Getting To Better Personas

Getting the most value out of both distributed content and your owned media strategy.

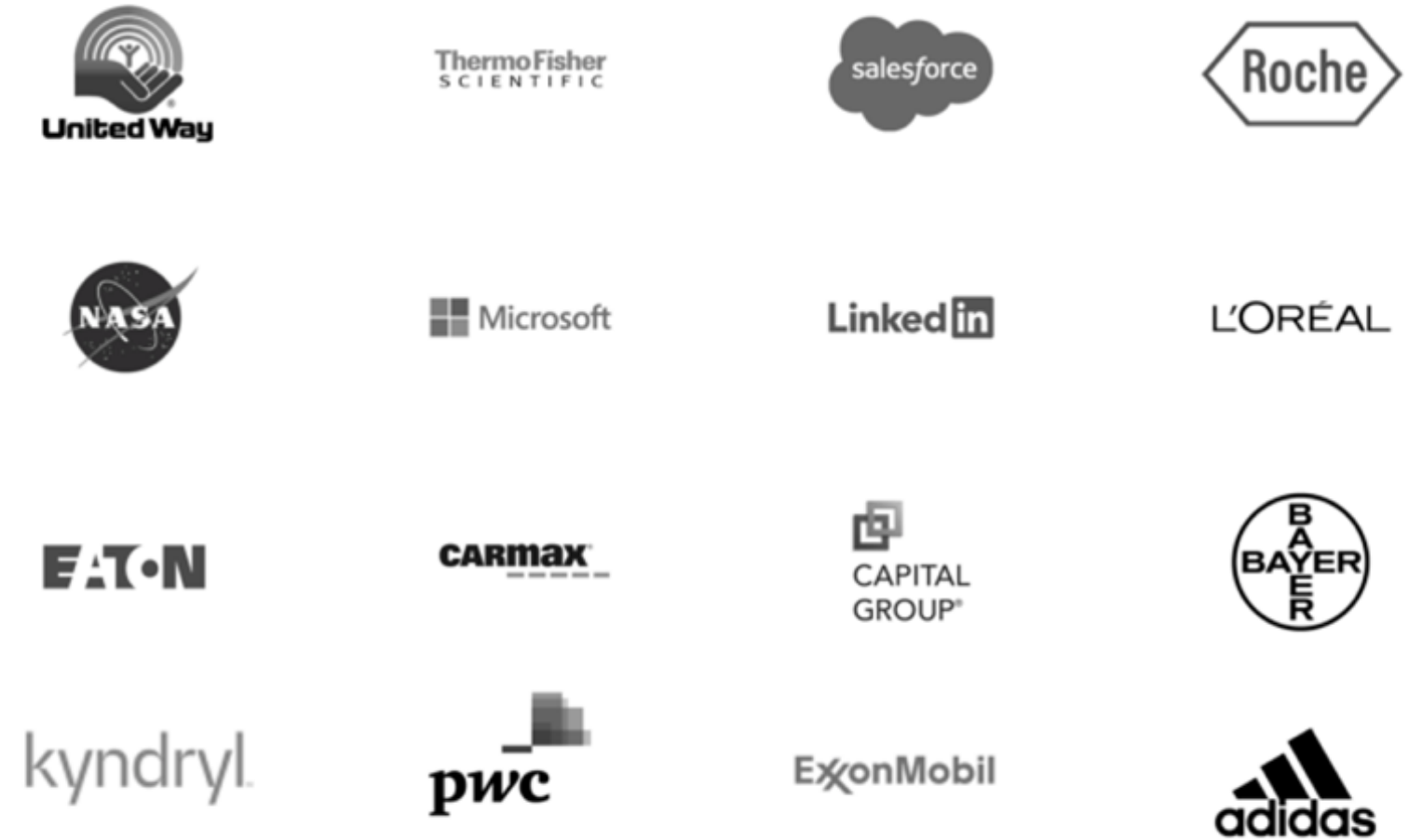TCA Webinar

Your Hosts

Robert Rose
Chief Strategy Officer
Author, Speaker, Troublemaker

Cathy McKnight
Chief Problem Solver
Advisor, Speaker, Explorer

WE WORK WITH GREAT COMPANIES

United Way
Thermo Fisher SCIENTIFIC
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CARMAX
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kyndryl
pwc
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adidas

What we're going talk about today

- ❑   Why Customer Personas Matter

- ❑   Building Personas That Actually Work

- ❑   Matching Content to the Customer Journey

- ❑   Turning Engagement into Conversions

And we have a Special Guest

REMEMBER
ALL AUDIENCES ARE CUSTOMERS

BUT ONLY SOME CUSTOMERS BUY OUR PRODUCTS

Power of Personas

Companies with well-defined customer personas see a **171% increase in marketing-generated revenue** compared to those that do not.

*

82% of companies that use personas say they have **improved their value propositions and messaging**.

**

93% of businesses that exceed their lead and revenue goals attribute their success to segmentation and persona-based marketing
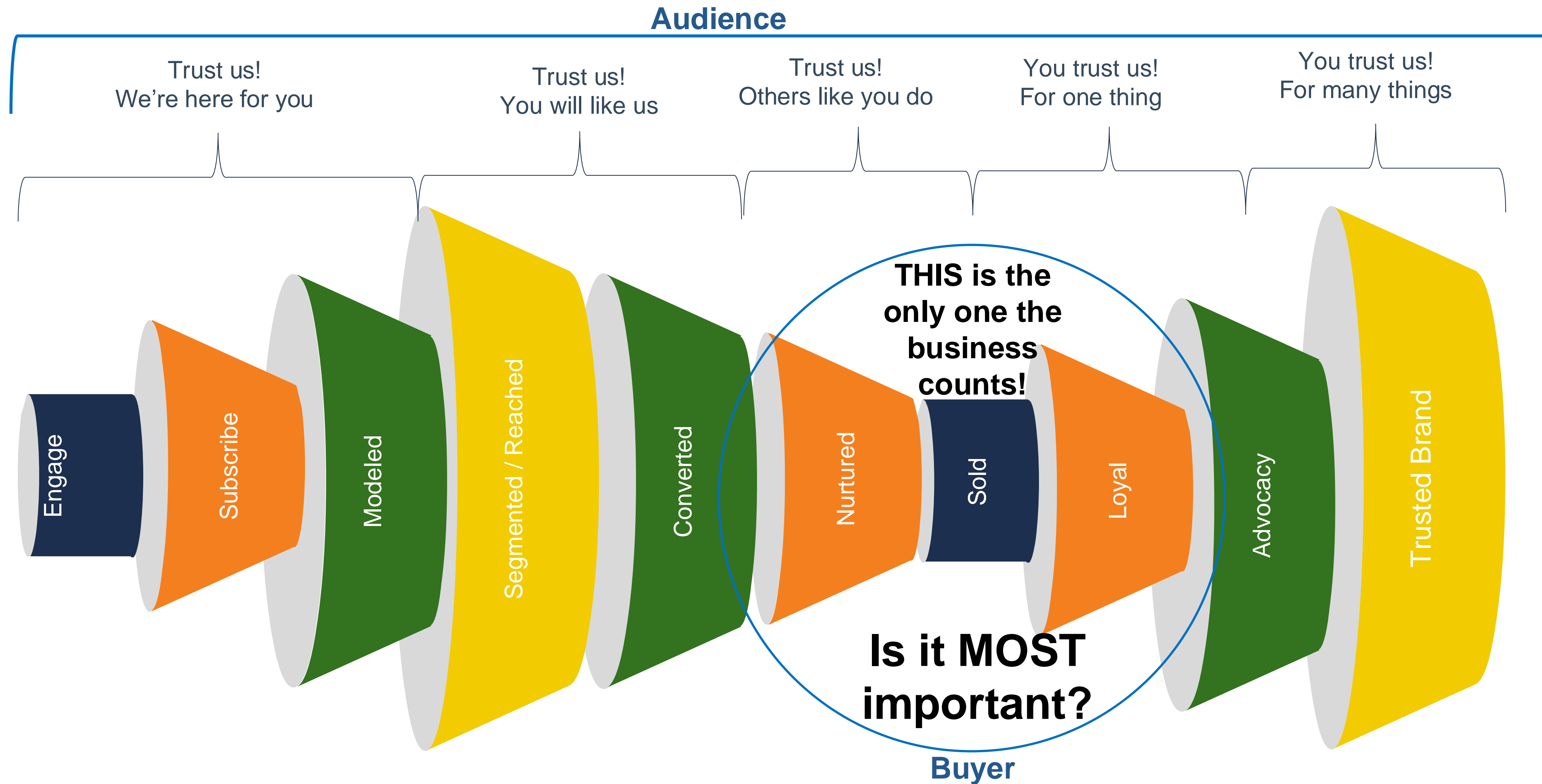
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* Source: CinteI

