[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

Customer Persona Sheet

This sheet describes one type of customer for [Product, service, or business name] in enough detail that marketing, sales, and product decisions can be checked against a real person instead of a vague audience. A persona is only useful if it rests on research: record the research behind it at the end of this sheet, and review the persona when that research changes.

1. Persona snapshot Persona label: [Persona label: a short descriptive name for this customer type]

One-line description: [One-line description of this customer type]

Role or life situation: [Role or life situation of this customer type]

Quote in their own words: [Quote capturing how this customer type describes their main problem, in their own words]

2. Demographics and background Age range: [Age range of this customer type] **Education level:** [Education level typical of this customer type]

Location type: [Location type where this customer type is concentrated: city, town, rural area, or region type]

Occupation or sector: [Occupation or sector of this customer type]

Household or company size: [Household size or company size relevant to this customer type]

Income or budget band: [Income or budget band of this customer type]

Background summary: [Background summary: career, family, or business context that shapes this customer type]

3. Goals Professional or business goal: [Professional or business goal of this customer type]

Personal goal: [Personal goal of this customer type] Short-term milestone: [Short-term milestone this customer type wants to reach]

How they judge success: [How this customer type judges whether they have succeeded]

4. Challenges and pain points [Challenge or pain point 1 faced by this customer type, with how it affects them]

[Challenge or pain point 2 faced by this customer type, with how it affects them]

[Challenge or pain point 3 faced by this customer type, with how it affects them]

Frustration with current solutions: [Frustration this customer type has with current solutions]

Obstacle to reaching their goal: [Main obstacle stopping this customer type from reaching their goal]

5. Motivations and values [Value or motivation 1 that drives this customer type]

[Value or motivation 2 that drives this customer type]

[Value or motivation 3 that drives this customer type]

What reassures them: [What reassures this customer type when choosing a product or service] **What puts them off:** [What puts this customer type off when choosing a product or service]

6. Buying behaviour How they research a purchase: [How this customer type researches before buying]

Who influences the decision: [People or roles who influence this customer type buying decision]

Who makes the final decision: [Person or role who makes the final buying decision]

Buying trigger: [Event or situation that triggers this customer type to buy]

Decision criteria in order: [Decision criteria of this customer type, in order of importance]

Common objection: [Most common objection raised by this customer type]

Answer to that objection: [Honest answer to the most common objection]

Price sensitivity: [Price sensitivity of this customer type and what justifies a higher price for them]

Purchase frequency: [How often this customer type buys in this category]

7. Channels and communication Channels they use most: [Channels this customer type uses most often]

Channels they trust most: [Channels this customer type trusts most]

Preferred tone: [Tone of communication this customer type responds to best]

Content they value most: [Content type this customer type values most]

Best time or context to reach them: [Best time or context for reaching this customer type]

8. Journey with our offer Awareness: [How this customer type first becomes aware of an offer like ours] **Consideration:** [What this customer type compares and checks during consideration]

[Company name]

Purchase: [What this customer type needs from the buying experience itself] **After purchase:** [What this customer type needs after purchase to stay satisfied]

Loyalty: [What would make this customer type buy again or recommend us]

9. What this persona should change Message to emphasise: [Message to emphasise for this customer type] **Message to avoid:** [Message to avoid for this customer type]

Offer or feature to highlight: [Offer or feature to highlight for this customer type]

Channel to prioritise: [Channel to prioritise for reaching this customer type]

10. Research behind this persona Research sources: [Research sources used to build this persona: interviews, surveys, sales records, or analytics]

Number of customers researched: [Number of customers or respondents behind this persona]

Date of research: [Date the research behind this persona was carried out] **Next review date:** [Date this persona will next be reviewed]

Known gaps in the research: [Known gaps or assumptions in this persona that still need checking]

Sign-off Prepared by: [Full name and job title of the person who prepared this document] **Date prepared:** [Date this document was prepared]

Approved by: [Full name and job title of the person who approved this document] **Date approved:** [Date this document was approved]