

# The **Buyer** Persona Manifesto

**Persona marketing clarifies buyers' real concerns with actionable insights other marketing strategies cannot match. But skillful execution is crucial.**

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*“The buyer persona goes a critical  
step further to reveal the story behind  
business that doesn't come to you.”*  
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# 1. Confessions of a **buyer persona evangelist**

**It was an insight that changed my outlook and defined my life's work.**

As a marketing executive I faced an insurmountable obstacle: a rock threatening to sink a start-up with an ingenious solution to an emerging enterprise software issue. But since companies had not yet realized the problem, nobody was tasked with solving it. We thought we knew who should be concerned with the issue, but we could not get them to focus on it.

I'll tell you the story further on. But after years of losing money as we struggled to overcome this obstacle, I had an insight that not only led to a solution; it turned the company into a runaway success.

I didn't have a name for it at the time. But when I later heard about a then-new strategic marketing tool called "buyer personas" I was an instant believer. I had already felt its power.

Having seen the light, I soon became an evangelist for buyer personas by

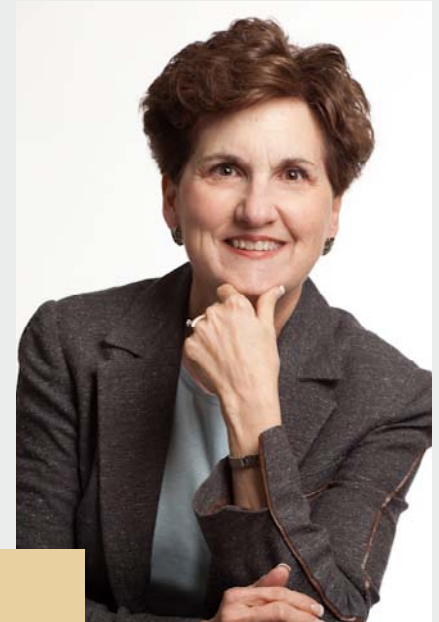
way of a seminar, Effective Product Marketing,<sup>™</sup> that I authored and led for Pragmatic Marketing®. Over the course of 10 years I taught progressive marketers all over America and many other countries.

When we started, the buyer persona was a brand-new concept. We could see clearly its benefits as a strategic tool. What we lacked was the body of experience needed to equip marketers with a proven execution road map.

Looking back, I have to confess how critical that execution piece is.

Steering the proverbial supertanker is a snap compared to introducing any new idea in a major corporation. With a ship, at least you know that if you crank the helm hard, it will eventually come round.

Plus, I've come to realize that while the buyer persona is a tool every bit as sharp as predicted, it is not like scissors, something anyone can pick up and use right away.



*Adele Revella*

More than 5,000 people attended my seminar over 10 years, and many have stayed in touch, emailing to report on the joys and frustrations of working with buyer personas. Some rave about the amazing feats they have achieved. Others need a hug as they relate how it all went wrong in execution. Together we puzzle through why and how.

Having seen literally hundreds get it either right or wrong, I now know all the snakes and ladders by heart. That's why my focus has changed from **telling** marketers what the buyer persona can achieve to **coaching** marketers, step-by-step, as they execute.

Realizing the value of buyer personas takes focused and sustained effort;

insightful strategic application; and skillful execution.

But as this e-book will show you, the payoff goes way beyond impressive sales growth.

Applied with skill and determination, this tool can transform marketing from a passive, outward-facing function to a key source of strategic insight closely watched — and respected — by top management.

This e-book is not a how-to guide for dabblers. It is a manifesto for radical transformation, aimed at progressive B2B marketers who won't sit still for the status quo. If that's you, read on... and enjoy!



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**It is a manifesto for radical transformation...**

**...read on**



## 2. So what is a **buyer persona**?

**It's an archetype, a composite picture of the real people who buy, or might buy, products like the ones you sell.**

It's an avatar you craft from what you learn in direct interviews with as many buyers as possible. And from behavior observed anywhere else: at industry conferences; in online forums; through social media.

If crafted with skill and insight, the person who emerges in this picture may become as real to you as anyone you can ever remember meeting. In your mind's eye, this person becomes three-dimensional to the point that you can see the world through his or her eyes.

Expect other characters to appear through this lens: bosses, internal users, finance functionaries and rivals — and others with input into your buyer's decision-making process.

