

Video 1: Why are buyer personas an important part of your inbound strategy?

Hey, it's Kyle from HubSpot Academy. One of the most important things your company needs to do is create a concrete definition of who your ideal customer is. Not everyone is going to buy your product, nor should you want them to. Some people just aren't a good fit for your offering, and if you market and sell to them and get them to buy, they'll find out first hand just how bad of a fit they are, and their negative reviews and unsavory social media posts might scare away people who actually would be a good fit.

If you want your company to grow better, you need to have a deep understanding of your ideal customer. To get there, we recommend creating a buyer persona. A buyer persona is a semi-fictional representation of your ideal buyer based on data, interviews, and some educated guesses. Essentially, it's a definition of your ideal buyer presented in such a way that it sounds like it's talking about a specific person. So you aggregate information about a particular kind of person in your target market, find an avatar to represent that kind of person, and give them a name. Buyer personas are often named something memorable and alliterative, like Management Margaret or Skeptical Suzy. This makes it easier for your team to remember them and keep them in the front of their minds.

Personas have been around for a long time, and different people have different ideas of how they should be created and used. In many cases, personas are developed by marketing teams to guide their marketing efforts. They might be a collection of demographic information and personal preferences, with the purpose of helping the marketing team create content that will resonate emotionally with a particular category of people. All of that is good, but personas have the potential to be so much more than just a marketing tool. Your personas should have just as much value for your sales and services teams as they do for your marketers.

Think about it this way: If your marketing teams has a persona they're marketing to, while your sales team has an ideal company profile that they use to qualify their leads, and your services team has another set of criteria they use to measure customer satisfaction, your teams are going to be disjointed, and your customers will feel it. With marketing talking to your customers in one way, and sales rebooting the conversation when they take over, and then services having a completely different set of expectations about what your customers need and want, there's going to be a lot of frustration internally and externally. And the results will be inefficient teams and unhappy customers.

On the other hand, if you can create a single, unified persona that is robust enough to guide your marketing campaigns, your sales conversations, and your services activities, your customers will enjoy a seamless end-to-end experience, and your internal teams will enjoy the benefits of being well aligned with each other.

To give you an idea of what that can look like in real life, here's Brian Halligan, HubSpot's CEO, talking about the personas we used when HubSpot was in its earliest stages:

Brian Halligan: When we were first starting HubSpot, we had different personas that were interested in HubSpot. One we called Owner Ollie, and Owner Ollie, it was a five-person company. Ollie didn't have any time to do any marketing, and he was just trying to deliver his product, let's say, and it was often times a services business. Then we had another persona called Mary Marketer, and Mary Marketer was a marketer in a, it's called 50, hundred-person, marketing organization, small marketing team, but she marketed all day long.

Both of these personas wanted very different things. Owner Ollie really just wanted HubSpot to do the darn marketing for him. Owner Ollie, if you wanted anything, wanted the world's simplest product. He didn't care about any analytics in the product. He wanted just, he wanted to do it for him, he wanted us to do it for him. Mary wanted very different things. She was kind of power-user. She was growing more technical and sophisticated over time. She wanted analytics, she wanted great email marketing, great social marketing, great everything, and she wanted it all tied together with great support.

Before Brian gets to the punchline, let me point something out really quick. Even though these Owner Ollie and Mary Marketer are personas, Brian constantly refers to them like real-life people. He knows their wants and needs. He talks about Ollie as if he's a friend and knows his problems and what solutions might be best for him. That's the key to buyer personas. Getting into the mindset of your potential customers.

Alright, back to Brian.

Brian Halligan: We were trying to serve both, and at some point in time, boy, we were trying to build products for both of them. The requirements for both were very difficult to solve at the same time. The more we tried to solve for both, the less we served either. At some point we said, "We're going to solve for Mary, the future is Mary. It's a company between five and let's call it 500 employees, with a small marketing staff, growing business, sales staff, they want to be a big company someday, let's equip them with the tools and the knowledge they need to really grow a modern go-to-market model.

That fed into, by making that decision, our product organization could really focus there, our sales organization could focus there, our marketing messaging could really focus there.

HubSpot's decision to focus specifically on a single persona marked a turning point in the company's growth. And it'll work for you, too, if you put in the effort to get your persona really nailed down. So commit now to define your personas and rally your entire company around them.

Video 2: How to create a buyer persona

Let's talk through how to create a persona that's robust enough to unify marketing, sales, and customer service. First we'll talk about who should create your persona, then we'll talk about how to go about creating it, and we'll finish off by talking about ways your persona can be used by all of your teams.

So first off, who's in charge of creating your personas? This is a job that often falls to the marketing team, and while it's fine for marketing to head up this initiative, they shouldn't be alone in this effort. The creation of your buyer personas should include input from as many different perspectives within your company as possible. Your marketing team should look at their performance metrics to understand who is most responsive to your product and positioning. Your sales team should look at past sales data to see what kinds of people are most likely to buy from you, and they should also share anecdotal information about what kinds of people are easiest to work with during the sales process. Your customer service team should share their insights into what kinds of people make the happiest, most loyal customers. In addition to these customer-facing teams, your back-office teams might also have important contributions to make. Perhaps finance can give you insights into what sorts of people are

most or least likely to fulfill their financial promises to your company. Legal might be able to point out certain kinds of people who tend to run afoul of your terms of service. And so on.

