

Buyer Persona Worksheet

A buyer persona is a fictional profile that represents your ideal prospect, lead, or customer. Buyer personas should not be individual customers, but rather a research-based representation containing some demographic information. They are generalized characters that are fictional, but realistic.

KEY DEMOGRAPHICS

What is notable information about this person? Age, location, education, background, experience, relationships, income, gender, etc.

PROFILE OVERVIEW

Who is this person at a glance? What is their story? What keeps this person up at night? What does a day in their life look like?



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ROLES + RESPONSIBILITIES

What does their role include, what is their level of seniority, and what do they consider their job?

KEY MOTIVATORS

What are personal + professional goals?
What do they value most?
What drives decision-making?

CHALLENGES

What are 'bumps' in their road?
What are challenges they face + pains bogging them down?

WATERING HOLES

Where does this person go for information?
What are the sources, people, or places they look to?

VALIDATIONS

What info helps this person make a decision?
Surveys, testimonials, reports, research? How do they validate or feel confident about decisions?

OBJECTIONS + FAQs

What are their most common objections to your product or service?
What questions do they ask? **Think: The questions your sales reps get frequently.**



CORE PROBLEMS

Why does this persona come to you? What is the core of the problem or challenge they have? Be specific and think about any possible problem(s)

SOLUTIONS + EXISTING ALTERNATIVES

What are various solutions or options that are available to this persona that will help fix their problem or challenge? ***Think beyond your business.***

YOUR DIFFERENTIATORS

What are value propositions that are unique to your business and will stand out to this persona? What do you do or provide that is important to them?

Questions To Ask

Below are examples of questions to ask current and prospective clients — both B2B and B2C — to gain further insight to your personas, their thought process, etc.

1. Tell me about yourself (personal demographics: age, marital status, children, level of education, race, career path, interests, proficiencies, etc.)
2. Where do you go for information on [x]? Magazines, online (what websites?), social media (which channels?), video, written content, podcasts, in person meetings / information, etc.
3. What lead you to becoming a customer of [x] / What lead you to find [x]? How did you learn about [x]?
4. B2B: Are you the decision maker, or what role do you play in the purchasing process? What is the purchase process?
B2C: Who influences the decision + purchase you make? Spouse, children, relatives, friends, networks?
5. What associations and social networks do you actively participate in? Why? What do you like about them?
6. What problems or challenges does [x] help you solve or help make easier?
7. Was there a service or outcome from [x] that made your purchase decision either simple or more difficult to make? What was it? Why was that a big part of the consideration?
8. What is your favorite thing about [x]? What is your least favorite thing about [x]? Why do you choose / not choose to do business with [x]?
9. Does seasonality affect your purchases + decisions making? What time of year is that? Do you always go back to the drawing board or typically renew / stay loyal to the same providers?
10. In your opinion what does (or doesn't) help [x] set them aside from competition? What makes them different from others?

Remember that your sales reps are an excellent resource to uncover the questions, concerns, and cares that your customers and prospective customers have!



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