** Source: ITSMA

Personas: A starting point for all great experiences

Personas help …

Personas help to keep EVERYONE – from designers to channel experts to sales teams – focused on what the target audience wants and needs.

We integrate content across the ENTIRE journey

Audience

Trust us!
We're here for you

Trust us!
You will like us

Trust us!
Others like you do

You trust us!
For one thing

You trust us!
For many things

Engage · Subscribe · Modeled · Segmented / Reached · Converted · Nurtured · Sold · Loyal · Advocacy · Trusted Brand

THIS is the only one the business counts!

Is it MOST important?

Buyer

Audiences are More than Buyers

Mapped experiences that have clear purpose, focus, and goals

Buyer personas are useful – for the stage of the customer's journey where they are… you know… Buying something.

Companies often develop buyer's personas looking only through the lens of our brand, our product, and how they acquire

Kelly

The "On-The-Go" Parent

Motivations

Detail-oriented
Cares deeply about education
Loves to travel, eat, tour, etc.

Lifestyle

Works in career and manages family – the family CEO/CFO

Pain points / challenges

Time savings. She's unable to keep up. Frustrated with all her lists. Wants mobile integration with her tasks, schedules, and to-do lists.

"I really wish I had an app on my phone that would let me automatically organize everything in one place. And let me do it in a way that I want."

Personas are more than data points & stock photos

True personas focus on **motivations, goals, challenges, behavioural traits, and preferences**—factors that directly inform effective content and messaging strategies.

Robust personas have:
- **Demographic details**: Age, marital status, income
- **Personal details**: Name, short biography, photograph
- **Attitudinal and/or cognitive details:** mental model, pain points, feelings about the tasks that need to be accomplished
- **Goals and motivations** for using the product
- **Behavioral details:** how the persona acts when using the product

When building a persona:

Consider:

- Behaviours
- Attitudes
- Jobs To Be Done
- Roles
- Tasks
- Channels used
- Devices used
- Challenges
- Access environments/location
- Physical or technical limitations
- Motivations
- Goals
- Demographic data

Then look for commonalities:

- Type of person
- Goals
- Personal motivations
- Locations
- Levels of savviness on topic/brand/…
- Common tasks
- Frequently used applications
- Frequently referenced information
- Barriers to successful journey
- Physical work environment conditions
- Familiarity with the organization

Jobs to be done (**JTBD**) refers to a business theory, framework, and perspective on why customers buy products or services. Focusing on the user problems and needs, and the outcomes they desire.

Building Audience Personas – 5 Steps to Success
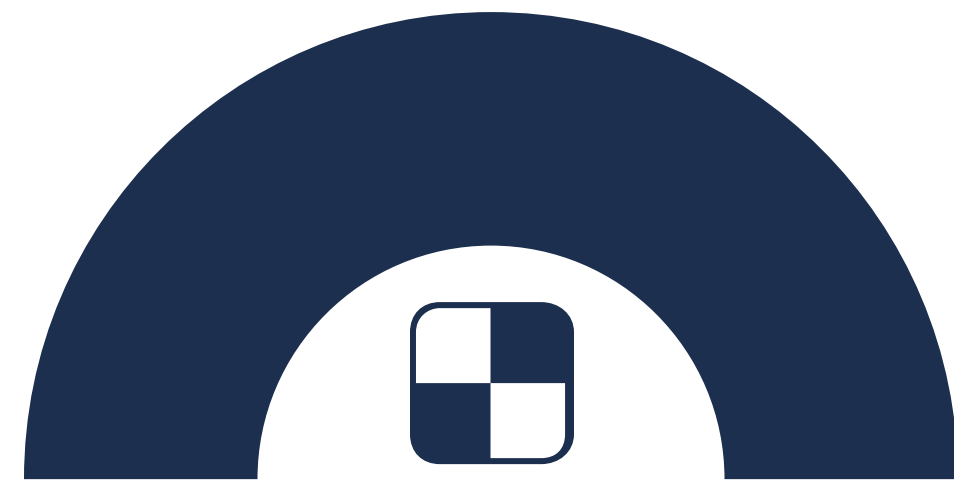
1. DEFINE
Define your "minimum viable audience"

2. DISCOVER
Go out and discover your audience

3. DESIGN
Map challenges in context to audiences' journey
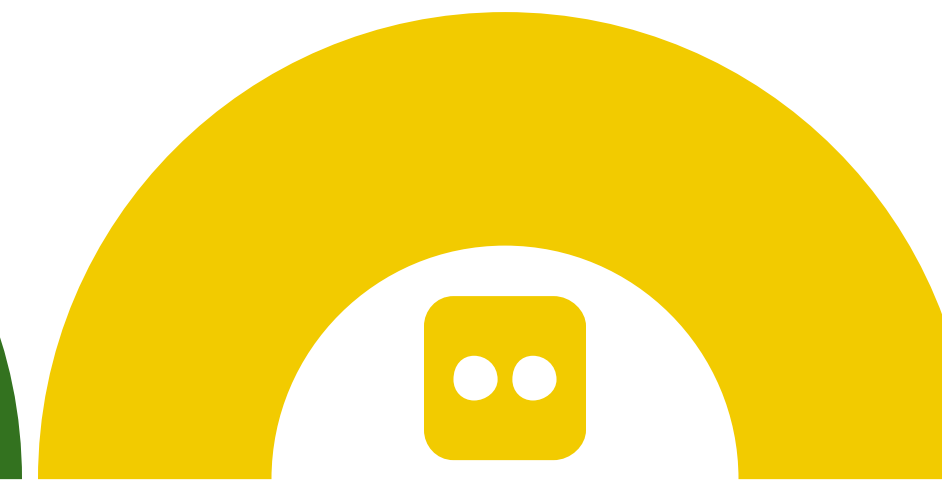
4. DECIDE
Align and prioritize the JTBD against business goals
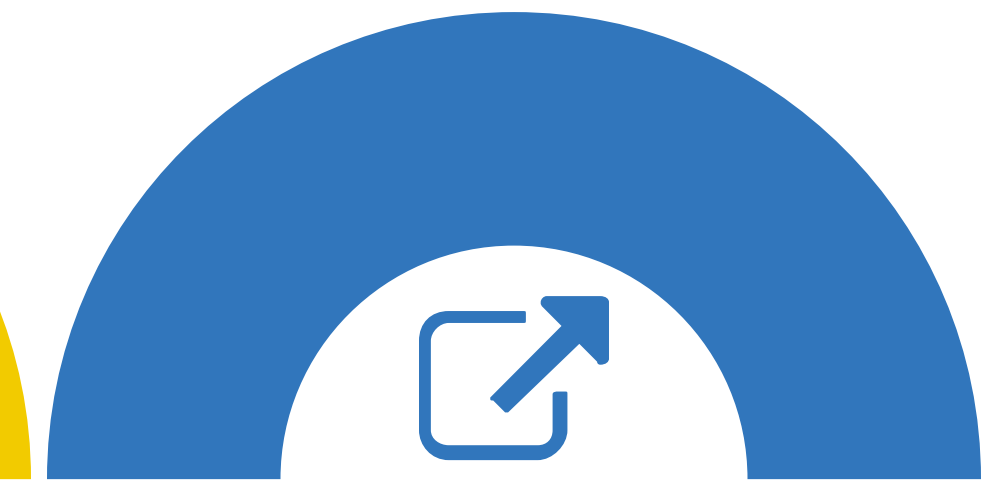
5. DRAFT
Validate your research with success statements