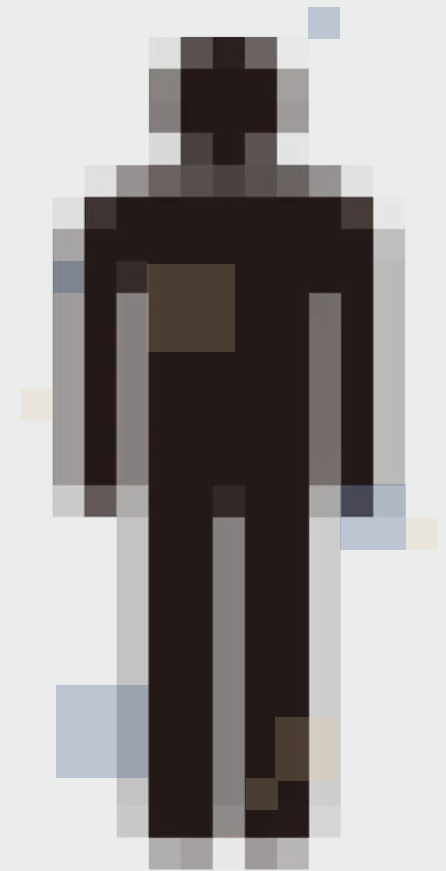
These composite people are not your long-time customers. They are your

competitor's customers, your recent conquests — and perhaps even those who have never considered buying simply because they had no idea that a workable solution was within reach.

This distinction between buyer and customer is critical, because marketers assume all-too-often that customer experience tells the full story. The buyer persona goes a critical step further to reveal the story behind business that doesn't come to you.

I recommend looking at the buyer from two perspectives.

The "Core Buyer Persona" seeks to understand the buyer in his own environment — without reference to whatever you might want to sell him. This tells you whether the buyer is looking for solutions like yours, or is busy with other priorities. The second perspective — what I call the "Product Persona Connection" — reveals the buyer's attitudes about your product and company.



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In tandem, these two perspectives bring the issues that matter to buyers into sharp focus — allowing marketers to see their product as the buyer sees it.

So instead of talking **at** the buyer, blurting out a “me-me-me” narrative with absolutely no consideration of his real concerns, marketers can get straight to the heart of the matter.

When buyers find they don’t have to wade through reams of irrelevant babble to get straight answers to their concerns, I’ve seen response

that borders on euphoric: “These people get it! They understand exactly what I want!”

Every time that happens, you have a chance to form a bond of trust that rivals may not be able to overcome — even with substantially lower pricing.

The buyer persona’s buzz-saw ability to “cut the crap” in messaging is only the beginning of the story. Read on to learn how the buyer persona can yield insights that provide decisive guidance to overall corporate strategy.

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### 3. What can the **buyer persona** help you see?

**Ask the boss at almost any company if his people know who their buyer is, and how that buyer decides, and you can expect a confident answer, "Of course, we do!"**

Ask the same question down in Marketing and you are likely to get a more nuanced answer. Savvy practitioners know that far too much guesswork is involved. The truth is that, beyond a few very basic binary data points (e.g. "67% liked this; 33% didn't"), most companies have only the faintest idea what lies behind the buying decision. We presume an awful lot.

What's more, most companies lack a way to usefully model and apply what they already know. To harness whatever insights they have, marketers need a three-dimensional way to share their understanding of the buyer's story, among themselves and throughout the enterprise.

Scratch the surface and you are likely to find that buying decisions are driven by emotional factors then

justified by rational factors about product and pricing. Any number of subjective factors can distort the process: office politics, conflicting priorities, nationalism, you name it.

Not that anyone on the buyer side will tell your sales rep about any of this. Everyone likes to put on a rational face.

The buyer persona is a tool that can help you see way deeper than a scratch into the buyer's thinking. Once you get down there, you will uncover unexpected answers. You may even find the person you **thought** was your buyer has no interest in considering your proposition.

In fact, that was the revelation that opened my eyes to this approach.

As mentioned earlier, a long time ago I headed marketing for a startup based on an ingenious solution to an enterprise software issue.

Corporations were just switching from building software from scratch

to licensing off-the-shelf software platforms for key business applications. But since licenses didn't come with "source code" there was an inherent risk in the arrangement. What if the software vendor went bankrupt?

Our answer was simple but ingenious: "software escrow." As a trusted third party we held the source code for release to the licensee if the vendor could no longer support its product. We were sure executives and their attorneys would snap at this bait like hungry bass.

As this was pre-internet, we advertised in relevant trade publications and targeted direct mail to all the relevant executives we could identify. But when we managed to get one on the phone, our sales reps often said they could almost hear him yawn.

