How to design an effective customer persona for your business?

Description

Creating a buyer persona (or your ideal customer persona (icp) or avatar) involves 10 steps, including identifying your top customers, giving the persona a face and name, involving staff in the process, refining and testing the persona with input from various departments, and updating it based on feedback **to increase customer focus** and understanding within the organization.

It will help you create improved insights for your ideal customer, help you develop marketing campaigns better, have better briefings to agencies, and better segmenting of your customer base.

- Download a template to create a persona for your business

What is a persona?

Personas are detailed sketches of your ideal customer that help you to better understand your customer and their needs. Having personas on display in your office also encourages your staff to think from the customerâ??s perspective. If youâ??re looking to improve your customer focus, here are 10 steps for creating a persona for your organization:

Follow these steps to build your persona

Step 1 â?? Your ideal customer, where are your A-customers?

To view and review your Customer Relationship Management (CRM) Database, export an Excel file with the top 20% of customers who generate the most revenue and analyze their profiles and order history (if available). Reach out to the sales team to learn about their best customers and discuss their insight. Create a sketch of this information before the meeting.

Step 2 â?? Give your customer a face

Need a photo for your persona? If you donâ??t have one, search through royalty-free images on Google Images. Adding an image to your persona makes it come to life, and even more interesting, use a real photo of your customer, such as one provided by one of your salespeople or service crew.

Step 3 â?? Name your ideal customer

Give your persona a memorable name to make it easier to talk about and remember. For example, Peter Smith, Anne Lundquist, Robert Gonzales, Liu Xu, Alexandrej Stochov, Frederic Delacroix, and Mustafa Cengiz. This will give your persona a more personal touch. Input all the data you have about your persona to create a first draft.

Step 4 â?? Involve Your Staff

Print the incomplete version of your persona on an A3 or A2 paper sheet. Invite your staff, including service and sales personnel, to provide feedback using post-it notes. This session is sure to be enjoyable, and bring positive energy to the team. Use interviews or group discussions to get their input on the persona. This will be incredibly informative, as the staff can provide personal experiences of customer interactions.

Step 5 â?? Work it out further

Use any feedback youâ??ve received and supplement it where possible. This creates a â??richerâ?? image. You will notice that the persona begins to live now. For example, create the elaboration in Adobe Illustrator or Adobe Indesign, so that you can make it even better visually, and also in your brand style. Then print out in fullcolor on an A3 in portrait format.

Step 6 â?? Test the second version

Show your detailed 2nd version to your sales staff again. You can get it a bit sharper this way. Update the persona (s). Also check with the service staff, they often have the most interesting â??customer problemsâ??. By talking to your sales force, service crew, and reception (which often sees most of the people), the persona acts as a trigger to discuss desired customer-oriented behavior. This immediately increases all customer focus awareness among your staff. Then update the latest feedback on your persona.

Step 7 â?? Get nice frames for office display

Get some A3 or A2 frames from IKEA, MediaMarket, or a graphic specialist store in your area. (Art Supplies Stores might do the trick). We ourselves have good experiences with these lists. Beautiful color print insert and ready to hang on the office walls.

Step 8 â?? Make a small presentation to management and staff

A small formal moment with a handover and a photo (perhaps for your social media, Facebook or Intranet) makes it complete. Your meeting will be enhanced by this. Include the

digital version in your (online) marketing plan, business plan and service manual.

Step 9 â?? Hang the persona on your office wall

Take a look around your office. Say for yourself, really, whatâ??s hanging on your office wall now.? Look around. A calendar? Project planning? Old notes on a whiteboard? An image of the business premises, or the real wishes of your customer? Enrich your office wall with a poster or framed image of your customer. A2 works slightly better than A3, because the viewing distance is often a bit further (a 2-4 meters distance).

Print it out on A2 or A3, in color, frame it, and attach it (at least) to your office or workplace. This way you can look at it every day and **refer to it during discussions**. We have often seen it work well and effectively this way. Like, what could Peter think of this proposal. This enables you to get more feel for customer decision making of your ideal customer.

Adding custom stickers can bring your presentation to life and encourage more interaction. This combination not only adds a touch of life to your office walls, but also makes your client profiles more three-dimensional and easier to understand. By applying custom stickers with different styles, themes, or keywords to colored paper, you can create a visually impactful and inspiring client wall.

You can design and produce these custom stickers through the GSJJ quick customization platform. They are durable and visually appealing. Combining custom stickers with colored paper allows for a more creative client portrait display, allowing your team to stay connected to their ideal clients throughout their daily work.

Step 10 â?? And ready, enjoy!