Step 1: Define Your Audience

Find Out

Collect data: Who are they? How many are there? Where are they?
What is your total addressable audience?

via

- Media kits from magazines
- Professional associations, paid services
- Census
- Internal Data

Ask

Who are they as people, not buyers?
Open-ended questions to explore challenges.

via

- Interviews
- Data
- Customer advisory boards
- Online surveys

Observe

People in their natural habitat. What needs?
What are their contextual wants?
What are the "so I cans"** – the jobs to be done?

via

- Persona research
- Research firms
- Google searches
- Focus groups

Be

Empathic for your audience – "walk a mile"
Them - do what they are attempting to do

via

- Experiment
- Original research

** I want … so that I can … <goal, wish, …>

Example of a Defined Audience

The Capital Group

Find Out

From research of 285,000 financial advisors in the United States

- 20%-25% are certified
- Total addressable audience is then: 70,000
- Minimum viable audience: 7,000 (a 10% penetration)

Ask

Hired company to interview 50 of them. Covered topics from work/life balance to future of their career, industry, etc.

Observe

- Attended competitor events.
- Watched traffic and Google trends.

Be

Spent time with the target audience and learned about lack of time to relax and the challenge of learning in today's environment.

Step 2: Discover Audiences' full story, not just how they buy.

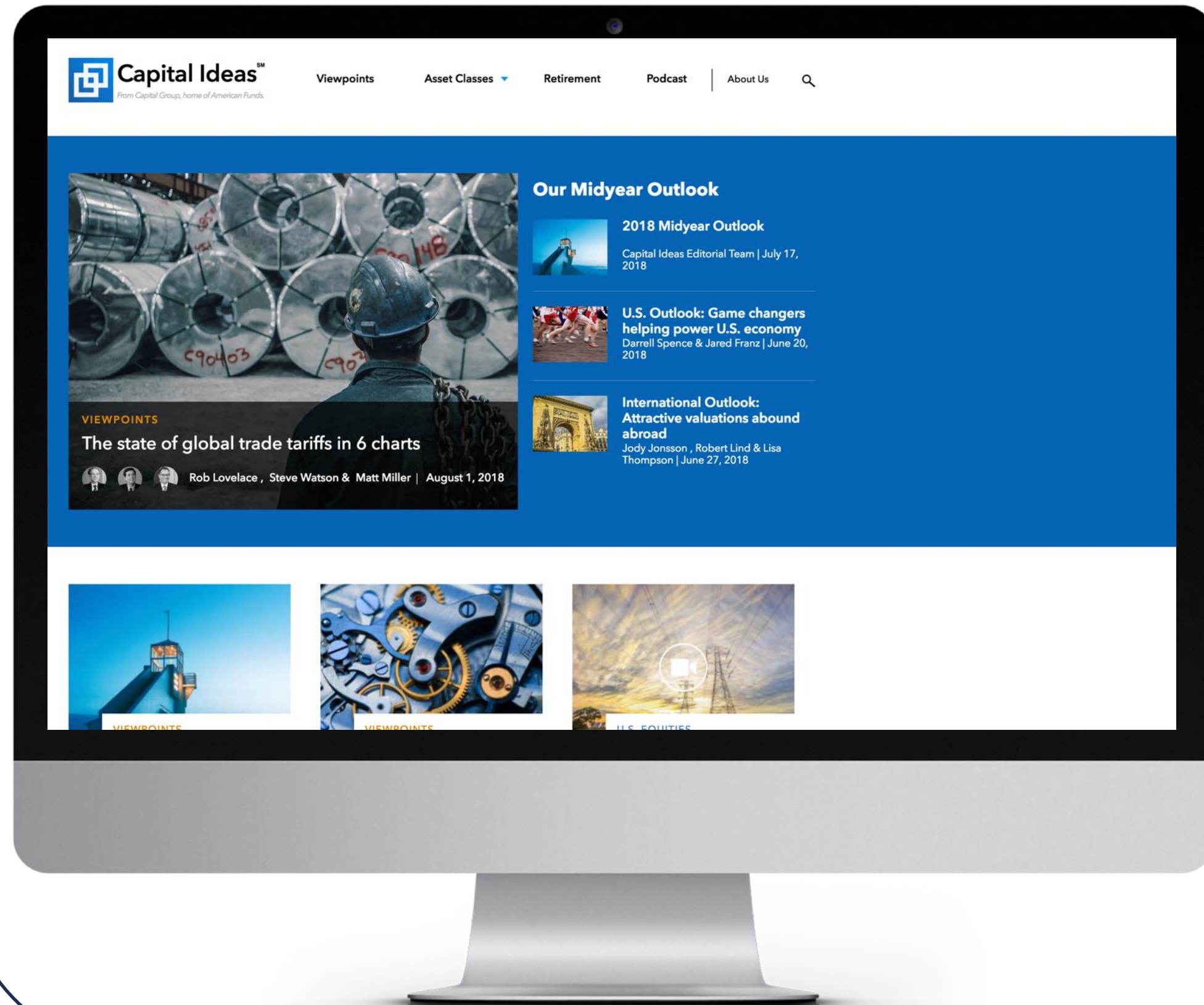| **Stories** | Map their stories to a journey. How do they discover, try, learn? Listen for the "so I can" for what they want. | via | ▪ Listen for the "once upon a time" ▪ "Every day… Then one day… and I …" |
Context	Track the emotional and social context of the stories that you're hearing or observing. How did they feel? What were they thinking.	via	▪ Hear the needs. ▪ Pay attention to the social and emotional wants: "happy," "frustrated," "peer pressure," etc.
Search	Map the emotional and social context of the stories into their journey.	via	▪ How do they find answers today? ▪ Are they even looking for answers?
What's Missing	What is the job NOT done?	via	▪ Finding where we can solve a job to be done that isn't currently being solved at all?

tca THE CONTENT ADVISORY

Jessica Rhodes
SAMPLE JOURNEY MAP

A teacher of ten years, she doesn't have/make time to research their retirement/investment options and aren't interested in making personal finance decisions right now. They need someone to provide sound advice.