After years of losses we were desperate to figure out why our proposition wasn't taking off — to the point that I proposed shutting the whole thing down. But our CEO asked me to take another crack at it, so I did.

With no theories to guide me, I worked like a detective, reading everything I

could find and phoning everyone I could think of. I volunteered for industry task forces and attended any conference where I might meet potential buyers and influencers in a non-sales setting. I wanted to see how they thought.

When I came across the answer I felt like an anthropologist discovering a lost tribe in the Upper Amazon.

I found this obscure workshop for people with a job title that I didn't realize existed. They were "contract administrators," functionaries hidden deep in the corporate bureaucracy.

We had been pitching way up the food chain to executives who should have been worried by their dependence on third-party software. But they were too focused on immediate priorities to even think about a fire that had yet to start.

Who we should have sought were those who had the problem we aimed to solve on *the desk in front of them*.

Our buyer was the contract administrator — and we didn't even know it. We'd spent years talking to the wrong end of the horse!

**We'd spent years talking to the wrong end of the horse!**





Having identified this tribe, like an anthropologist, my next challenge was figuring out how to make contact. Would they even care about our solution?

What I read in the workshop agenda made me wonder. Buried deep in the 8-point-type listing of sessions I found one entitled: *“Software escrow and why it doesn’t work.”*

Fast as I could dial (okay, we did have push-button by then) I called the organizers in Florida to demand: *“Wadaya mean, ‘software escrow doesn’t work?’”* Next thing I knew I was leading their new session: *“How to make software escrow work.”*

Whatever value those workshop participants got from the program, the chance I got to examine my lost tribe at close range was worth a thousand times more.

Thanks to what I was able to learn from listening to people whose needs our product really answered, DSI escrow finally took off. Our revenue began to double each year, and within five years the company was acquired by Iron Mountain,

as that company extended its reach from document storage to digital solutions.

How do you model the kind of learning those contract administrators gave me?

Afterward, I realized that what I learned about these buyers did not come on slides with bar graphs and pie charts. It came from immersing myself in their world to learn what motivated and frustrated them, and to understand what consumed their time and budget.

They were willing to talk frankly about what value they saw in my service. Even more critically, some told me why they could live without it. Others told me straight-up what I needed to do to help them win over their bosses. I heard the kinds of statements and tone that caused them to nod their heads in agreement — and what turned them off.

Once I had done several workshops on software escrow, participants’ stories began to blend into a single narrative; their faces became a mosaic and then a composite picture.



**What I learned  
about these  
buyers came from  
immersing  
myself in  
their world.**



I didn't have a name for it then, but when I first heard the term "buyer persona" I knew instantly what it meant — and why it was vitally important.

I overcame that escrow challenge — but I had to work way too hard to do it. Since then, buyer persona methodology has moved light years ahead.

We can now gather critical insights quickly and efficiently. We understand

exactly what we need to know about buyers in order to guide strategic business decisions. And we can effectively share those insights throughout the enterprise.

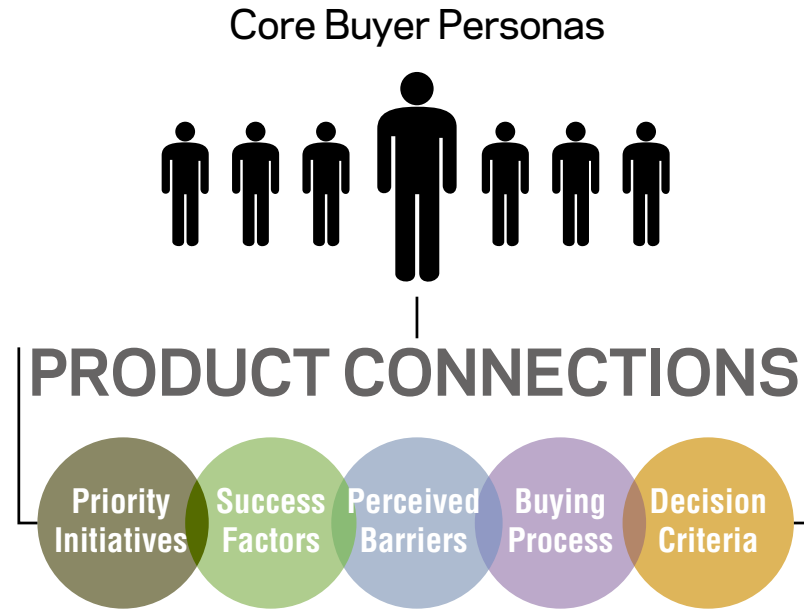
Intelligent application is still essential, but the process is now straightforward and repeatable.