Now your persona is on the wall. In your field of direct sight. Now, when you have a meeting and talk about your customer and customer satisfaction, walk over to it, show it, and use it directly in the conversation.

You might notice this effect:

- Slow impact, but better guidance for decisions.
- Improvement of marketing material with better and sharpened customer insights
- A few â??okâ?? nods from service and sales reps (thatâ??sâ??my customer, which I spoke with today!)
- Helpful briefing material for agencies to develop campaigns (just send the persona as input for a website redesign project)
- After a year, it is still valid!

When decisions are made, sometimes the customer is forgotten in the heat of the discussions. At that point, it can also be useful to think â??*What would our customer, Peter, think of this*?â?• when making decisions. â??Look here it hangs on the wall â?¦ Letâ??s walk over to it.â?• This makes the discussion a bit more pleasant, focused and lively.

A persona has a strengthening and time-saving effect during creative briefings.

When you have a persona, you can use it well in briefings for marketing campaigns. You have now described your target group well, and this helps to guide the briefing process in advance. You donâ??t have to search for what to tell the creative party every time, you can now just give them the persona. Handy for your website development or product development.

Your advertising agency will be happy with it, and it will certainly save you time having to tell it all the time. The creative party has a nice handle with a persona.

Improve your Customer Touch Points.

After creating a persona, you can begin tackling customer journeys and **customer experience.** How does the customer (or this persona) travel through your buying process? For example, is it easy to request a whitepaper via the website? Is the phone answered quickly when a mobile call is made? How is the customer helped with an e-mail to the service, what about Whatsapp? A persona makes it more pleasant and easier to make design decisions. It greatly helps to improve your customer insight. It is a useful means to further refine your business management process.

Looking at the Customer Journey with different eyes.

When you have worked out the persona properly, you can now also see through the eyes of this persona, namely how he / she experiences your company in the different steps of the

customer journey. The first contact, the search for solutions on the internet, your contact with service or sales, what preferences he / she has, in short, the entire customer journey or the customer journey. What does the contact with sales look like on a mobile phone, or the confirmation of your quotation by email? All contact points (touch points) that the customer has with your organization. This clear graphical display is called a Customer Journey analysis. With the persona you can empathize much better with the steps that your customer experiences.

Of course, all of your customers are different, but having one or more relevant personas helps greatly improve your customer focus. We did this for a few clients â?¦ it is now shining in their office.

Facts about Buyer Personas

1. Companies that use buyer personas generate 2â??5 times more effective marketing results.

Personas help tailor messages to real customer needs, increasing engagement and conversions.
Reference: HubSpot â?? The Ultimate Guide to Buyer Personas
https://blog.hubspot.com/marketing/buyer-persona-research

2. 71% of companies that exceed revenue and lead goals have documented buyer personas.

Well-defined personas support better-targeted strategies across marketing, sales, and product development.
Reference: Cintell â?? Understanding B2B Buyers Report
(Cited by HubSpot and in buyer persona whitepapers)

3. Buyer personas improve email click-through rates by up to 14% and conversion rates by 10%.

Personalized content based on personas makes outreach more relevant and effective.
Reference: Aberdeen Group â?? The Power of Personas
(Cited by MarketingSherpa and HubSpot)

4. Only 44% of marketers actually use buyer personas consistently.

Many companies recognize their value but donâ??t apply them regularly, missing strategic opportunities.
Reference: ITSMA â?? Marketing Strategy Reports
https://www.itsma.com/

5. Effective buyer personas are based on research, not assumptions.

Using real dataâ??interviews, surveys, and analyticsâ??leads to more accurate and useful personas.
Reference: Content Marketing Institute â?? Persona Development Best Practices https://contentmarketinginstitute.com

FAQ

What is a buyer persona and why do I need one?

A buyer persona is a semi-fictional profile that represents your ideal customer based on real data and research. It helps you tailor your marketing, sales, and product decisions to better meet customer needs and expectations.

How do I create a buyer persona?

Start by researching your existing customers through interviews, surveys, and analytics. Then, group shared traits like goals, challenges, behavior, and demographics into clear profiles you can use across your business.

How many buyer personas should I create?

Most businesses start with 2â??3 core personas that represent their main customer segments. Focus on quality over quantityâ??create only as many as needed to guide your key marketing and product decisions effectively.

Good luck creating a perfect persona for your business!

- Download a template to create a persona for your business
- Download a marketing plan template to start building your marketing strategy

Category

1. Business Ideas
2. Learn Business Concepts
3. Business Intelligence
4. Marketing
5. Market Intelligence

Tags

1. Market research
2. Business Strategy
3. Branding
4. Customer Insights
5. Customer Persona

Date
10/12/2026

Author
huubster