









## Example Persona 2:

**Name:** Ambitious Andy

**Demographics:** 25, single, moving to better neighborhood

**Behaviors:** Online shopper, lunchtime website browser

**Interests:** Sales and marketing, football, gym.

**Personal:** Oriented to financial success, status.

**Your Business:** Likes detailed information.



## Building a Persona: The Process

How should you go about creating a customer persona?

### Step 1: Information Gathering

Build your persona on the information you gather from surveys, CRM data, sales team feedback, website forms, and other sources. We'll go into this more below.

### Step 2: Give It a Personality

Give your persona, at a minimum:

A Name + Description: "VA Victor" or "Second Home Sue" or "Relocation Reggie"—something that reminds you of their basic motivation to buy a property.



**A Face:** use Google Image Search, pick a photo from stock photography sites. Look for someone who matches your persona in terms of age and general appearance, and then narrow it down to someone who looks like a “Second Home Sue” to *you*.

**Demographic:** give them an age, kids, home, a job. Fill in their basic demographics to match the target segment. Make it specific—they’re 33, not ‘28-44;’ they drive a Honda Accord, not a ‘midsize family car.’

**Needs and Goals:** abstract this from the deeper data you’re going to collect about your customers. What are they looking at real estate for? Why are they considering buying a home? And what problem do they expect it to solve, or benefit will it bring, to their own life?

When you have a persona with a face, a problem, a goal, demographics and some background and other data, you have a person to sell to... not exactly like every single one of your best customers, but close enough that when you create marketing and sales materials, as long as you keep “Second Home Sue” in mind, you’re going to be on target.

## What Do You Need to Know to Create a Customer Persona?

Personas work best when they combine accurate data from marketing and sales, with background information that can give them a human touch.

### **The Basics:**

Building great personas starts with learning some basic information about your best customers.

### **Demographics:**

The first place to start is with the basics of who your ideal customer is. Are they male or female? What’s their age? Can you classify them generationally—GenX, Millennial, Boomer?



Then move onto relationship status, level of education, family size, income, work. Selling to someone who already owns two homes, has a Master's degree and three children and is self-employed is going to be really different than selling to first-time buyers with Associate's degrees and no children.

## **Behaviors:**

Here's where we start to dig a little deeper—don't worry, we'll be going over how you can learn about these aspects of your customers. Behaviors like where they vacation, whether they give to charity, and what they do online can all give you valuable information you can use to understand your ideal customers better and build a more accurate, effective persona.

When you understand who your customers are, and what they do, you're a whole lot closer to knowing who you're selling to, and how to sell to them.

## **Where do you find out?**

Data can be gleaned from your CRM, or from website forms that capture demographic data. Behavioral data can come from sales teams, or from customer interviews and surveys.

## **But Wait, There's More...**

Knowing basic information about your customers is only half the battle. If we're going to construct personas that are useful and help us generate more leads and more sales, we'll need to know a little more.

## **Interests:**

So we know about your ideal customer in demographic terms. But who are they? Most of us wouldn't say that once you know how old we are, whether we're married or not and where we vacation, you know us. We'd say there's more to us than where we went to school or how much we earn. Customers are exactly the same: until we know what they're interested in, what they like, what they care about, we don't know them at all. And if we don't know them, we don't know how to sell to them.



## **Personal:**

Going a little deeper again, what do your customers really want out of life? How does working with you get them closer to that goal? Where are they usually trying to be in 5 years, 10 years?

Suppose you know that your customers are mostly buying homes as investments. What are they planning to use that income for—plow it into a business, or buy a houseboat? Big difference. Talk percentages and investment opportunities to would-be freewheeling retirees and you'll hear the same dull clang in response you'd get if you talked about a life of leisure to an entrepreneur who's looking to launch a new business.

## **Your business:**

How do your ideal customers interact with your business? What do they want out of those interactions? If they could change something, what would it be?

## **Where do you find out?**

Even more than in other cases, deeper data like this is best acquired from customer and prospect interviews and sales team feedback. Checking out forums and social media can yield insights too.

## **Customer Persona Toolkit**

Everything you need to know to create killer customer personas is right here. Laser targeted marketing and sales is within your grasp!

We'll start with the basics:





## Demographics:

<b>Where Do They Live?</b>	
<b>Age?</b>	
<b>Generation?</b>	
<b>Relationship Status?</b>	
<b>Education Level?</b>	
<b>Employer?</b>	
<b>Industry?</b>	
<b>Family Size?</b>	
<b>Homeowner or Renter?</b>	
<b>Other/Miscellaneous</b>	



**Behaviors:**

<b>Technology Adoption: Early or Late?</b>	
<b>Charitable Donations?</b>	
<b>Shopping Habits?</b>	
<b>Financial - Investment? Savings? Businesses?</b>	
<b>Purchase Behavior - What Do They Buy?</b>	
<b>Spending - Credit Card, Store Card, Paypal, Cash?</b>	
<b>Travel?</b>	
<b>Other/Miscellaneous</b>	



Now, let's move on to the deeper questions!

**Interests:**

<b>Professional Interests?</b>	
<b>Entertainment - Movies, TV, Books, Magazines?</b>	
<b>Family and Relationships - Dating, Marriage, Parenthood?</b>	
<b>Health and Wellness - Fitness, Diet, Nutrition, Meditation, Bodybuilding?</b>	
<b>Food and Drink - Eating Out, Favorite Drinks, Cooking, Bars?</b>	
<b>Hobbies and Activities - Arts and Music? Home and Garden? What about pets, politics, vehicles?</b>	
<b>Sports Teams?</b>	
<b>Other/Miscellaneous</b>	



**Personal:**

<b>Long Term Goals?</b>	
<b>View of the Past?</b>	
<b>Mid Term Plans?</b>	
<b>Values?</b>	
<b>Other/Miscellaneous</b>	

**Your business:**

<b>Reason for Buying?</b>	
<b>Concerns About Your Product?</b>	
<b>Concerns About Your Business?</b>	
<b>Expectations of You</b>	
<b>What Factor Would Have Changed Their Decision?</b>	



## About leadPops™

leadPops™ develops lead generation technology and marketing solutions for mortgage brokers, loan officers, Realtors, and insurance agents that are sick and tired of spending money on marketing without seeing results.

Most other companies build websites and landing pages that serve as 'online brochures', but what really matters isn't visits or clicks: it's leads. Our team focuses on creating digital experiences and lead conversion tools that entice potential customers to take action.

As the only Conversion as a Service (CaaS) platform serving the mortgage, real estate, and insurance industries, we help our clients increase sales by converting their anonymous web visitors and into tangible, qualified leads.

With leadPops™, you get the information you need to build relationships and make more sales.

Want to learn more? Go to:

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