

## Personas: The Online Marketing Secret Weapon

**Personas (also referred to as Personae) may not necessarily be the first thing you think about when developing an online marketing campaign.** You might be more worried about the message, or the conversion method, or even details like tracking and attribution. But the reality is, without properly creating and utilizing Personas prior to developing your campaign, you are in fact guessing as to whether your campaign will have the desired impact on your target audience. A better way to improve your online marketing results is to use Personas.

### What Is a Persona?

According to Wikipedia, a Persona is defined as follows:



Personas are fictional characters created to represent the different user types within a targeted demographic, attitude and/or behavior set that might use a site, brand or product in a similar way.

Here at Apogee Results, we like to define Personas as follows:



A Persona is a fictional representation of a common group of users who all share the same critical tasks.

Much like the base of the pyramid, a Persona is the foundation of a good online marketing campaign. Personas have been used for many years by application development teams and usability practitioners, who use the Persona to define critical tasks the user must complete to be successful. However, Personas are still somewhat of a new practice for most online marketing teams.

### Personas are Not Target Audiences:

Many marketers do know who their target audience is, but a target audience is not the same thing as a Persona. Typically with a target audience certain geographic, demographic and related marketing data is used



### Why Personas?

- Knowing your target audience is critical to communicating with them effectively
- More effective communications lead to increased sales

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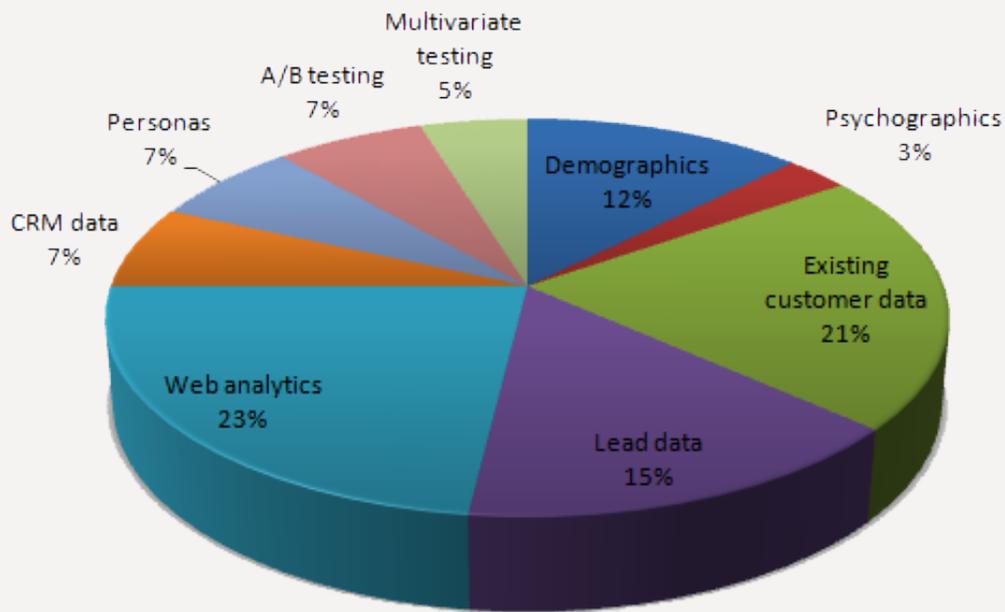
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to cluster groups of prospects. Data like age, gender, zip-code, household income and even prior purchase history are most often used to create clusters of target audiences.

But notice in the above list what's missing. What about behavior? Why are prospects looking for information about your products or services? What problems are they trying to solve? How familiar are they with your products, your terminology, the concept of how you can help them solve their needs? Personas are the tool you can use to answer those behavioral based questions. Coupled with related information from your target audience, you will now have a much clearer picture of whom you are targeting, what issues or needs they have, how your product and service can solve that need, and how to more effectively communicate that with your Personas.

Thus, Personas are the missing behavioral element that enables smart online marketers to be far more effective and efficient at finding, communicating with and selling concepts to their prospects. And that means improvements in conversion, and ultimately your ROI.

In a recent webinar, we asked participants "What online marketing data do you optimize with?" Their answers were:



## Applied to online marketing, Personas can help:

- Shape messaging – By defining who you are trying to reach, what their key needs or problems are, and how your product or service can help them to solve their needs. This information gives you the outline for how to formulate your marketing messaging.



