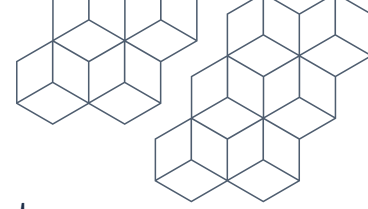


Persona Primer Workbook



This workbook is designed to walk you through the process of categorizing your membership and building intelligent, data-driven persona segments around those categories. As such, this exercise is a hybrid of both audience segmentation and persona development.

We ask that you complete this workbook to the best of your ability prior to joining our workshop on June 18. While you'll still be able to participate in the workshop if you're unable to complete it, completion of the workbook will help you maximize your time with us even more.



Step 1—Segment your audience

First, you want to identify patterns that would indicate needs for separate personas. In other words, what are traits that have the most impact in terms of content consumption—both marketing content (free) and program content (paid).

For instance, if you work for the American Marketing Association (AMA), it may not make as much sense segmenting by Job Function. It's assumed that your membership is composed of mostly marketers. You may, however, divide by Discipline/Specialty since marketing, as a profession, is a broad space. You may also divide it by Industry/Vertical since tech marketing may be drastically different than food marketing. As such, they may look for content specific to those areas. Once you determine the biggest patterns in terms of content consumption, you can start segmenting your membership into categories. This is called your Persona Matrix. While there are always exceptions, most persona matrix' are between 5-7 categories.

This section of the workbook represents common segmentation patterns within associations. Consider the patterns below and assess what category—if any—is a fit for your organization. If one of the categories is a fit, use the text space to fill out more detail about that category. If the categories below don't make sense for your organization, use the Other section to identify the category that's a better fit.

Career Level (i.e. manages a team)

Descriptions

Counts

Revenue Tie



Generation (i.e. Gen X)

Descriptions

Counts

Revenue Tie

Job Function (i.e. marketing)

Descriptions

Counts



Revenue Tie

Discipline/Specialty (i.e. SEO & Content)

Descriptions

Counts

Revenue Tie

Descriptions

Counts



Revenue Tie

Industry/Vertical (i.e. medical)

Descriptions

Counts

Revenue Tie

Geography (international)

Descriptions



Counts

Revenue Tie

Other

Descriptions

Counts

Revenue Tie



Other

Descriptions

Counts

Revenue Tie

Step 2: Build Your Persona Segments

This section of the workbook is designed to help you align the right data points with your personas. Note that these are the ingredients for building and syncing the fields, filters, lists, views, queries, reports, etc. for your persona depending on your platform(s).

Demographics:

Age/Generation

Gender

Educational Level

Firmographics:

Industry

Annual Revenue

Company Size



Income Level

Geography

Job Function/Level

Family/Marital Status

Access these resources to help you fill out the information below:

Persona Building Playbook: Step-by-step instructions on identifying and building personas.

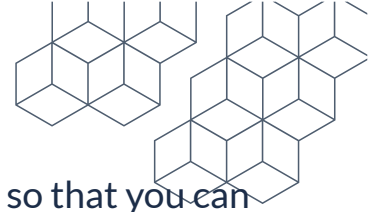
Persona Building Toolkit: Listicle on the fundamental tools needed to build out your profiles.

Step 3—Align Content Format & Messaging

This section of the workbook is designed to help you identify the right content format, tone, and positioning for your personas.

Soft Skills/Attributes

What are their work styles, personality traits, proficiencies and/or gaps?



Section 4

This section is designed to help you build a hierarchy for your personas so that you can identify what persona you want to prototype for our workshop. It's your opportunity to organizationally weight your resources, timing, and efforts according to the persona who's mostly likely to engage with you. Use the data you input into the steps above to complete this step.

Which persona has historically brought in the most revenue?

Which persona would get the most out of your current offerings (not tied to revenue—tied to overall year-round engagement)?

Which persona has the highest in terms of needs?



Next Step

Persona-building Workshop on June 18 at 1:00pm ET

Once you've completed this primer workbook, we'll get into the remaining persona building categories during our workshop. This will get you one step closer to building out your content strategy.

