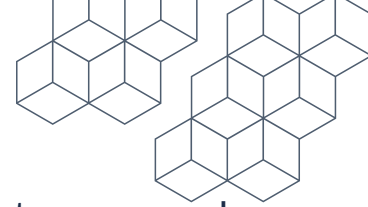# Persona Segmentation Workbook

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.

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
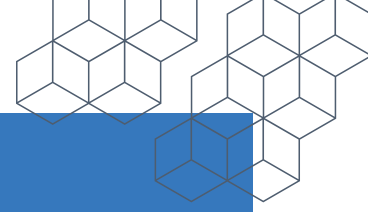
Revenue Tie

Generation (i.e. Gen X)

Descriptions
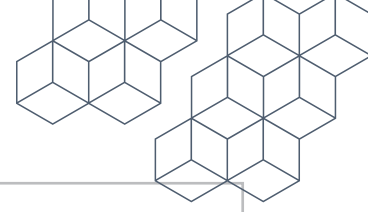
Counts

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 profiles

This section of the workbook is designed to help you explore the needs of your identified personas, so that you can turn those needs into solution-based content. The output of this section is one solidified persona profile, however, you can re-use this section of the workbook to complete all of your persona profiles. Note that building your content strategy around your personas is interdependent and subsequent to this exercise.
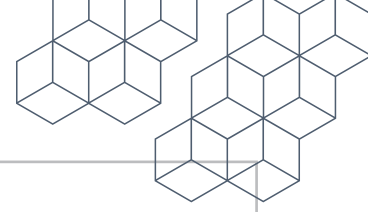
Demographics:

Firmographics:

Age/Generation

Industry

Gender

Annual Revenue

Educational Level

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.

Soft Skills/Attributes

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

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?

Opportunity Areas

Based on their pain points, how you can 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 3—Assign data to your persona segments

Now it's time to give your data a face. If you're integrating your AMS with your chosen email platform, and you've gotten to this step, you'll want to identify what data is going to map to each of your persona segments within your email marketing system. This could be a mix of all data categories depending on what data you've collected to date. When completing this section, it's recommended that you go through each persona individually and identify the data that maps to each. The output of this section is a list of the data and data attributes (views, fields and/or lists) you want to sync over from your AMS to your email system so that you can activate your 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

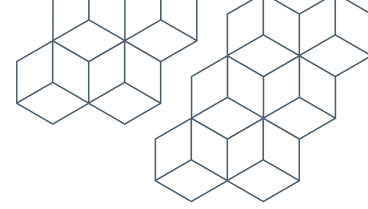i.e. Personify

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 4—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 5—Create dynamic lists for your persona segments

If you're integrating your AMS—or have already integrated your AMS—with your chosen email platform and you've gotten to this step, the output of this effort is to create synced dynamic lists that you can use for each of your persona segments. Use this space to include all data criteria for each of your persona segments. This will serve as a guide when to start to create your dynamic lists.

Persona Segment 1

Persona Segment 2
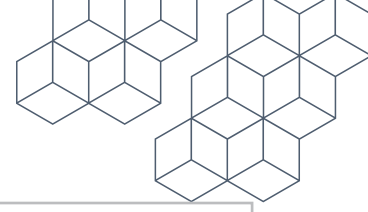
Persona Segment 3

Persona Segment 4

Persona Segment 5

Persona Segment 6

Persona Segment 7

Step 6—Prioritize your persona segments

This section is designed to help you build a hierarchy for your personas. 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 Steps—Build your content strategy

Once you've completed this Workbook, you can start developing your content strategy based on your persona segments. If you're unsure how to develop your content strategy, contact HighRoad Solutions. We have Toolkits and other services that can help you with this critical step.