FINANCIAL KNOWLEDGE — Low / High
AWARENESS — Low / High
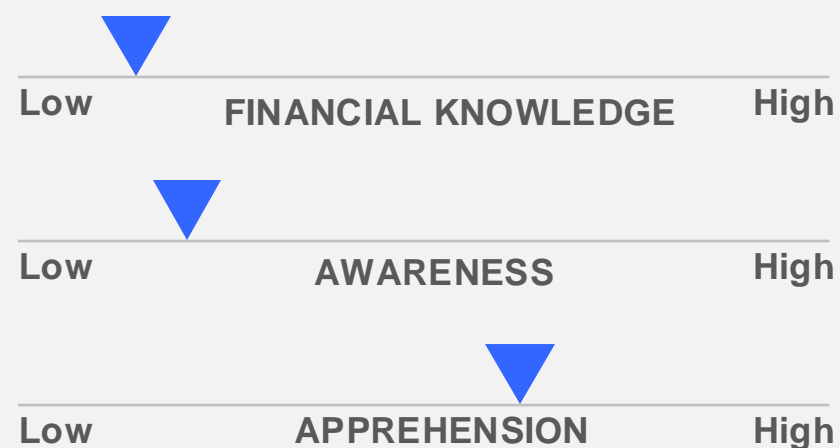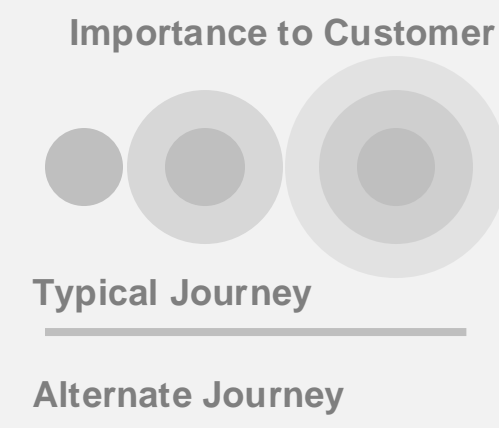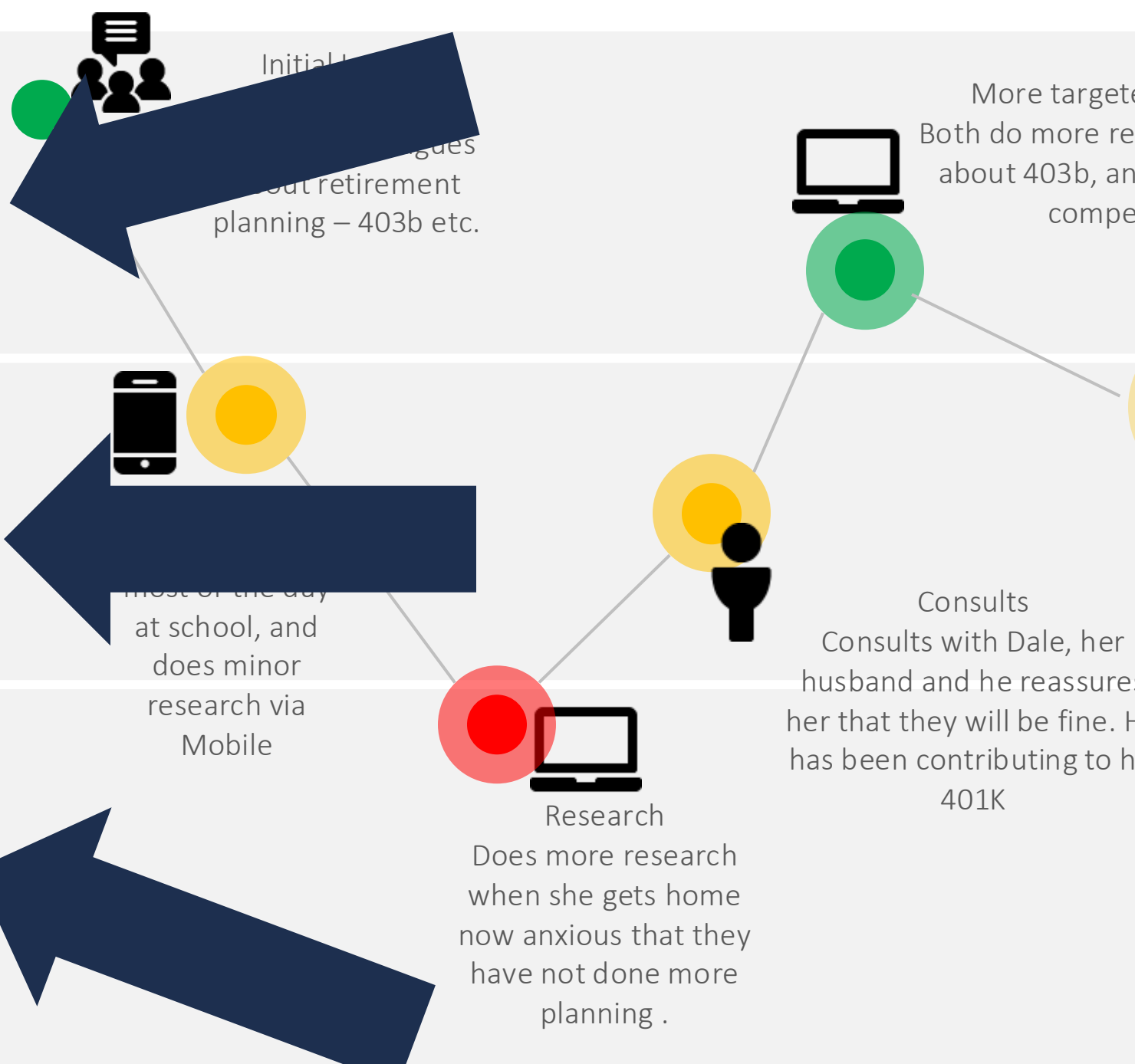APPREHENSION — Low / High

"I have a pension, so we are already half way covered. I'd like to talk to someone to get an idea of when we should start planning for the future."

