A framework for
PERSONA OPTIMIZATION

ci ntell

m. The Marketing Advisory Network

The company who understands their buyers best, wins.

An industry-wide benchmark study of B2B organizations found that those who exceed revenue and lead goals are **more effective at creating, using, and consistently maintaining personas** than companies who miss these targets.

From these core findings, this framework was developed to clarify the distinct components of a successful persona strategy, and provide a structure for marketers to guide their plans towards full optimization. With this frame of reference, you can identify areas for improvement and the steps to get there.

Read the research
Cintell.net/2016-benchmark

Persona Optimization Framework

CORE ATTRIBUTES

	Fully Optimized	Advancing	Emerging	Experimenting
Internal Persona Ownership	At least one internal resource with persona related KPI accountability	Persona work integrated into job description for specific role within the organization	Project lead assigned to persona work	No resource held accountable for persona research or maintenance
Sharing Personas	Fully accessible across all lines of business. Used as mandatory part of planning processes, new offer launches, sales conversations, and campaign development	Documented across highest revenue producing parts of the business. Integrated into new offer introduction processes	Verbal only or partially documented personas for one key area of the business. Some documented profiles might be masquerading as personas	Ad hoc or non-documented verbal personas referenced or persona research planned
Budget Allocation	Budget allocation dedicated to persona research, technology, maintenance & training annually	Budget allocation dedicated to research and technology annually	Small budget allocated to persona project - no systematic budget allocation	Ad hoc budget allocated, heavy reliance on internal opinions, resources & data
Training	Persona training integrated into new hire orientation and offered as regular cadence across the organization	Persona training open to all parts of the business.	Persona training completed for sales & marketing staff	Ad hoc persona training planned upon completion of research
Executive Sponsorship	There is executive sponsorship from the CEO. Although the CMO is the primary sponsor, each member of the executive committee has assigned leaders on their team to ensure personas are utilized across the organization	CMO takes on leadership role with personas being a formal part of the charter for marketing with support from stakeholders in sales and product	Line of business or director of marketing sponsors persona initiative with support from stakeholders in sales	Line of business or director of marketing sponsors persona initiative

CREATING

	Fully Optimized	Advancing	Emerging	Experimenting
Qualitative Interviews	A regular cadence of qualitative interviews dedicated to persona research are conducted with both customers and non-customers	A regular cadence of qualitative interviews dedicated to persona research are conducted with both customers & non-customers	Small number of qualitative interviews conducted primarily with clients at the initial stage of persona research. Heavy reliance on internal employee interviews	Persona attributes are compiled using existing content or internal stakeholder interviews
Quantitative Survey	Survey tools are used to identify and validate persona research for both customer and non-customer communities	Ad hoc surveys are used to validate persona work	Surveys are used to collect profile information from the existing customer or lead database	Surveys are used to collect information from internal stakeholders.
Data Analysis	In addition to CRM data insights, extensive external data sources are utilized to augment internal data - this might include personality attributes, professional details, membership, social indicators, education level, income, etc	Regular leverage of internal CRM data with some external data sources are utilized to augment internal data - this might include personality attributes, membership, social indicators, education level, income, etc	Only company level data is integrated from third parties, with little to no systematic use of internal CRM data	No third party data is utilized and only cursory CRM data usage occurs to create personas
Industry Research	Both competitive and industry trend research is conducted at least quarterly	Both competitive and industry trend research is conducted at least once a year or around new growth initiatives	Review of competitor websites and publically available industry research upon initial persona project, no systematic approach to maintaining	Some industry and competitor research conducted to validate internal beliefs
# of Personas Developed	The full customer community is represented by persona for user, champion, economic buyer and influencers. This could mean four or more personas	Most of the customer community is represented by personas including at least 2 of these groups (user, champion, economic buyer & influencers)	Only decision-maker personas are created	Ad hoc persona development that covers primary buyer only
Depth of Personas	All or most of the following are included in personas: demographic information, role in the buying process, buying preferences, hobbies & interests, organizational goals & priorities, drivers & motivators, fears & challenges, associations, content topic preferences, KPI/Success metrics and personality traits	Most of the following are included in personas: demographic information, role in the buying process, buying preferences, hobbies & interests, organizational goals & priorities, drivers & motivators, fears & challenges, associations, content topic preferences, KPI/Success metrics and personality traits	Personas go beyond demographic information to include organizational goals, priorities and fears	Personas are mostly profiles of key demographic information with perhaps a smattering of goals & challenges

USING

	Fully Optimized	Advancing	Emerging	Experimenting
Organizational Use of Personas	Personas are utilized across the entire business including sales training, messaging, product development, customer support, executive decision making, designer inspiration, demand generation and external agency briefings	Personas are utilized across most of the business including at least 4 of these areas: sales training, messaging, product development, customer support, executive decision making, demand generation and external agency briefings	Personas are utilized for marketing messaging and sales training, with ad hoc use across product development or other departments	Personas are utilized for marketing messaging, but no where else in the organization
Database Segmentation	Comprehensive database mapping using progressive profiling, demographic information and content signals	Database mapped by demographic information and maintained using either content signals or survey data	One time database mapping exercise completed. No systematic approach to maintain it. Based on demographic information (title, industry, company size) only	Program-specific list pulls by demographic information (title, industry, company size)
Database Completeness	90%+ of the customer database is mapped by persona & 50%+ of the prospect database has an identified persona attached to each record	At least half of the prospect and customer database has a persona attribute on each contact record	Less than 50% but more than 10% of the database has been mapped	The database contains a field for "persona" which is used ad hoc. Less than 10% of the database is mapped to a specific persona

MAINTAINING

	Fully Optimized	Advancing	Emerging	Experimenting
Frequency of Updates	Systematically updated at least once every 6 months and as part of any new growth initiative	Updated at least once a year and as part of any new growth initiative	Updated every 1 - 2 years	Updated as part of a one-time strategic shift (such as new leadership, new offer launch, etc.)
Accessibility/Storage of Information	Personas are made easily accessible via online collaboration tools that are kept current, along with on-demand training modules	Personas are made easily accessible via online collaboration tools such as Sharepoint, Chatter or an intranet	Personas are stored in static documents e.g. PDF or Powerpoint	Formal personas are not documented
Use of Data to Refine Personas	In addition to CRM data insights, extensive external data sources are utilized to augment internal data - this might include personality attributes, membership, social indicators, education level, income, etc	Regular leverage of internal CRM data with some external data sources are utilized to augment internal data - this might include personality attributes, membership, social indicators, education level, income, etc	Only company level data is integrated from third parties, with little to no systematic use of internal CRM data	No third party data is utilized and only cursory CRM data usage occurs

NEXT STEPS

Create, manage, share, and integrate persona insights companywide with Cintell's customer intelligence platform. Request a demo and experience the power of live, digital SmartPersonas™

Need help taking your persona game to the next level? Contact the Marketing Advisory Network for a consultation at MarketingAdvisoryNetwork.com

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