

Persona Name



Occupation [Insert Title]
Gender [Insert Gender]
Age [Insert Age]
Education [Insert Education Level]

What is the person's character?

[Describe what the person's daily life is like. Where does she go? What does he drive? What are her hobbies? What makes his day better?]

What is the customer's pain?

[Describe the specific pain point that would drive your customer to look for a solution.]

What are the customer's reasons for using the product?

[Describe the specific tasks that your ideal customer hopes to do with the product or service.]

What are the customer's needs and expectations of the product?

[Describe the specific benefits that your ideal customer hopes to gain from the product or service (lower costs, higher revenue, better quality, status, etc.)]

Any personal biases about the product or product space?

[Describe any barriers you will need to overcome to close the business (trust, price, reputation, functionality).]

What does the customer gain?

[Describe what the customer has after the sale is complete and everything is delivered.]



Tricia Example



Occupation Director of Marketing
Gender Female
Age 35
Education B.S. Marketing - USC

What is her character?

Set for life – starting to spend time on philanthropic events, kids are in high school, comfortable in her position, likes nicer things.

What is the customer's pain?

Customer churn is hurting the business. The bank has tried a number of solutions using in-house resources, but the tide hasn't turned. Pressure is building is to stop bleeding and improve revenue!

What are her reasons for using the product?

Anything she does that shows how smart she is gets rewarded. She wants to be liked and respected, so making good decisions that reinforce that is key. Being considered a leader is a plus.

What are her needs and expectations of the product?

Must do the job, must not add extra work.

Any personal biases about the product or product space?

Someone else has to do the analysis on the engine – she has trusted confidantes to review the secret sauce and tell her if it'll do the trick.

What does the customer gain?

If the system works, the business starts on an upward trend, which is a relief and a more exciting direction for employees and the shareholders.