The starting point is to take stock of what insights into your buyers you are missing.

**When I first heard the term "buyer persona" I knew instantly what it meant — and why it was vitally important.**



## 4. What you **don't know**, what you **need to know**



**Once marketing teams realize how little they actually know about their buyer, many react by rushing madly off in all directions in search of information.**

At this point I often have to say, “Whoa, slow down!” It’s all too easy to get distracted by irrelevant and even trivial questions. I’ve actually seen teams get bogged down in debating whether the buyer persona is blond or brunette.

Let’s short-circuit all that by listing what you really need. For B2B marketers, the buyer persona needs to deliver five key insights that I call:

### ***The Five Rings of Insight™***

**1. Priority Initiatives:** To what three-to-five problems or objectives does your buyer persona dedicate time, budget and political capital? This is the centerpiece of the Core Buyer

Persona. It's about his or her worldview, not you or your product.

- If your product addresses one of these priorities, this persona may be your primary buyer. If not, your primary buyer lower down the totem pole may still need this persona's signoff.

- Avoid generalizations that do no more than restate this persona's role or job description.

The other four Rings of Insight link up to form the "Product Persona Connection."

**2. Success Factors:** To understand the buyer's approach to a Priority Initiative, identify what tangible or intangible rewards he or she associates with success.

- Clearest factors are tangible metrics assigned by management: "grow revenue by X, cut costs by Y."

- Even if the buyer has no tangible metrics, something is always at stake — e.g. getting fired or demoted if a risky decision goes wrong. The real story may be about ego inflation or the desire to one-up rivals.

**3. Perceived Barriers:** What could prompt the buyer to question whether your company or solution is capable of achieving his or her Success Factors?

- This is where you begin to uncover critical unseen factors. You may find the buying decision hinges on things that have nothing to do with your product. Take a sports car buyer for example. No matter how impressed he is by your model's finer points, the deal may hinge on persuading his wife that the car is more important than renovating her kitchen. Good luck.

- Look for elephants in the room. A looming business-process change may be coloring all decisions; getting end users to accept change may be tough; toxic office politics may override rational decision-making. This is real-world stuff.

- Other Perceived Barriers may stem from prior experiences with your product or company; with similar products; or negative feedback from media coverage.

- Expect to find Perceived Barriers that are no longer (or never were) factually correct.

**4. Buying Process:** What process does this persona follow in exploring and selecting a solution that can overcome the Perceived Barriers and achieve the Success Factors?

■ These insights are best mapped with a table that begins with business triggers that cause the buyer to start searching for a solution, and ends with a satisfied customer.

■ At each step in the buying process, identify each of the buyer personas involved in the decision to proceed to the next step, what role each plays, and the resources each consults to find answers to their questions.

■ Note that this insight details the buyer's process to arrive at a decision, not the selling process as your sales people may have defined it.

**5. Decision Criteria:** What aspects of each product will the buyer assess in evaluating the alternative solutions available?

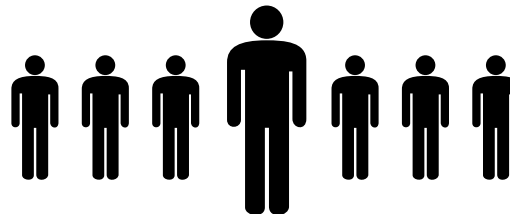
■ In compiling these insights don't fall back on jargon like "easy-to-use" or "scalable." You are after the buyer's

detailed views on product capabilities they see as important. Beyond "what," you want to know how the buyer arrived at his conclusions.

■ If the insight is about "ease-of-use," you need to find what specifically they think should be easy, and for whom. And you want to know how they decided that.

■ To be useful, Decision Criteria should go beyond insights from customers to include buyers who chose a competitor and those who chose to do nothing at all.

These five insight categories give you a framework with which to sort and analyze what you learn from your buyers. How do you get answers to all these key questions? You ask the buyers directly. You interview them.



## 5. Interviewing in search of insight

**Here is where the real skill comes in. To get the required insights you have to talk — well, mostly listen — directly to buyers. You have to phone them up or take them to lunch and interview them.**

How many interviews should you do? Although a highly accurate persona can be drawn from just five or six interviews, a larger sample size lends authority to your research. But quality matters much more than quantity. Five really good interviews are more useful than 50 clumsy ones.

