. This name should communicate the essence of the persona in relation to your business (for example 'Large Volume User').

Add a photograph or drawing, to that represents the image of the persona. This helps you to imagine a real-life customer.

**STEP 2: DESCRIBE THE MAIN CHARACTERISTICS OF THE PERSONA**

Use concise phrases to describe the profile of the typical customer you want the persona to represent. Base you description on the following categories:

**Demographic – characteristics related to general facts on population**

- Gender
- Age
- Ethnicity
- Religion
- Location
- Education level
- Occupation
- Income
- Marital status
- Family size
- Other:

**Psychographic – characteristics related to what a person thinks and feels**

- Attitudes
- Beliefs
- Values
- Family stage
- Lifecycle stage
- Interests
- Lifestyle

Alternative questions to ask:

- What does he / she dream about?
- What keeps him / her awake at night?
- Who does he / she trust?
- Who does he / she see as her community?
Behavior – characteristics related to what a person does

Focus on aspects that influence the appeal or use of your product by the customer.

- Buying frequency and volume
- Special buying occasions
- Loyalty
- Most valued product/service feature (price, quality, convenience)
- Preferred distribution channel
- Current pattern of use (for example, based on volume, frequency, or other)

STEP 3: DESCRIBE OTHER RELEVANT INFORMATION ABOUT THE PERSONA, RELATING TO YOUR BUSINESS

Add a brief description other relevant information that illustrates the typical customer you want the persona to present. Think specifically of information that describes elements of the persona’s everyday life relating to your business.

- **Pain points** – what kind of hindrances or problems do they have which influence their use of your product?
- **Goals** – what kind of goals are they trying to achieve which your product plays a role in?
- **Skills** – which skills does your product require? Which do they have? What is the level of skill?
You're ready to define your target market more precisely and make better decisions about the product, sales channels and other matters because you can look at the options from the point of view of your typical customers.
CUSTOMER PERSONA
guidelines for consultants
Version 1.0

WHEN?

When important decisions have to be made about sales channels, key activities or other important aspects of the enterprise, and there is a lack of clarity or widely differing opinions, Customer Personas can help make the right decisions and to support them with a clear rationale.
To ensure actionable results, keep these guidelines in mind:

1. **BUILD A LIBRARY OF PHOTOGRAPHS IN ADVANCE**
   Getting photos can be time-consuming. Make and collect them in advance.

2. **FIND OUT THE TERMS AND CONDITIONS FOR USE OF PHOTOGRAPHS**
   Check the terms and conditions for use of the photographs. If you use magazines or other sources which you do not own the right to, **include a disclaimer that they are for non-commercial and/or internal use only.**

3. **EXPLAIN WHY THE EXERCISE IS NECESSARY**
   Use a real case either of the current or similar client to demonstrate the necessity and value of the Customer Persona. In your explanation, **show how the Customer Persona helped the client make a correct choice** when confronted with various options.

4. **YOU CAN USE A DRAWING**
   A simple drawing can also work well to embody a Customer Persona. A drawing (such as an outline of a human figure made with a single line) can often excite as much or more empathy and imagination than a photograph. There are no limits to what it can include. It also can create a greater sense of ownership as it is the group’s own creation.

5. **KEEP IT CONCISE**
   A Customer Persona should be contained in a document which takes up no more than 1 to 2 A4 sheets, and which is easily scannable. It is designed to be read at a glance while at work, and is often hung on the wall of a workspace. The worksheet helps to collect the main input, but if it does not perfectly fit the session you have in mind or is in some other way too limiting do not hesitate to adjust, extend or redesign the worksheet.

6. **FORM A DIVERSE GROUP OF PARTICIPANTS**
   It’s important that no one group’s perception dominates the view of the customer. An engineer, a lawyer, a sales and repair person have different kinds of knowledge of the experience of customers. Participants can also include people from outside the company who are customers or have relevant experience.
SETTING AND APPROACH

TIME
30 minutes to 2 hours (including a half-hour for documentation).

MATERIALS
Large print, drawing or slide of the worksheet; pin board or whiteboard; workshop materials (markers, cards, lots of Post-its, etc.)

TEAM
You will need one facilitator and one or more people representing a broad cross-section of the client enterprise so enough different perspectives on the customer are present.
For larger groups: have people in smaller groups fill in one and the same section and present the outcomes. Discuss them and create characteristics before moving on to the next section.

DOCUMENTATION
You can use Post-Its, but it's best to write out the characteristics of the persona on the board or worksheet so that they remain visible for all participants while they're working.
A Customer Persona can be used as a basis for several tools such as Value Proposition, Customer Segmentation and Marketing.
FURTHER READING

CUSTOMER PERSONA

Enables you to identify and focus on the people who are most likely to need and buy your product.

<table>
<thead>
<tr>
<th>Main characteristics</th>
<th>Name of persona:</th>
<th>Other relevant information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demographic:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Psychographic:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Key behaviour:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Add a drawing or photo

Goals:

Pain Points:

Skills: