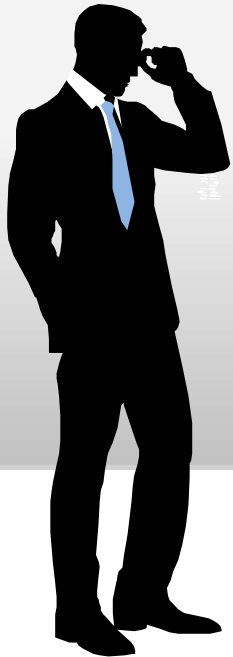


THE CLIENT PERSONA DISCOVERY PROCESS



CLIENT PERSONA WHAT ARE THEY?



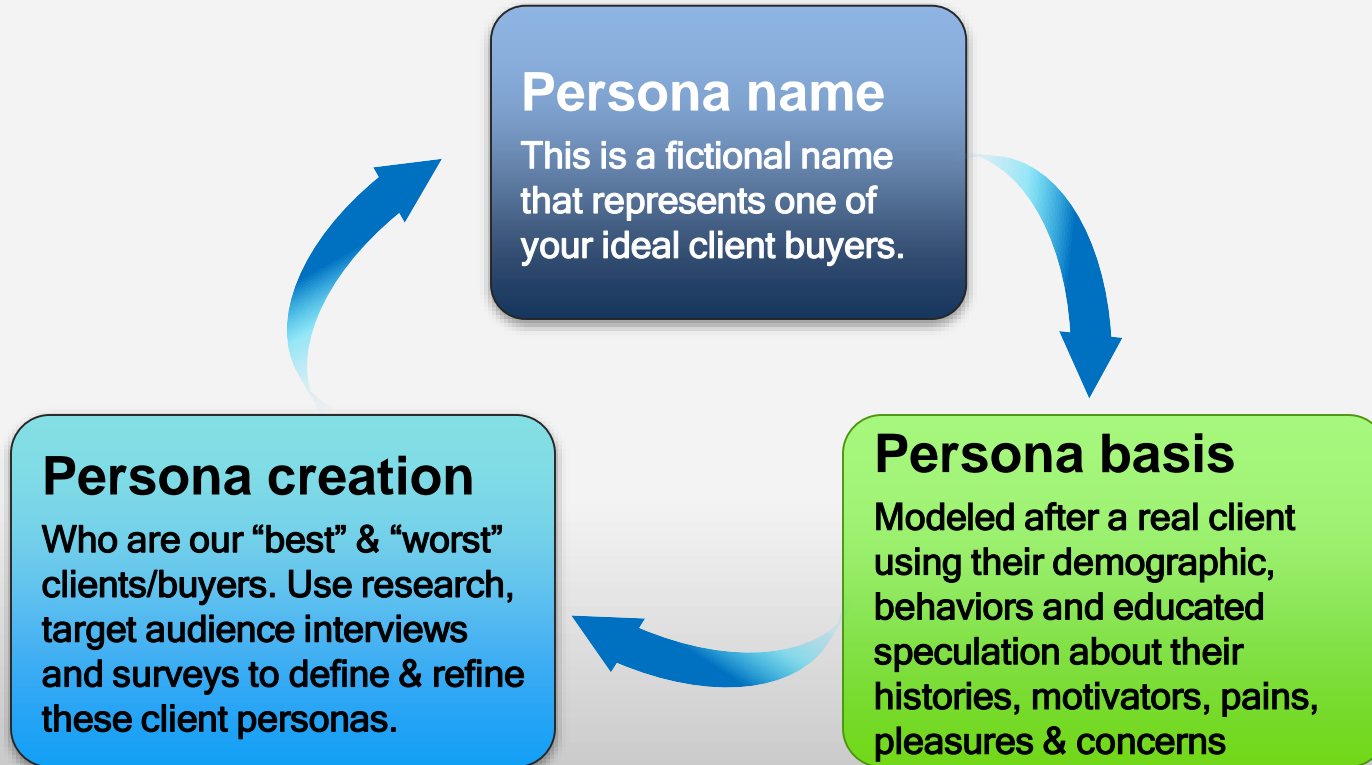
What is a client “Persona” anyway?

A fictional representation of your ideal customer. It is based on *real data* gathered from current, prospective and target clients combined with behavioral research. A persona includes client demographics, online behavior, and educated speculation about personal histories, motivations, buying habits and market concerns. Personae identify common “pain points” and “shared goals” enabling a marketer to tailor messaging around real pains & pleasures.



CLIENT PERSONA

WHERE DO THEY COME FROM?



CLIENT PERSONA EXAMPLES

Steve

Steve Entrepreneur is a self-made business owner who values his independence and wants to serve his community by providing a unique service combined with exceptional customer service. He is all about value. He wants to feel like he “got a deal.”

Sarah

Sarah Starter is a valued employee who always arrives early and leaves late. She continuously seeks out ways to help make the company better by serving both inside and outside the organization. She is the epitome of a company woman.

Let's take a look at what makes Steve Entrepreneur tick. We will use Steve as an example persona.