Importance to Customer
Typical Journey
Alternate Journey

NEEDS & EXPECTATIONS

PHASE 1 – Discovery of Need
- Support from her school board administrator to understand what she current has, and what other options are available.
- Retirement investment/savings options specific for teachers.
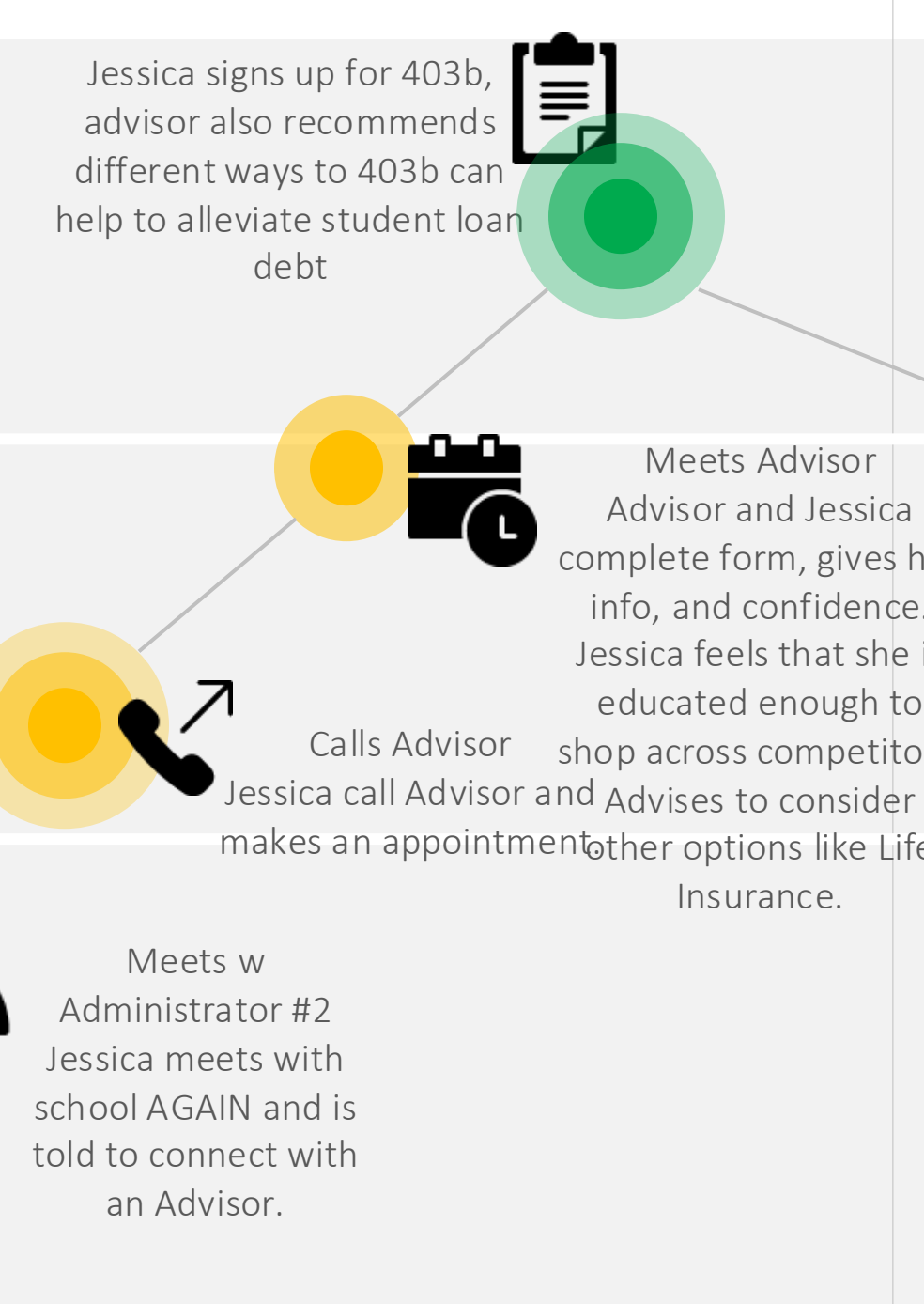
PHASE 2 – Awareness
- Advisor to have specific knowledge of teacher retirement benefits and best-fit options from CLIENT portfolio of options to complement what she has.
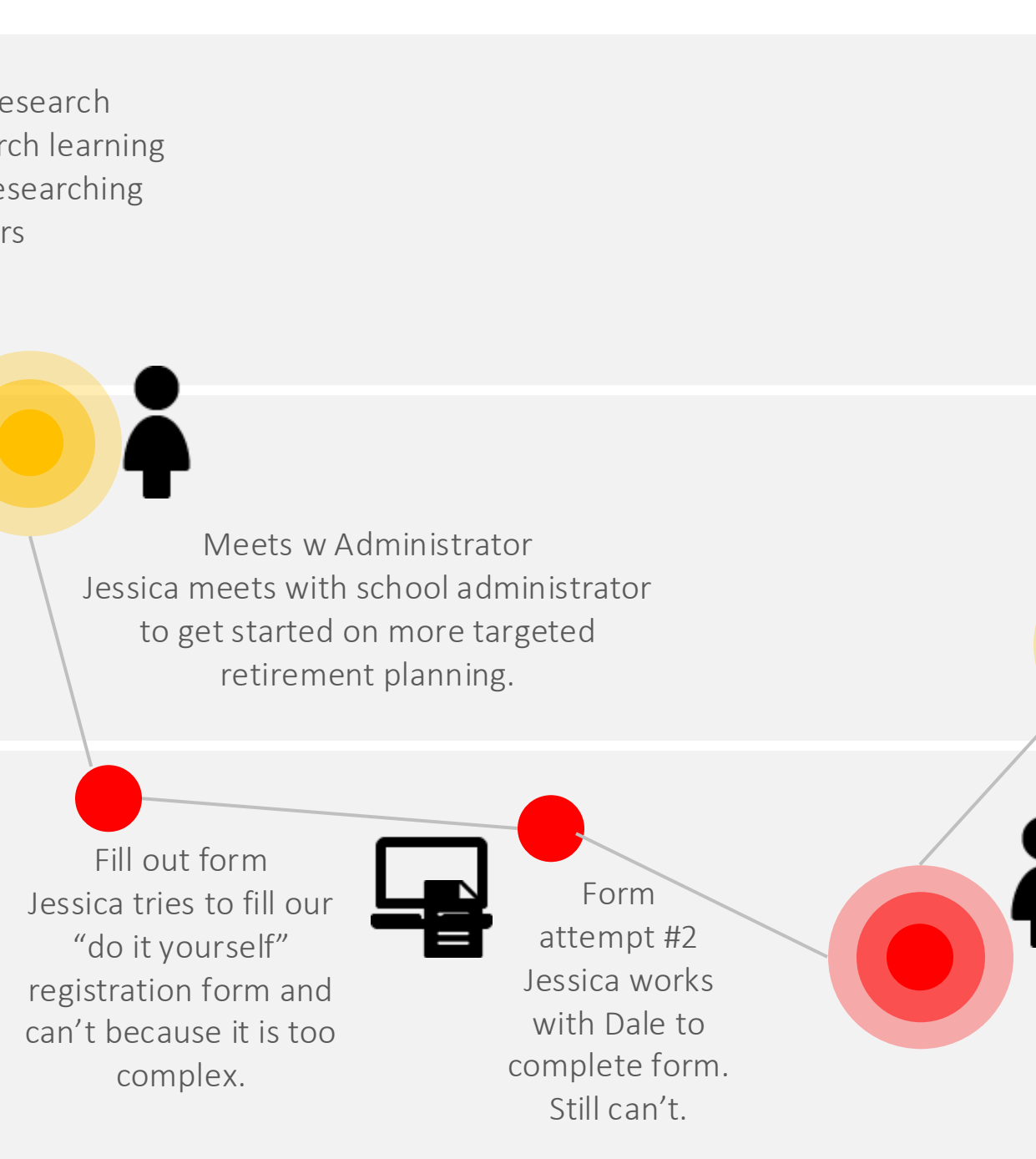
PHASE 3 – Information Gathering
- Information to be delivered to her proactively.
- Content which she identifies herself.

PHASE 4 – Decisioning
- Regular check-ins from Advisor.
- Pro-active suggestions for changes or new investment/saving opportunities that suit her.

Initial
colleagues
about retirement
planning – 403b etc.

More targeted research
Both do more research learning about 403b, and researching competitors

Jessica signs up for 403b, advisor also recommends different ways to 403b can help to alleviate student loan debt

Follow up.
Advisor follows up within a week sets up time for 2nd meeting.

most of the day
at school, and
does minor
research via
Mobile

Meets w Administrator
Jessica meets with school administrator to get started on more targeted retirement planning.

Meets Advisor
Advisor and Jessica complete form, gives her info, and confidence. Jessica feels that she is educated enough to shop across competitors. Advises to consider other options like Life Insurance.

Jessica/Dale meets with Advisor, agree it's best to max out 401k before purchasing life insurance

Calls Advisor
Jessica call Advisor and makes an appointment

Advanced Research
Jessica/Dale does more research. Talk to Friends/Families. Look at competitors. Considering different options/competitors

Consults
Consults with Dale, her husband and he reassures her that they will be fine. He has been contributing to his 401K

Research
Does more research when she gets home now anxious that they have not done more planning .

Fill out form
Jessica tries to fill our "do it yourself" registration form and can't because it is too complex.

Form attempt #2
Jessica works with Dale to complete form. Still can't.

Meets w Administrator #2
Jessica meets with school AGAIN and is told to connect with an Advisor.

