



Customer Persona Template

Get to know your ideal and not-so-ideal customers.

The Right Foundation

Building an effective brand, marketing, or sales strategy starts with a simple question:

Whom are we trying to attract?

Your ideal customers should be the core of your business — meaning, every decision you make, every tactic you use, every person you hire, every service you offer should first be informed by what will best help your ideal customers.

You can't build a profitable business without a deep understanding of whom you serve.

Customer personas

One of the tools that will help you gain a deeper understanding of your ideal customers is to create a customer persona.

Simply put, a customer persona is a fictional representation of your ideal customer.

Think of it as a character — a person who best represents the personality, demographics, beliefs and values of your ideal customers in a way that allows you to easily create content, marketing campaigns, and branding messages.

Ideally, you want to create a minimum of 2 personas:

- Ideal persona
- Negative persona

Both are needed to get a better view of whom to attract.

Ideal persona

An ideal persona is just that — the persona of your ideal customer, the person you want to attract.

You should create a persona for each niche, decision maker, or industry you play in.

Let me give you an example of what I mean. Let's say your sales cycle often includes getting buy in from the CEO and COO, but your first point of contact is the CMO.

Each one of those decision makers will have different values, different pain points, and different motivations that drive their decisions. Meaning, it would benefit you to have a separate persona for each one.



Negative persona

A negative persona is the opposite of a customer persona.

Whereas a customer persona is a representation of your ideal customer, a negative persona is a representation of your not-so-ideal customer.

Think of it as the *I never want to work with this kind of customer* persona.

Negative personas help you recognize red flags in the sales cycle when you may likely be focused on potential revenue and not see the signs flashing before you.

Typically, you only need one (1) negative persona.

Ideal Customers, Defined.

Before you jump into creating your personas, let's define the phrase "ideal customer".

Many people use ideal customer and target market interchangeably, but they aren't exactly the same thing.

- An ideal customer is the customer you WANT to work with.
- A target market is any customer you COULD work with.

This means you should have some criteria for what constitutes an ideal customer, things like:

- Pay on time
- Trust you
- Don't micromanage
- Personalities mesh
- Refer others to you
- Respond quickly
- Shorter sales cycle
- Willing to do the work

Take some time and jot down a few criteria for YOUR ideal customers:

Keep those criteria in mind as you create your customer personas.



Creating Your Personas

Creating your personas involves a 3 step process:

1. Document what you know.

You likely already know a good deal about your ideal customers.

Through discovery calls, proposals, interacting on social media, fulfilling client contracts, or just your own experience in the industry, you've gained valid insights and observations about your ideal customers.

Don't ignore them! Start by filling out the templates on the following pages with those insights.

2. Validate through research and interviews.

Next, it's time to validate your existing insights and fill in the gaps with research and interviews

Here are a few places to start:

- Look for trends in your current customer base
- Ask your sales team for insights gathered in discovery calls
- Review the analytics on your website
- Sit in on discovery calls and proposal reviews
- Observe what your ideal customers engage with on social media

Once you've done some observational research, step it up a notch and schedule some interviews.

We recommend talking to 3-5 customers you would consider ideal.

3. Adjust your personas

Once you've researched and interviewed your ideal customers, it's time to go back to your customer personas and make adjustments.

- Correct any assumptions that were wrong
- Add in information that was missing
- Make notes about any key attributes that could be useful in marketing

Remember — a customer persona is only as good as the data in it. Take the time to adjust the information you have so it's as accurate as possible.



Persona Templates

Use the templates on the next few pages to build out your customer and negative personas.

You can either print them out and fill them in by hand, or use the provided fields to type out your answers and print them out completed.

As I mentioned before, we recommend creating a customer persona for each decision maker, industry, or niche that you target, especially if there are major differences in their demographics, psychographics, personalities or even in the solutions they need.

Once completed, use them when crafting content, creating marketing campaigns, or sending sales emails to prospective clients. The insights will help you tailor your messaging to what they need to hear.



Ideal Customer Persona

DEMOGRAPHICS

Name

Age

Gender

Family Status

Job Title

Income

Location

Education

COMPANY

Industry

Size

Stage

Yearly Revenue

Product/Service



PSYCHOGRAPHICS

Hobbies & Interests

Social Media Platforms / Entertainment

Apps, Books, Magazines, Podcasts

Personal Style

BELIEFS/VALUES

Core Beliefs

Core Values

Other Insights



PERSONALITY

Demeanor

Mindset/Attitude

Characteristics/Humor

Communication Preferences

SOLUTIONS

Business Goals/Aims

Challenges/Pain Points

How Do They Find Us?



CUSTOMER DNA

Customer DNA refers to the 3-4 core attributes that define your ideal customers.

Think of them as a quick reference guide that directs all of your branding and marketing efforts. These are the attributes to keep in mind when creating content, designing ads, creating a white paper or guide (like this one!), or writing your email newsletter.

They are the key elements that drive everything you do.

Our Example

Here at SHFT, we've identified the following as our Customer DNA:

Founder

Our customers are primarily founders or CEOs.

Stagnant or In Transition

Growth has stagnated or they are in transition (new industry or service).

Successful Product/Service

They have a successful product or service that is already generating revenue.

Little to No Marketing

They either have no or an extremely small marketing team.

Attribute 1:

Attribute 2:

Attribute 3:

Attribute 4:



Negative Customer Persona

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How Do They Find Us?



Need More Help?

Struggling to fill out your personas or not sure how to turn the insights you gathered into usable information?

We help B2B companies nail down their ideal customer personas and turn those insights into actionable steps to grow their brand.

Schedule a call with us to talk through options or to book a 1-hour consultation to review your persona and give you actionable steps forward.

Book at a call at shft.agency/discovery



Your Next Steps

Creating an effective brand starts by taking the right steps. Grab more of our resources, sign up for our email newsletter, or book a time to chat with us to see how we can help you build a profitable brand and generate more revenue.

1

Download More Guides

We have a variety of free and paid guides you can download from our website to grow your brand and content strategies.

Visit shft.agency/guides

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Looking for more ways to grow your brand? I share practical advice, strategies, and tactics every Monday in the SHFT Insider email newsletter.

Visit shft.agency/shft-insider

2

3

Work with Us

Become the ONLY choice for your ideal customers with our brand strategy, brand design, and content services. Our clients achieve clarity, find a-ha moments, and see an increase of 20% or more in revenue.

Book a call at shft.agency/discovery

Learn about our services at shft.agency/services



Your Strategist

Jason Vana

I am a brand and content strategist, entrepreneur, and founder of SHFT. Before social media even existed, I was creating content that drove revenue and positioned brands as the premium choice in their industry. Fast forward 20 years and my strategies have turned previously unknown businesses into worldwide, category-dominating brands. When I'm not leading the team at SHFT, I can be found hiking, traveling, brushing up on my Czech language skills, or ripping apart bad sales and marketing tactics as #sassyjason.

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