CLIENT PERSONA

STEVE ENTREPRENEUR'S

POINTS OF PAIN & SOLUTIONS

Point of Pain: Steve wears many hats and juggles different duties

You can offer solutions to one or more of Steve's time consuming duties. (e.g. become his off-site HR, marketing, or accounting department with a dashboard that keeps him informed)

Point of Pain: Steve lays awake nights concerned about cashflow

You should convert a portion of his business to direct pay via credit card by offering his products online via an ecommerce website.

Point of Pain: Steve wants to manage fewer employees

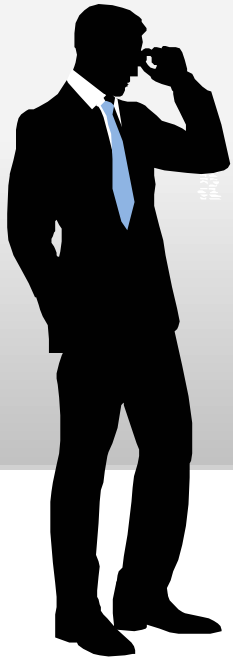
You can automate & manage much of his sales & marketing using CRM, marketing automation, and process management technologies to drives incremental sales with no rep.

ALL THIS INFO JUST BECAUSE WE HAVE IDENTIFIED STEVE'S PERSONA.



CLIENT PERSONA

STEVE ENTREPRENEUR



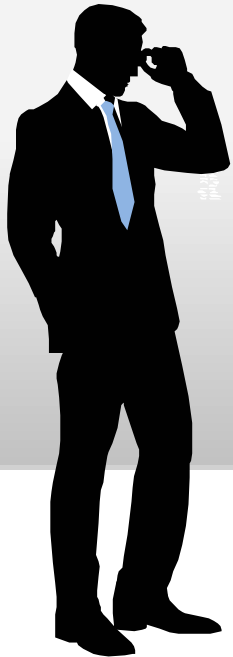
Steve's personal background:

- **Where did Steve start his career and why?** *He delivered newspapers as a teenager, worked in a restaurant washing dishes through college and started in the mail room in his current company.*
- **What gets Steve out of bed in the mornings?** *He is excited about his job and looks forward to interaction with his team and clients.*
- **What keeps Steve up at night and why?** *He can't help thinking about all the families his company feeds and how important cash flow is.*
- **What are Steve's hobbies, sports & interests?** *He plays racketball and skis. He is dedicated to his family and attends his kids sports events.*
- **What does Steve do for fun?** *He loves to work in the garden.*
- **What are Steve's credentials?** *He has his MBA from Harvard and is president of his local trade association chapter.*



CLIENT PERSONA

STEVE ENTREPRENEUR



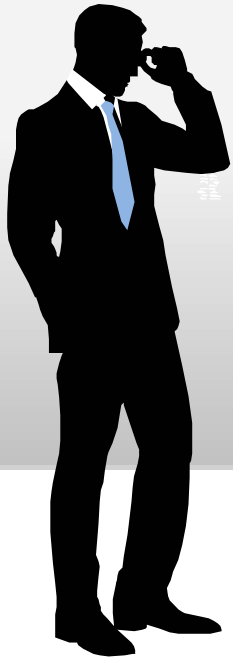
Steve's professional background:

- **What kind of company does Steve work for?** *ABC is a technology company with a strong research division.*
- **What is Steve's role in his company?** *Steve is the President & CEO.*
- **Why is Steve qualified for this position?** *Steve has served as CTO, CIO and CFO with similar companies offering vast experience.*
- **What does Steve do for fun?** *Steve spends time with his family, and meets his friends weekly for racketball.*
- **How does Steve spend his vacation time?** *Steve and his wife take a cruise each year and plan several family skiing trips.*
- **Does Steve have any hobbies or special interests?** *Gardening is Steve's passion.*



CLIENT PERSONA

STEVE ENTREPRENEUR



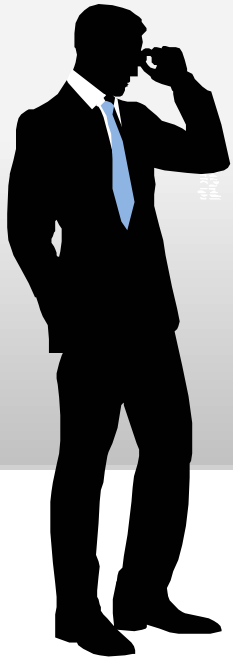
Steve's characteristics & demographics:

- **What is Steve's gender, age, and family situation?** *Steve is male, 42 years old and married with three adolescent children.*
- **What is Steve's household income and wealth status?** *Steve makes about \$250K from his job plus about \$50K from investments.*
- **What is Steve's living preferences – urban, suburban, or rural?** *Steve loves his home in the mountain suburb of Denver, Colorado.*
- **What makes Steve stand out – buzz words, humor, mannerisms, traits?** *Steve has a dry, but great sense of humor and is a great listener.*
- **What words would Steve use to describe himself?** *Self-assured, driven and empathetic.*
- **What does Steve say when he is trying to be humorous?** *Usually something that makes light of his own actions.*