## Persona Methodology

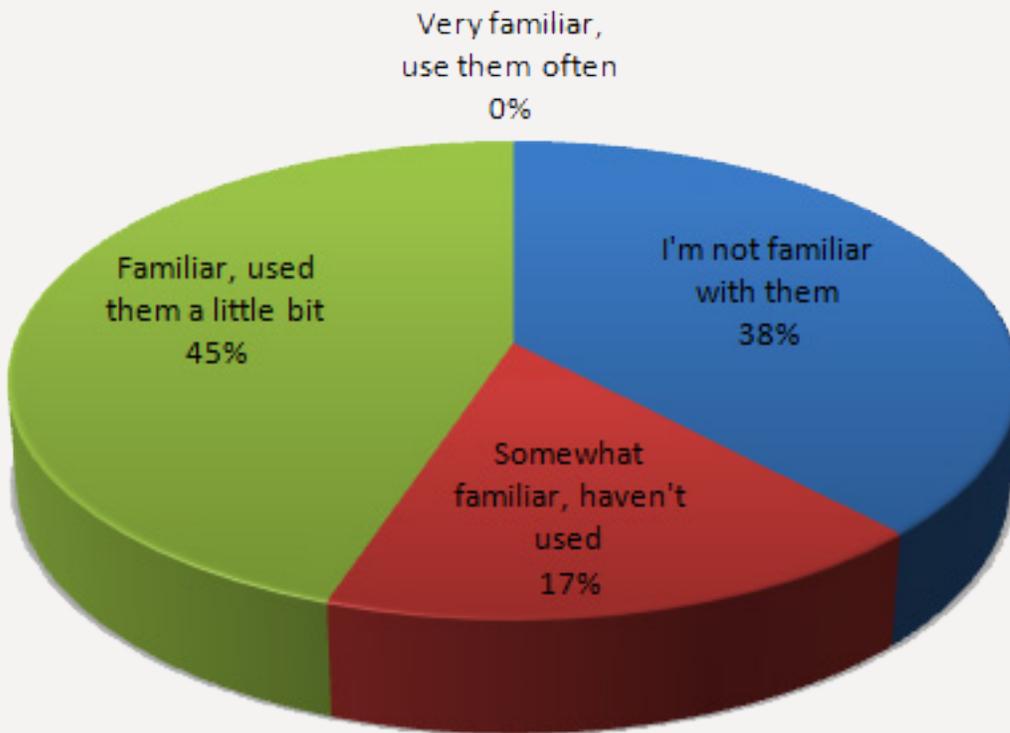
1. Research - Conduct research of prospects contextually, evaluate competitor communications, interview top sales person(s).
2. Define Personas - Identify top critical tasks and list in order based on your customer's priority their top 3 or 4 critical tasks. Create scenarios of use as defined by the most common patterns.
3. Apply Personas - Audit existing online marketing. How well are your current efforts helping your prospects to understand/solve their critical tasks? Identify opportunities to optimize existing (or new) communications based on this audit.
4. Conduct Testing - Utilize A/B testing to evaluate recommendations ala a "Champion/Challenger" approach.

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- Define content – Understanding your Persona and what their critical tasks are makes your job of developing content easier. That's because you have a clear idea of the Persona's pain-points, and thus can shape your content to help them understand how your solution meets their needs.
- Optimize a buy or order-flow – Knowing your Personas and their critical tasks, and understanding their expectations for how they expect to interact with you, gives you very helpful information for testing and optimizing your buy-flows or order-flows. You will have a much better sense of what the Persona is expecting, and thus can tweak your funnels to test based on behavior and knowledge, instead of guessing what elements should be tested.

In a recent webinar, we asked participants "How familiar are you with personas?" This is how the audience answered:



## 7 Steps to Using Personas in Online Marketing:

Developing a Persona or Personas and using them in your online marketing campaigns can be broken down into 7 broad steps. Here's how to incorporate Personas in your campaign development methodology:

1. Conduct Persona Research – With usability practitioners, typically this research is conducted through contextual observation and research, meaning going out to where typical customers or prospects are and observing them using



## Persona Research

1. Conduct Contextual Inquiry - If possible, go out into the field and observe your prospects interacting with or researching your products or services, interview prospects to learn how they think about things.
2. Interview Top Sales Person(s) - Interview your top sales person(s) to learn about key pain points, discussions with prospects and patterns.
3. Evaluate Competitor Communications - How are your competitors communicating with their prospects? What points are 1st, 2nd and 3rd?
4. Audit Industry Communications - Beyond direct competitors, how are related industries communicating with prospects?
5. Analyze Call Center and Website Logs - Spend time evaluating calls received into your call center and/or website communications, searches, customer sat data and FAQ views.

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applications or websites. In online marketing, this can be done, but is expensive and very time consuming. A better way is to carefully interview your top sales team members and key stakeholders, learning from them what the typical issues or concerns are. Ask the top sales reps what terminology prospects typically use. Are there any patterns in common needs shared by prospects that are communicated with the sales team? How does the sales team address those issues, and communicate how the product or service solves the prospects issues?

