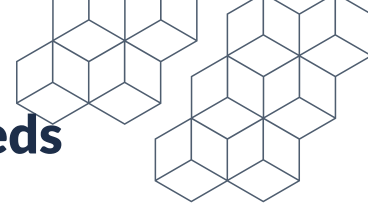


Persona Segmentation Workbook



This workbook is a continuation of the Persona Primer Workbook sent to you prior to this workshop. It's designed to help you build out a profile of your identified persona and align your data with that segment. You'll be completing this workbook as part of our instructor-led, hands-on workshop.



Step 5—Ingredients for identifying persona needs

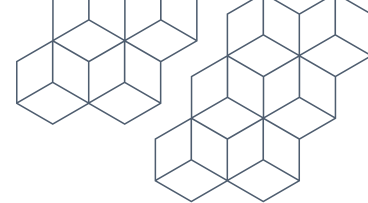
Goals

As part of their everyday roles, list what they're trying to accomplish here? What are their primary responsibilities and intended outcomes?

Challenges

What are their everyday challenges and sticking points? What gets in the way of them accomplishing their goals?





Step 6—Ingredients for identifying marketing content and programming

Opportunity Areas

Based on their pain points, how can you solve their problems? What can you do to help them better themselves, their performances, or their work?

Obstacles for Conversion

What may prevent them from converting? Conversion could mean joining, attending a conference, obtaining CEU, donating, etc.





Step 7—Ingredients for your persona segment

Now it's time to give your data a face. If you're integrating your AMS with your chosen platform (recommended method), you'll want to identify what data is going to map to each of your persona segments within your marketing system. When completing this section, you'll want to assess your persona attributes and identify the data that maps to each. The output of this section is a list of the data and data attributes (queries, reports, views, fields, lists, etc.) you want to sync over from your AMS to your marketing system so that you can activate on that data through your campaigns.

If you have data that could contribute to your persona segment but that data isn't currently in your AMS or integrated, talk to HighRoad. We have some interesting news to share about our product roadmap.

Demographics:

i.e. job function

Source

i.e. Personify

Firmographic

i.e. company size

Source

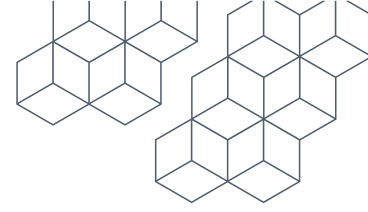
i.e. Personify

Behavioral

i.e. Interested in professional development content

Source

i.e. Cvent, eBiz



Psychographic Inference

i.e. Wants to move up technical ladder

Source

i.e. Cvent, eBiz

Step 8—Identify data gaps

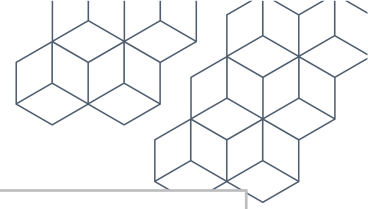
As you pull all the data ingredients for your persona segment, you may identify some notable gaps in data. For instance, through your secondary research, you may assume that your persona has a very specific responsibility as part of her job role, but you don't have the data to validate this. Capture these data gaps/questions in the box below. You'll want to build journeys that fill these gaps, and ultimately, round out your personas even more.

Step 9—Build your persona segment recipe

If your AMS is integrated with your chosen digital marketing platform (recommended method), then the output of this effort is to build the data recipe for your persona. Use this space to include all data criteria for your persona segment. This will serve as a guide when you start to create your segment within your chosen digital marketing platform.

Persona Segment 1

Persona Segment 2



Persona Segment 3

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Persona Segment 4

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Persona Segment 5

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Persona Segment 6

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Persona Segment 7

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Next steps—build your persona journey

Congratulations! You've made it through the most critical step in campaign development! But there's more. Once you've completed this Workbook, there are still a handful of recommended steps you need to take before you officially put your persona into action. Tap into the resources we've provided during—and/or post—workshop. If you're still looking for guidance on how to pull everything together, contact us. We have toolkits and other services that can help walk you through the process.

Contact Us