What you might expect to read next, in an e-book by a consultant, is “give us a retainer and we’ll do the rest.” For better or worse, that won’t work.

To get full value from buyer personas, your team needs to be involved in the interviews from start to finish. A consultant can model the skills and provide feedback to improve results, but you can’t watch from behind a two-way mirror. Your people have got to be in on it — because this isn’t a

peripheral, one-off project. This is the core of your marketing effort.

Start with a team that is in the planning stages of an important launch or campaign. The team should include people from each of the functional areas involved in the project. Make their buyer persona work a priority and dedicate time and resources to it. If you say, “Do this when you have time,” failure is all but guaranteed.

Next, select a few people from that team who stand out for their energy, enthusiasm, empathy and curiosity. Only one or two of these people need to lead the interviews. Others can sit in whenever possible so that everyone can share and discuss what they hear. Best practice is to have a second person taking notes, leaving the interviewer free to focus on building rapport.

When doing live interviews, rapport is all about making eye contact — and even many seasoned journalists get this wrong. Instead of looking and listening they keep their heads down

**This isn’t a peripheral, one-off project. This is the core of your marketing effort.**



taking notes. That means they miss the facial expressions and body language that tell so much more than words alone. When you have eye contact, your reaction can encourage a person to answer more candidly, to elaborate.

In a phone interview, without that eye contact, it is tougher to build rapport. That's why the interviewer needs to learn how to keep the buyer talking: "That's *really* interesting;" "Wow, that must've been a challenge for you;" "How did you evaluate that?"

Learn to stifle the urge to correct the interviewee no matter how stupid, wrong or unfair his perceptions are. This will be tough at times, but the interviewer's job is to uncover perceptions not to change them.

Bringing out those deep-down perceptions is a skill that great journalists cultivate. In a friendly way, ask a provocative question that gets the subject engaged. When one line of questioning hits a wall, you move on to another topic, then circle back to probe for further detail.

For anyone with half-decent social skills and a measure of emotional

intelligence these skills are not hard to acquire.

We can help your team develop both interview skills and strategies. We can help you get started with the actual interviews. But unless your team develops the ability to continually refine your knowledge, the project will end and your buyer will fade from sight.

### **So who to interview?**

When your buyer persona team is geared up and ready to go, start by looking for buyers who have made a decision in the last 30-60 days.

This is where you may hit your first obstacle: sales reps may not want Marketing talking to their contacts. So you may need the Marketing head to ask the Sales head to help secure cooperation.

But don't limit the search to your own sales force. Mine the stack of business cards you have from conferences. Trawl through online industry forums. Search Google. Work like a detective to sleuth out buyers. Brainstorm to identify those who should buy but have yet to consider it.

### **Isn't there an easier way?**

*Some may be tempted to take a short cut, trying to get insights from focus groups or surveys. Resist this temptation.*

*Surveys are useful when you know what the question is. Focus groups can get people to choose the best of three alternatives. But these techniques can only confirm the best answer from a list of pre-selected options — validating what you already know.*

*The buyer persona interview process goes deeper to identify the **questions** you don't know. It's the way to get at non-obvious insights that allow you to redefine the competitive playing field.*

## And what to ask?

Once you begin contacting buyers, ask for at least 20 minutes of their time. Make the questions open-ended to get them talking. For example:

- What happened on the day you decided to look for a solution like this?
- What process did you go through to find potential solutions?
- How did you narrow the options down?
- What criteria did you use to evaluate the options?
- How did our solution fare against the competition by those criteria?

With your follow-up questions, aim for as much clarity as possible. Since generalizations like “you guys are the market leader” aren’t actionable, ask why it was important to choose a market leader. Why would

they hesitate to choose a player further back in the pack?

Never assume you know the answer!

When you write up the results, quote the buyer directly. You want to capture the way they talk and the words they choose. You want to highlight the points where the buyer got emotional.

After doing five or so interviews, you should have a sense of which buyer personas are driving the initial purchase decision, and who else is involved. Will the CIO respond to a marketing campaign? Or should you start lower down the food chain?

Armed with that knowledge, shift the focus in additional interviews to questions that emerged in the initial round. Keep at it until you have fully filled the Five Rings of Insight.

In fact, don’t ever stop doing buyer interviews! Your knowledge of the buyer is never complete.





## 6. Putting your insights to work

Insights gleaned from the interview process will equip your team with all they need to develop detailed and accurate core buyer personas, and an actionable “Product Persona Connection.” Guided by these insights, your team will know exactly where to focus their efforts.