2. Conduct Competitive Persona Audits – Another way to gain an understanding of Personas is to audit your competitor websites and online marketing campaigns. How are your competitors communicating with their prospects? What terms do they use? How are they defining the needs, and how their products and services solve those needs? What order are these communications in? This information can be very useful for helping you to better define your Personas. But do be cautious! Your competitors may not be communicating effectively or correctly with their prospects, be a good judge and use the data that seems most appropriate and relevant.

3. Analyze Website & Product Data – Examine your website and product sales conversion data carefully. What content seems to resonate best with your prospects? Where are you achieving your best conversion, and where are you not having good conversion? What content are your prospects avoiding or not interacting with? How long are your website visitors spending on key product or information pages? If you are capturing form data, which forms have the highest percentage of starts, abandonments, completions and errors? This data is helpful background data that will provide patterns you can use to better understand your prospect's behavior.

4. Conduct Prospect Research – A great way to better understand your prospects' critical needs is to ask them. If you have phone logs, plug in to hear the conversations your prospects are having with your sales teams. Likewise, going out and interviewing your prospects directly is an amazingly powerful way to capture information about what needs they have, how they picture a product or service helping them, and the terminology they use to define what they are looking for.

5. Define Your Persona – With this research, you can now start to build your Persona or Personas. Your Persona should be a fictional representation of a set of typical prospects based on what critical tasks they share in common. The Persona description should include a story with enough information to define who they are, what problem they have, and what they are looking for to help them. You should also include additional detail, like their domain expertise (how familiar they are with your industry, products, terminology, etc.) and if applicable their channels of interaction (PC? Mobile? Phone? Email? etc.). Based on your research you should aim for several Personas. Just one or two might be enough, but if you find yourself with 7, 8 or more you are most likely being too



## Defining Personas

1. Focus on Key Critical Tasks - The majority rules. Do not attempt to use too many critical tasks as it makes design evaluations too complex.
2. Group Similar Tasks - Bucket similar tasks into one task to consolidate patterns of needs and usage.
3. Create Typical Task Scenario - Based on your research, develop a scenario in which the Persona seeks to accomplish the critical task.
4. Identify Environment and Usage - Where typically is the Persona trying to accomplish their critical task? What are they using to do that? What is their domain expertise?
5. Vet the Persona - Review your draft Personas with your key stakeholders and your top salespeople. Adjust as necessary.

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specific with your tasks. It is very hard to make design decisions when trying to optimize for a set of 7 or 8 unique groups, instead, concentrate on just the top 3 or so.

6. Vet Your Personas – This step is often missed, but is very important. Be sure to confirm with your sales team and key stakeholders whether they believe you have correctly identified your Personas. Don't assume that your first pass of Personas is correct. Ask your top sales team members to review the Personas with you. Have you correctly identified the critical tasks? Are your Personas truly representative of that group of prospects based on the needs, domain expertise and related details? Once your top sales team and other key stakeholders have given you approvals, you are ready to deploy your Personas in your online marketing campaign

7. Use Your Personas – Your Personas can be used to help optimize your online marketing campaigns. Create messaging and creative that directly reaches your Personas, by addressing their needs, concerns and how your product and service can solve their needs. Use the terminology your Personas are comfortable with throughout your campaign. Optimize your buy-flows or order-flows based on their expectations for the interaction. Test variations based on whether the Personas' tasks are helped, and define your success via conversion data. Refine your Personas based on this data, and continue to optimize and test.

## Conclusion, Personas in Online Marketing:

Utilizing Personas as part of your online marketing campaign does take some effort, as you've no doubt noticed! But the results of using Personas to make better informed decisions will be demonstrated in your increased conversions and lower cost per lead and cost per sales metrics. Incorporating Personas and using data to continually test and optimize based on solving your prospects needs is one of the fastest ways to improve your conversion. We've seen this time and time again here at Apogee Results, which is why we start all of our engagements with Persona research and development.

### About Apogee Results

Apogee Results is your complete online marketing company providing professional services across multiple online marketing disciplines. As a large independent marketing services agency we recruit top talent in the areas of search engine optimization, pay per click advertising, social media, website effectiveness, quantitative research and web analytics. Through client collaboration, intense focus on bottom-of-the-funnel metrics, and in-depth industry expertise, we help our customers take their marketing programs to higher levels of performance and effectiveness to generate significant returns on investment. If you need help maximizing your online marketing effectiveness, please contact us.



### Expert Tip:

**When applying your personas, don't forget to focus on what's RIGHT and working successfully. This will help you throughout the refinement process, and is useful knowledge that can be applied elsewhere.**

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