**Customer Persona**

**Example of what to include in a Customer Persona**

|  |  |
| --- | --- |
| **Who** |  |
| Demographics | Male/female/age/income/where they live (rural/suburban) |
| Interests | Social activities, types of sport they like, how they spent their spare time |
| Associations | Who do they follow on social media, places they visit |
| Identifiers | Demeanour – i.e. calm, manic, communication preferences i.e. phone, email, hate being bothered etc. |
| **What** |  |
| Goals | Primary and secondary goals i.e. to get the best returns on my investments, to generate enough money to retire at 60 |
| Challenges | Primary and secondary challenges i.e. limited knowledge of financial planning |
| What can we do | To either help our persona achieve their goals and/or to help overcome their challenges? |
| **Why** |  |
| Typical things they say | About their goals, about their challenges i.e. Why do I need to pay for financial planning advice? How will it benefit me? I worry about running out of money in my retirement |
| Common objections | Why wouldn’t they want our service? i.e. worried about admin fees of moving the investment, worried about the hidden costs of financial advice |
| **How** |  |
| Marketing messages | How would we describe our service to this persona, what are the top messages (i.e. financial expertise in effectively managing your investments) |
| Elevator Pitch | Top message to sell our service to this persona |

**Customer Persona**

**Persona 1 – “Add Persona Name”**

|  |  |
| --- | --- |
| **Who** |  |
| Demographics |  |
| Interests |  |
| Associations |  |
| Identifiers |  |
| **What** |  |
| Goals |  |
| Challenges |  |
| What can we do |  |
| **Why** |  |
| Typical things they say |  |
| Common objections |  |
| **How** |  |
| Marketing messages |  |
| Elevator Pitch |  |