



Buyer  
Personas  
Worksheet



“Buyer personas are fictional, generalized representations of your ideal customers. They help you understand your customers (and prospective customers) better, and make it easier for you to tailor content to the specific needs, behaviors, and concerns of different groups.”

– Hubspot



**Adam S.**

Chief Medical Officer (CMO)

# Ideal buyer persona

## Background

Chief medical officer of XYZ company.

Married with 2 children.

Medical practitioner for 10-15 years.

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## Age

45-55 years old

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## Salary

\$350k - \$450k

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## Education

Degree type goes here

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## Job Characteristics

- Urban/suburban
  - Probably has an assistant screening calls.
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## Identifiers

- Skews male.
- 3 main types of leadership styles: autocratic, participative and delegative

### Goals

What are their primary goals in this position?  
What would they be measured on for success?

*Engaged in defining the overall business strategy and direction of the organization.*

### Challenges

What are their common challenges?

*Reducing expenses.  
Monitoring and holding hospitals accountable to the quality of provided services.*

### What can we do

How can we help this persona achieve his/her goals?

*Support their mission to reduce costs and provide higher quality care in providing a solution for patients to manage their diabetes better.*

### Common objections

What are the common objections this persona would have about your product/services?

*I'm not sure if our patients will adopt this tool. Also don't want to put more work on my doctors outside of patient visits. How do I know this will work?*

## What I say

Real quotes from persona about goals, challenges, etc.

*"The overriding primary concern or challenge for all CMOs is all hospitals are dealing with unprecedented cost pressures, and we will see more pressure on cost reduction than we have ever seen in our careers. Given that pressure, how do we continue to improve our clinical outcomes and patient safety? That is the single biggest challenge of the medical officer today." (Source)*

## Market Messaging

What are their primary goals in this position? What would they be measured on for success?

*\$140 billion was spent on preventable costs in 2015 and these complications could have been avoided if patients could manage their diabetes better.*

## Elevator Pitch

What are their primary goals in this position? What would they be measured on for success?

*DoseDr works with insurers to offer patients a mobile app to control and manage their diabetes. Empowered patients mean healthier patients, saving your bottom line costs.*



# Example: Director of Customer Success

# Develop Assumptions Around Target Companies

## Stages

### Step One

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Step Two

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Step Three

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Step Four

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Step Five

- Industry
- Company Size
- X-Factor

Example: Director of Customer  
Success

# Develop Assumptions Around Target Companies

**John - the Director of  
Customer Success**

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Company size: Above \$100MM

Industry: Growing B2B technology company

X-Factor: Business relies on corporate customers, relationships, lots of competition, long sales cycles with their customers



# Develop Assumptions About the Person

## Stages

Step One

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**Step Two**

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Step Three

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Step Four

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Step Five

- Responsibilities in relation to your product
- Title
- Demographics – M/F, Married? Kids?
- Tone

# Develop Assumptions About the Person

## John - the Director of Customer Success

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**Responsibilities:** The person is responsible for all customer retention; he or she leads that team that needs to ensure customers sign on year over year and that their accounts GROW with the company

**Demographics:** Age 30-40, probably started off in Sales or as an Account Manager, gets in the weeds with clients on a daily basis

**Tone:** He needs customers to stay happy so is constantly nervous with so much out of his control; he needs to make sure customers are satisfied with his company's services/product and wouldn't consider switching to a competitor, he constantly seeks client feedback

# Determine the Goals of the End User AND the Buyer

## Stages

Step One

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Step Two

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**Step Three**

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Step Four

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Step Five

- What does success look like?
- How is this person bonused?

Example: Director of Customer  
Success

# Determine the Goals of the End User AND the Buyer

## **John - the Director of Customer Success**

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Success for this person is a high retention rate that grows YoY and a clear dollar amount contributed to the business through Account Growth of Current Customers.

John is bonused if the current is able to grow the current book of business by a certain percentage, so he is constantly looking for upsell opportunities and driving his team to built relationships that allow for these to naturally come up in conversation.

# Determine the Pain Points of the End User AND the Buyer

## Stages

Step One

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Step Two

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Step Three

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**Step Four**

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Step Five

- What keeps them up at night?
- What is their number 1 challenge?
- What is their number 2 challenge?

# Determine the Pain Points of the End User AND the Buyer

## John - the Director of Customer Success

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CHURN.

John is kept up at night by unhappy clients who call his team to complain about the product/service his company offers.

John's biggest challenges are finding ways to stand apart from the his competition, ensure his team is meeting the growing demands from current customers and help his team to build relationships that would prevent an individual from moving to the competition.

## Stages

Step One

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Step Two

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Step Three

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Step Four

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**Step Five**

- How do we help them reach their goals?
- How do we help alleviate their pain?

# How do we help?

## **John - the Director of Customer Success**

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By having an opportunity like season tickets or group tickets available for an upcoming game, John can invite his top Accounts as well as his At Risk Accounts for a fun, laid-back way to learn how BSE can be a better partner or salvage the relationship.

By taking the conversation out of the office (especially knowing that many of his customers love going to games), John and his team can build long-term relationships that prompt ongoing commitments and upsell opportunities from their current book of business.



# Questions?

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