CLIENT PERSONA

STEVE ENTREPRENEUR



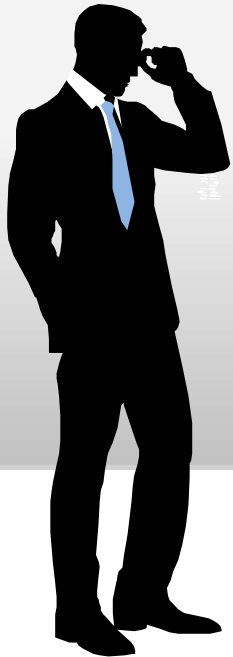
Our message to Steve:

- **How can we use this information?** *Our message to Steve must be brief, informative, fun and positioned creatively.*
- **What response do we want to solicit from Steve?** *Steve will be eager to meet with our company, hear our message and apply it to his situation.*
- **What pain(s) can our products/services relieve that target Steve?** *Our company's program will minimize your need for employees while providing a management dashboard with all important KPIs in one place.*
- **What pleasure(s) can our products/services provide for Steve?** *Our products & services will give Steve control and more free time.*
- **Why should Steve listen?** *Our case studies validate our message.*
- **Why should Steve trust us?** *Our testimonials prove our case.*



CLIENT PERSONA

STEVE ENTREPRENEUR



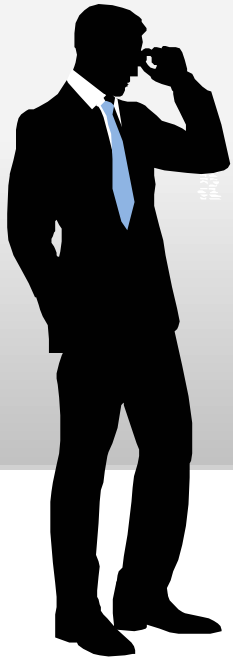
Steve's objections to our message:

- **I can't afford it.** *The cost of non-compliance will come back to you later. You can pay us now or pay the government later. It won't just go away.*
- **You don't understand our culture.** *Do you understand your culture? We will help you define it.*
- **We need security & confidentiality.** *We are bonded & insured plus we have references and testimonials. We offer SaaS 70 certification.*
- **We will lose control.** *If you don't have an expert, you don't have control.*
- **How do I know I am getting my money's worth?** *Test us and you will see that we take care of the details so you can run your business.*



CLIENT PERSONA

STEVE ENTREPRENEUR



Steve's points-of-pain:

- **Steve wears many hats and juggles many different duties**

Our company's online solutions will save both management and execution time as well as costs while offering more management control.

- **Steve lays awake nights concerned about cashflow**

Our company's online solutions promote direct payment via credit card which facilitates better cash flow while saving clients time and money.

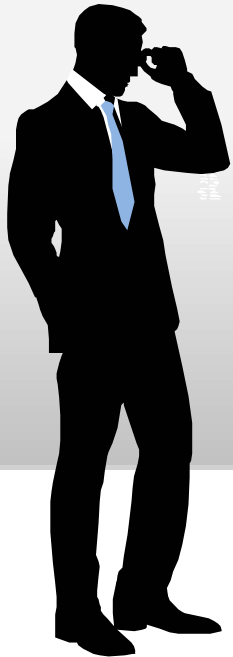
- **Steve wants to manage fewer employees**

Our company will automate & manage Steve's sales & marketing using CRM, marketing automation, and process management technologies to drives incremental sales eliminating the need to hire more sales reps.



CLIENT PERSONA

STEVE ENTREPRENEUR



Our marketing message to Steve:

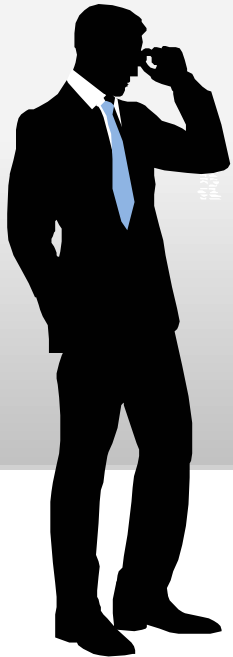
Our company's will provide online solutions that will save your company both management and execution time while reducing operating costs and providing optimum management control.

Our company's online solutions will promote direct payment via credit card to improve your cash flow while saving your clients time and money.

Our company will automate & manage your sales & marketing by integrating CRM, marketing automation, and process management into one system with one management dashboard to drives incremental sales which will eliminate the need for additional sales reps.



CLIENT PERSONA STEVE ENTREPRENEUR



Our 30-Second Elevator Speech to Steve:

We provide online solutions that save management and execution time while reducing costs, improving cash flow, and providing optimum management control through integrating all of your processes into one system.



NEXT STEPS

CONDUCT THE SAME EXERCISE FOR SARAH STARTER, AND OTHERS ...
THEN, WHERE DO WE GROW FROM HERE?



Complements of



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