CONTENT & TOOLS

- *Savings Calculators: retirement, tuition, mortgage*
- *Pension Calculators*
- *Links to teacher-specific resources*

- *Case studies*
- *Infographics*
- *Short articles/blog posts: retirement, savings, etc.*
- *Aspirational content*
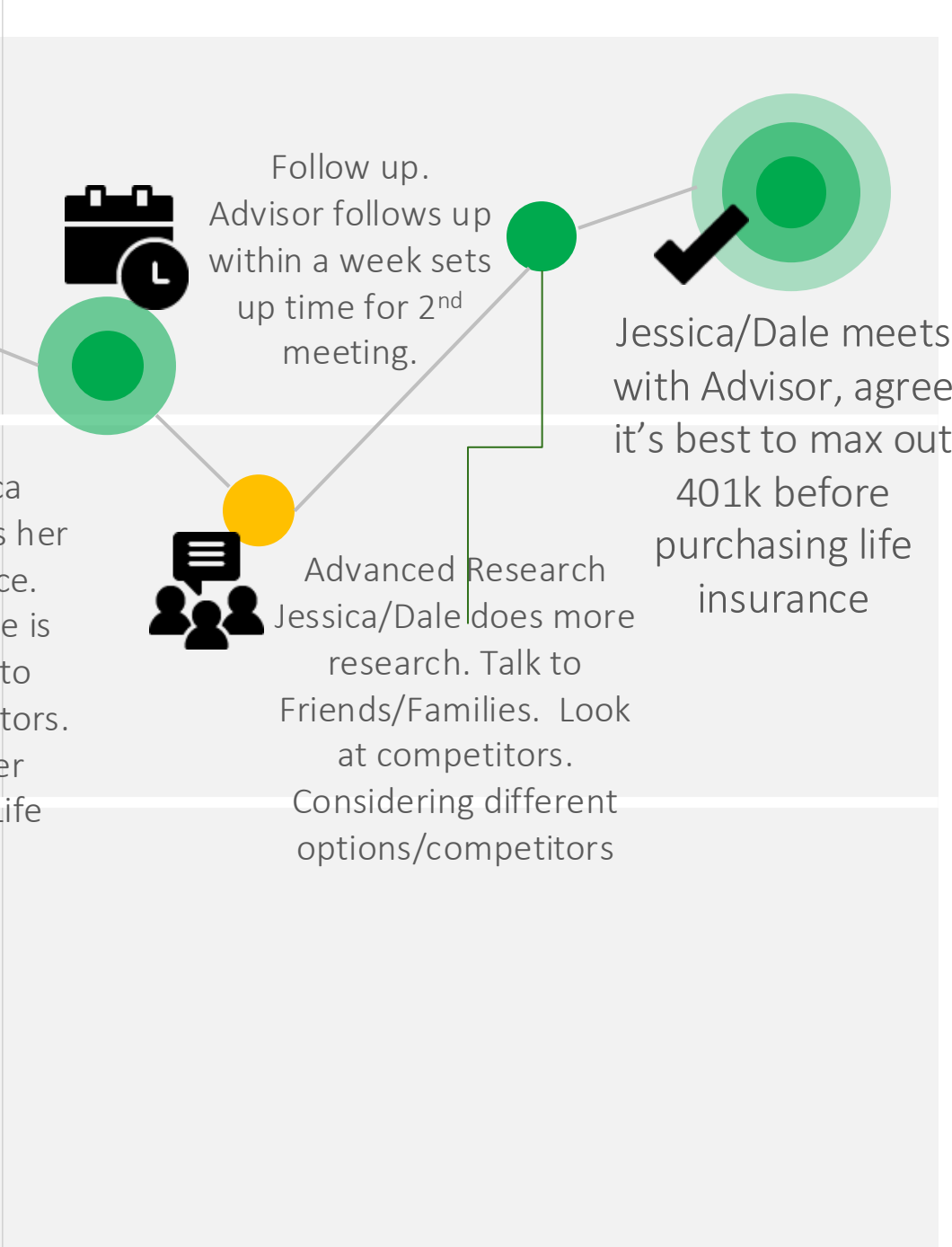- *Impact content: "How saving $5/day can make all the difference"*

- *Savings Calculators*
- *Pension Calculators*
- *Teacher specific resources*
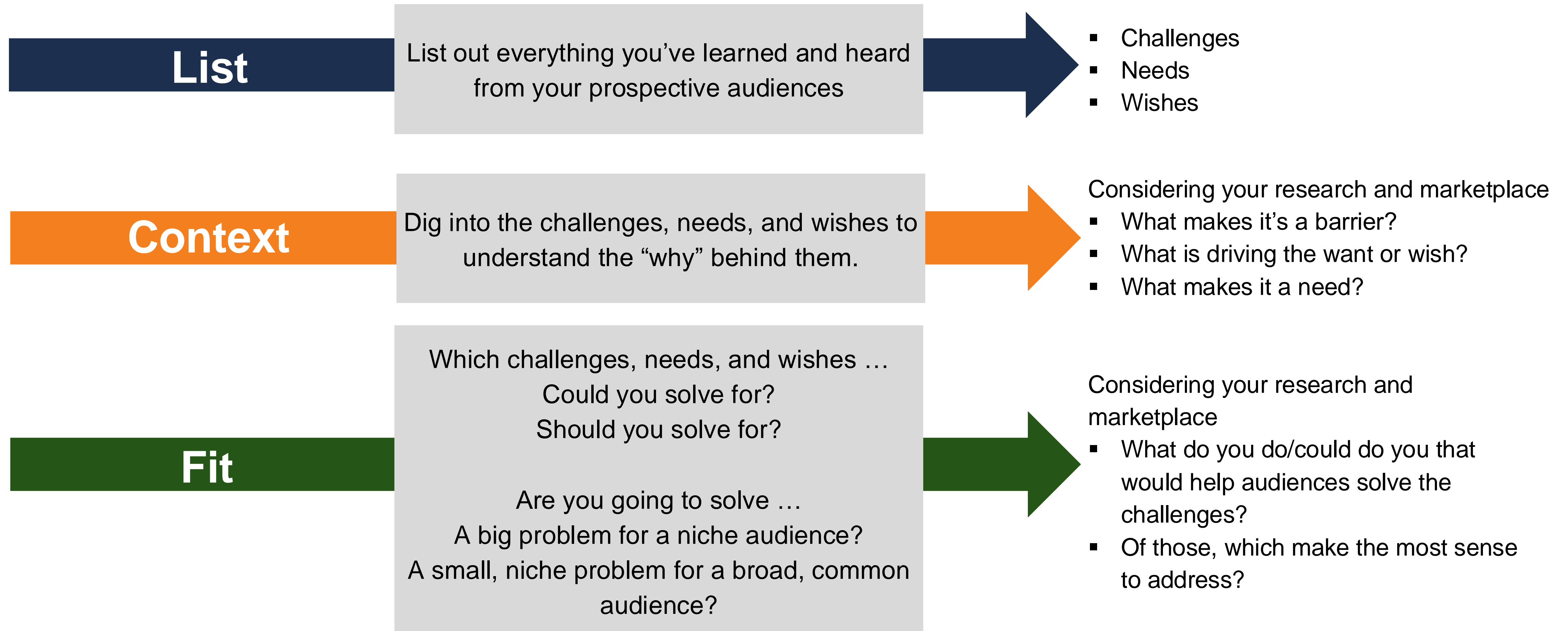- *Teacher specific events*

- *Short articles/blog posts: retirement, savings, etc.*
- *Aspirational content*
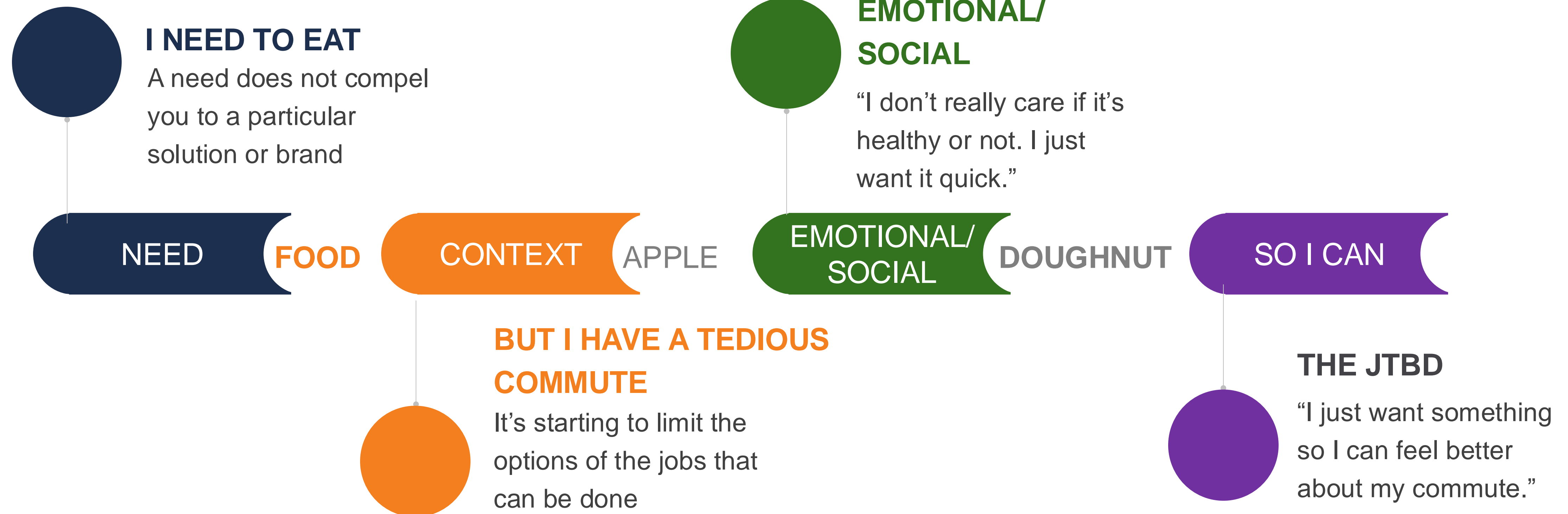- *Impact content*