The point is, you will need to appoint somebody to own the project of creating and maintaining your buyer personas, and someone in marketing might be a great fit for that responsibility. But if your personas are based solely on input from marketing, they will almost certainly be deficient. The more viewpoints you can include in the persona creation process, the better the final personas will be.

So how do you go about creating your personas? First, you need to define the information that should be included, and then you need to identify the best sources for that information, and then you need to roll up your sleeves and get to work.

When it comes to defining the information your personas should include, you should start with your company's purpose. If you have a concrete understanding of the problem your company is meant to solve, that will form the foundation of your buyer persona. Once you know the problem people want you to solve, you can start brainstorming the broad categories of people who have that problem. You can start by having your customer service team identify any commonalities among your most successful customers. What traits are highly correlated with success using your product? Maybe there's one particular kind of person who sees a lot of success with your product; maybe there are several kinds of people who see a moderate amount of success; maybe some kinds of people are practically guaranteed to be dissatisfied with your product. Defining these categories of people will give you a rough idea of how many personas you're going to create.

Once you know that, you don't have to look any further than the roles of the people on your customer-facing teams to figure out what information you should include in your personas. Have marketing, sales, and customer service list out the questions they need answered in order to serve each persona.

For example, marketing will need to know things like how a given persona phrases their problem when they type it into Google. Marketing will also want to know where each persona goes to get help with their problem and what channels of communication they prefer to be contacted through. Demographic information can also be extremely helpful to a marketing team, so that they can ensure the content they create uses the right tone, is translated into the appropriate languages, and includes imagery of people who resemble the persona as closely as possible.

All of this information might be extremely helpful for marketing, but none of it will help sales much at all. The questions a salesperson might ask for each persona will be things like how high of a priority is overcoming this problem? What kinds of goals is this problem preventing the persona from achieving? Is this persona typically the only person involved in the purchasing decision, or will they have to get buy-in from other people before they can buy? How long or short do they expect the sales process to be? Do they typically view your product's price as being high, low, or about average?

In addition to these questions, your services team might have a completely different set of questions. For example, what needs to happen in order for this persona to feel satisfied after purchasing your product? What aspects of your product do they find most confusing? What are their favorite features of your product? What kinds of things will make them happy enough that they'll recommend your product to others? What kinds of things will upset them enough that they'll recommend that people not buy your product?

As you can see, when you bring marketing, sales, and services together, the list of questions that can be asked about each persona can get pretty long. But that's okay. Just get them all out, write them all down, and that'll give you a recipe for creating a fantastic buyer persona.

Once you have all of those questions outlined, you'll need to identify the best way to answer each of those questions. You have three main options here: looking at historical data, performing customer interviews, and making educated guesses. Try to answer as many questions as possible using data you already have. For example, you can look at the marketing data for your most and least popular content pieces and see if you can find patterns in what is or is not resonating. You can also look at sales data for patterns in people who are most or least likely to buy. And you can look at data about existing customers and see if there are any patterns in people who remain loyal or buy multiple times versus those who buy once and then disappear.

Once you've filled in as much of the persona as you can based on your data, it's time to start interviewing customers. Even if you're able to fill in your entire persona using data, it's important to talk to actual customers to make sure your interpretation of the data matches the real experiences of individual people. For each of your personas, you'll want to interview about 15 people. Using the questions your teams came up with as your guide, ask them how they found your company, what made them decide to buy from you, what positive and negative experiences there were along the way, and how you can improve the overall experience you've provided them. Take good notes during these interviews--record the interviews if you can--and then look for common themes that show up from one customer to the next. The things you learn from these interviews will add a level of depth to your personas that you won't be able to uncover any other way.

When you're done analyzing data and interviews, you should review your personas with colleagues from marketing, sales, and services. Are there any questions that marketing, sales, and services came up with at the beginning of the process that haven't been answered by the data and interviews? If so, it's time to pull together the collective wisdom of your customer-facing teams and make some educated guesses. Seek for consensus as much as possible, but if there are disagreements, that's okay. The first version of your personas will be a starting point. From there, you can experiment to find ways to verify or refute different pieces of information and improve them over time.

And that brings us to the final piece of buyer personas: how you use them. Your personas should inform everything your customer-facing teams do. Marketing should use them to create and position the content they make. Sales should use them as a benchmark for qualifying and understanding individual contacts. And services should use them to guide the efforts to provide your customers with the best possible experience using your product. Make sure there are ways for marketing, sales, and service to all give feedback so your personas can be improved over time.

With all of that said, please understand that personas don't replace the need to find out information about individual people. As your sales and services teams seek to build relationships with individual customers, they should remember that there will always be differences between your personas and actual people. The persona should act as a launch pad for the relationship, but once you get to know a person a bit more, rely on the data you have on that person over the information in your persona.

It's important to keep in mind that the work of creating personas is never done. Even if you get your personas into an optimal state, people change as time goes by. A few years from now, when new communication channels have changed the way people learn about your product and new competitors have entered your market and your product has matured and your customer base has grown, your personas will need to be updated. If you're

constantly getting feedback from your teams, your existing personas should gradually change to match the changes in the people it represents. But it could be that an entirely new category of people are now interested in your product, and you'll need to create a brand new persona to represent them. But by using the steps we've already outlined, you'll be able to create that persona and stay ahead of the curve. And that's a big part of what it means to grow better.