**Who?** Now that they clearly understand the buying process, the team may decide (for example) that an early pitch to the CIO is a waste of time and resources. CIO sign-off may be essential in the end, though, so top-level support must be built as the process moves along. But Marketing now knows who down the ladder can initiate the discussion. This insight triggers sales enablement activities that guide front-line sales reps to the right people at each stage.

**When?** Now that they understand what events trigger the search for solutions — budget cycles, equipment-update cycles, business-process changes, expansion plans and more — the team calculates when to contact who.

**Where?** Having identified where buyers begin looking for solutions, the team targets the events, online forums, magazines, bloggers and influential columnists they look to. Knowing what search statements buyers actually use, the team plans to meet them wherever they land.

**What?** Spray buyer persona insights on marcom-babble and wipe with a cloth. What remains are clear answers to questions that really matter to buyers. When freed from wading through gobbledy-gook to find the information they need, buyers are not only grateful but more likely to trust you.

**How?** Buyer persona insights tell you not only what the buyer wants to know, but how best to tell the story. Let your creative team hear the buyer’s authentic voice: the words and metaphors they choose; how formal or informal they are. Don’t stoop to “*Dude, it’s awesome,*” but if your buyer is a 24-year-old techie then you shouldn’t talk like a Pentagon spokesman either.

**Spray buyer persona insights on marcom-babble and wipe with a cloth.**



**Why?** To implement your buyer persona insights the team will inevitably have to overcome internal opposition. For example, engineers may feel slighted if you omit their dense description of features buyers don't want to hear about. Use the insights to explain why you've got to do it.

Here's one pitfall. Teams often get so excited by their buyer persona that they want to introduce him — like a trophy boyfriend — to everyone in the company. Resist that urge. Unless the introduction comes with convincing answers to a critical question, it is too

easy to mistake this as some trivial game in the Marketing department.

Sell the results you achieve with this tool, not the tool itself.

If your buyer persona initiative succeeds, consistent wins will attract attention throughout the company. People will notice how your communications differ from competitors. Even the CEO may start to ask, "What's going on down there in Marketing?"

At this point, your ultimate Success Factor appears on the horizon.

**Teams often get so excited by their buyer persona that they want to introduce him — like a trophy boyfriend... Resist that urge.**



## 7. How the buyer's voice empowers Marketing

### Like Rodney Dangerfield, in Marketing we "get no respect."

The buyer persona can change that.

Why does Marketing get no respect?

For starters, unlike product development, finance or management, our discipline is not the preserve of an established profession: engineering, accounting or business administration. And unlike Sales, the contribution of Marketing is rarely measurable in terms of revenue.

Our function is squishy.

I'm determined to change that. I've seen too many great products and companies fail due to poor marketing. And I can't bear to watch the wasted budget and talent when marketers exist only to execute the will of functions higher up the totem poll,

churning out information into a marketplace that is seldom impressed.

The fact is that Marketing holds little sway over the strategic direction of the company, and that isn't going to change until marketers can bring decisive input to the table.

This is where the buyer persona has the power to drive radical change.

By channeling the buyer's voice — clearly, accurately and persuasively — the buyer persona gives Marketing the confidence to say, "This is what really matters to our buyers. So here's the plan."

My own goal is to see that come about, working hands-on with progressive and ambitious clients to make sure it does.

That's what this e-book is about.

The buyer persona gives Marketing the confidence to say, **"This is what really matters to our buyers."**



To learn more,  
visit [www.buyerpersona.com](http://www.buyerpersona.com)

## ■ About Adele

**If there are others out there who know as much about buyer persona marketing as Adele Revella, they are few and far between.**

A career marketer with decades of experience, Adele has approached the discipline from all sides: marketing executive, consultant, trainer and entrepreneur.

Traveling the globe for more than 10 years, Adele introduced the buyer persona to over 5,000 marketers through a two-day seminar she developed and led for Pragmatic Marketing.

By keeping in touch with hundreds of seminar participants

working with buyer personas — hearing what works and what doesn't — Adele continues to sharpen her ability to help marketers achieve their full potential with the methodology.

Ten years ago, Adele and husband Steve traded the Arizona desert for the misty delights of San Juan Island, Washington, halfway between Seattle and Vancouver.

When she's not on the road, Adele supports progressive marketers around the world from an office looking across the Salish Sea to the snow-capped Olympic Mountains.



*Adele (and Arie)*

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