THE CONTENT ADVISORY

Step 3: Design the Jobs to be Solved

Defining the "Jobs to be Done" (JTBD) focuses on the direct outcome a customer wants to achieve with your product. Personas help explain how the audience would go about reaching that goal.

List — List out everything you've learned and heard from your prospective audiences →
- Challenges
- Needs
- Wishes

Context — Dig into the challenges, needs, and wishes to understand the "why" behind them. →
Considering your research and marketplace
- What makes it's a barrier?
- What is driving the want or wish?
- What makes it a need?

Fit — Which challenges, needs, and wishes …
Could you solve for?
Should you solve for?

Are you going to solve …
A big problem for a niche audience?
A small, niche problem for a broad, common audience? →
Considering your research and marketplace
- What do you do/could do you that would help audiences solve the challenges?
- Of those, which make the most sense to address?

Step 3 – Find the "So I Can"

"When I'm rushing to work, and I'm starting my long commute and I have no time to stop. But I'm hungry and just want something to eat that is quick, easy, and that tastes good. I want to find something I can have so I feel better about my commute."

I NEED TO EAT
A need does not compel you to a particular solution or brand

EMOTIONAL/ SOCIAL
"I don't really care if it's healthy or not. I just want it quick."

| NEED | FOOD | CONTEXT | APPLE | EMOTIONAL/ SOCIAL | DOUGHNUT | SO I CAN |

BUT I HAVE A TEDIOUS COMMUTE
It's starting to limit the options of the jobs that can be done

THE JTBD
"I just want something so I can feel better about my commute."

Example of Jobs to be Solve

Lincoln Electric

List

Interviewed artists and makers and specifically focused on wood working sculptors. Discovered that 80% of them wanted to get into welding but were afraid of how dangerous it was.
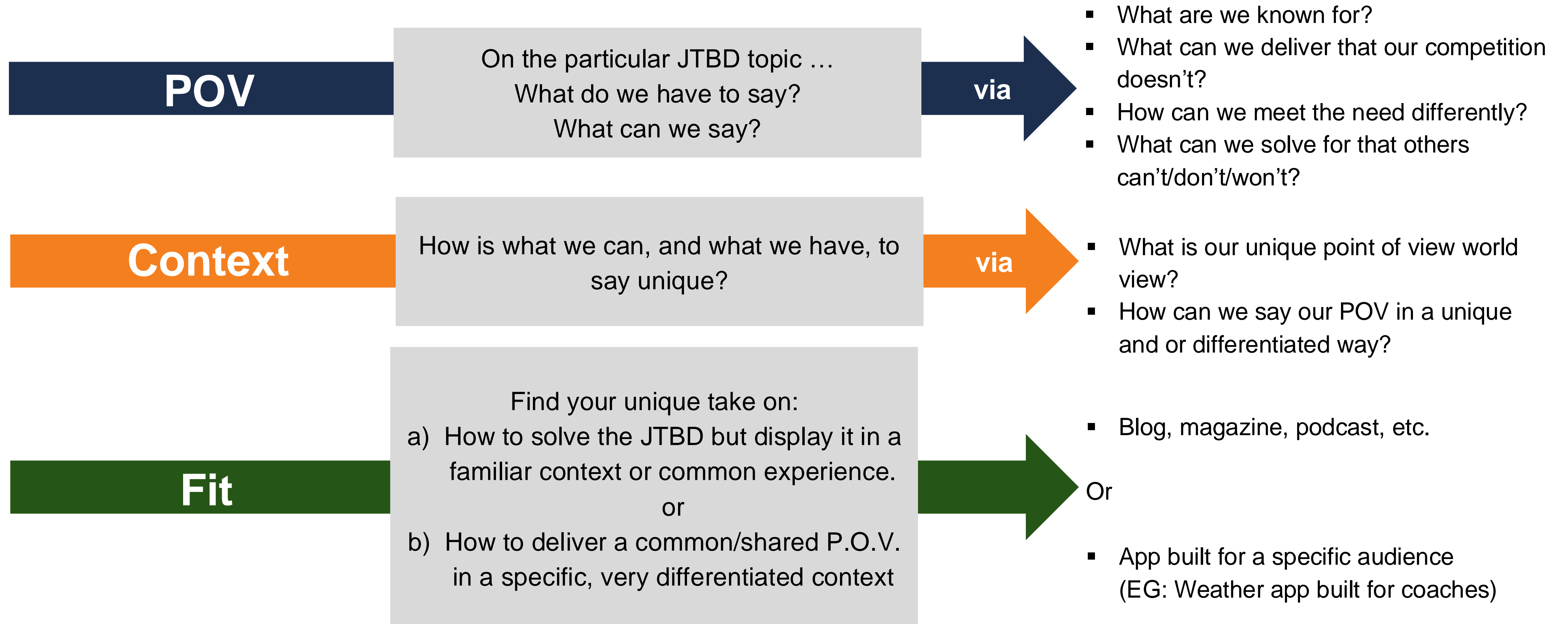
Context

They really wanted to learn but didn't want to be in the same "classes" as those who were looking to it as a career. Afraid of being mocked.
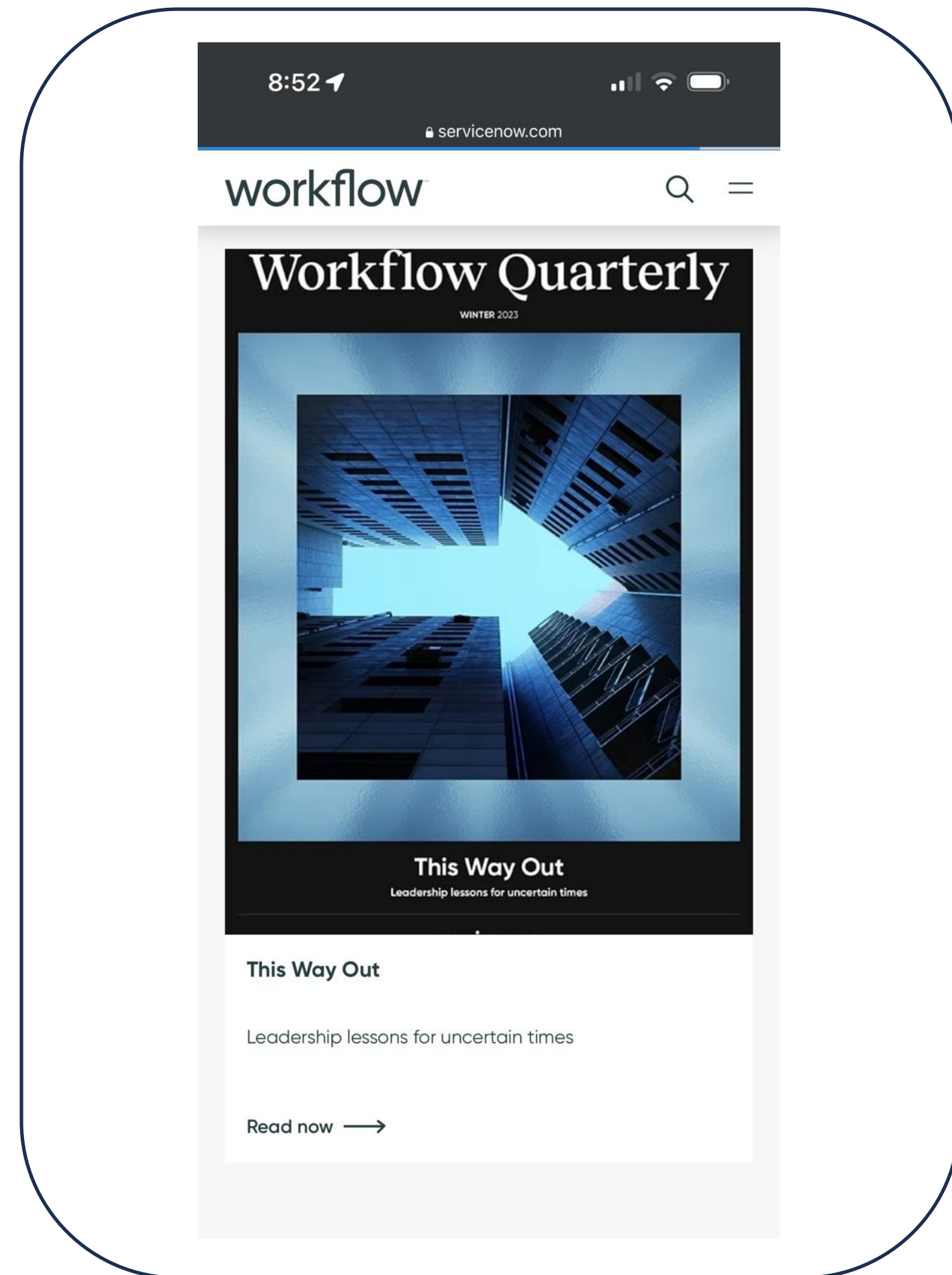
Fit with what they heard from artists

"I wish there was a way I could learn about welding that didn't make me feel dumb, and that could show me the way. I want to get into welding but I'm afraid it's just too hard and complex. I want to learn on my own time, so I can create some really cool new pieces of art."

Step 4: Decide

POV

On the particular JTBD topic …
What do we have to say?
What can we say?

via

- What are we known for?
- What can we deliver that our competition doesn't?
- How can we meet the need differently?
- What can we solve for that others can't/don't/won't?

Context

How is what we can, and what we have, to say unique?

via

- What is our unique point of view world view?
- How can we say our POV in a unique and or differentiated way?

Fit

Find your unique take on:
a) How to solve the JTBD but display it in a familiar context or common experience.
or
b) How to deliver a common/shared P.O.V. in a specific, very differentiated context

- Blog, magazine, podcast, etc.

Or

- App built for a specific audience (EG: Weather app built for coaches)

Example of Deciding on the JTBD

Service Now Finds their Unique POV

ServiceNow

Mid-sized software company focused on providing technology platforms for workflow and project management

Workflow Magazine

A publication to help C-Level audiences learn (through thought leadership about workflow)

Editor's Stated Strategy

"Cover technology in the service of people rather than the other way around." **They chose a NICHE topic – through a VERY common interface.**

Step 5: Draft

Validate

Get ready to write the success statements for the problem you are solving. Validate and identify specifics of the value.

- Review data
- Do more targeted interviews
- Listen for keywords, messages, and opportunities.

Map

Map the value, key words, outcomes to build your success statement.

Value Action + Success metric + Job Action + Clarifying Context/Emotion

Write

Success Statement

Value action

Success metric

When. I am working, I don't need more software, I need automation, research tools and help that gives me the freedom to work on my business. I want peace of mind so I can feel better about spending time working on building the law practice of the future.

Job action

Success metric

Clarifying context

Success Statements to Content Architecture

Value Action + Success metric + Job Action + Clarifying Context/Emotion

Baseline for your content architecture			
Value	Success Metrics	Job Actions	Clarifying Context/Emotions
Learn welding	Easy	Formal classes	Embarrassed – beginner
Build cool art	Less time-consuming	Tutors/mentors	Speak my language
Meet artist/welders	Fun/inspiring	Events	Know me
Learn specific welds	Virtual	Downloadable	Want to have fun, joyful
Mix mediums	Inexpensive	Updated	Safe

Building Audience Personas – 5 Steps to Success
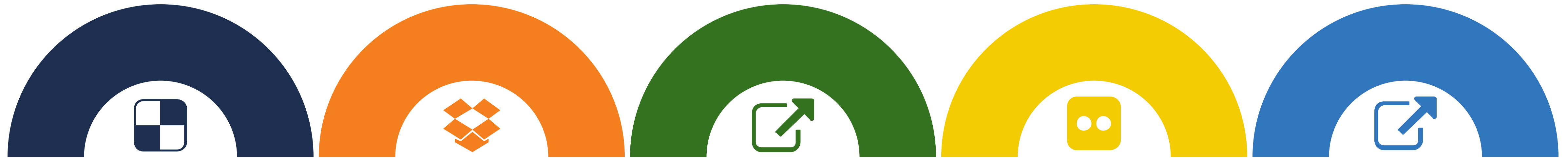
1. DEFINE

Define your "minimum viable audience"

i. Define the total addressable audience
ii. Go deep into the details.
iii. Narrow down segments to define your "sweet spot" profile.

2. DISCOVER

Go out and discover your audience

i. Uncover as many *Jobs to be Done* (JTBD) as you can.
ii. Document the JTBD challenges.
iii. Dig deep to understand your audience as people, not buyers.

3. DESIGN

Map challenges in context to audiences' journey

i. Decide on the "right" jobs for you to solve.
ii. Map how you meet the need in context with their journey.
iii. Design the JTBD against your capabilities.

4. DECIDE

Align and prioritize the JTBD against business goals

i. Make decisions about the "right" jobs for you to solve.
ii. Decide how to tell the story of how you can solve the problem.

5. DRAFT

Validate your research with success statements

i. Write success statements.
ii. Build a high-level editorial or content strategy based on delivering against the success statements.

Our Special Guest

Susan Baier

Founder & CEO of Audience Audit Inc.

www.audienceaudit.com

- Professional Speaker
- Badass Researcher
- Thought Leadership Strategist

Susan likes to camp, knit, and enjoys a good bourbon… sometimes simultaneously.

Best quote: "Yah, we don't do that."

Big things coming in 2025

Seventh Bear

Next Online Event: January 23, 2025

Teamwork: Unlocking the Magic of Collaboration

Are you ready to discover the power of being part of a well-structured, collaborative team?

We'll share the wisdom we've garnered working with hundreds of teams on how aligned teamwork transforms creativity, streamlines processes, and drives success. Say goodbye to the cacophony of unconnected teams, or worse, the static of their silence, while we share practical strategies to boost collaboration, align goals, and amplify impact.

Join us and learn about:

- **The Collaboration Edge**: Learn how structured teamwork sparks creativity, speeds up workflows, and enhances marketing results.

- **Role Clarity = Big Wins**: Discover how clear roles and shared accountability create alignment and reduce friction.

- **How to Harmonize across Silos**: Get actionable strategies to build a cohesive, high-performing teams that deliver big results.

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