

BUYER PERSONA

Phased Implementation Worksheet

Complete one phase at a time. Each phase maps to a specific data source.

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Persona Image

Implementation Roadmap

Phase	Focus	Source	Time
1	What you already know	Your memory + CRM	20 min
2	What your customers say	Conversations, reviews, tickets	1–2 hrs
3	What the data shows	Analytics, sales records	30 min
4	Strategic synthesis	Team collaboration	30 min

PHASE 1

What You Already Know

Data source: Your memory, CRM notes, existing customer profiles

Time: ~20 minutes

► Pick one real customer you know well. Fill this out based on them. Rough answers beat blank fields.

Demographics

Persona Name (use a real customer as the model)	
Age Range	
Gender	
Location (city, region, urban/suburban/rural)	
Income Range	
Education Level	
Occupation / Industry	
Family Status	

Professional & Lifestyle Context

Typical day looks like	
Work environment	
Tech comfort level	

Goals & Aspirations

► Write what you believe their goals are. You will validate these in Phase 2.

Primary goal	
Secondary goals	
Long-term vision	

Pain Points (Your Best Guess)

Top 3 frustrations	
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What they have already tried	

PHASE 2

What Your Customers Actually Say

Data source: Sales calls, support tickets, DMs, reviews, social comments, cancellation surveys

Time: 1–2 hours over the next week

► Collect real language. Copy and paste exact phrases your customers use. This is where persuasive copy comes from.

Internal Monologue

Write 1–2 sentences the way this person would describe their problem to a friend. Use their vocabulary, their frustrations, their framing.

In their own words, their problem sounds like...	
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Validate / Revise Phase 1 Assumptions

► Compare what you wrote in Phase 1 against real customer language. Update anything that was off.

Goals: anything to correct or add?	
Frustrations: anything to correct or add?	

Psychographics & Identity

How this person sees themselves matters more than how you see them. Listen for identity language in conversations and reviews.

Core beliefs and values	
How they describe themselves (identity)	
Worldview or philosophy	
Brand affinities (brands they buy and why)	

Objections & Resistance

► Pull these from sales calls, abandoned carts, cancellation reasons, and refund requests.

Common objections (exact wording when possible)	
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What they say when they leave or decline	

PHASE 3

What the Data Shows

Data source: Analytics (website, email, social), sales records, CRM reports

Time: ~30 minutes

► *This phase adds behavioral evidence to the qualitative picture you built in Phases 1 and 2.*

Buying Behavior

What triggers them to seek a solution (look at entry points in analytics)	
Decision-making style (research-heavy, emotional, logical, fast)	
Role in purchase decision (sole, influencer, needs approval)	
Budget sensitivity (low / medium / high)	
Average time from first touch to purchase	

Awareness Stage

Check the stage that best describes where most of your audience sits. This determines which messaging angles matter most.

Unaware (does not realize a problem exists)	
Problem-aware (knows the pain, exploring options)	
Solution-aware (knows solutions exist, comparing)	
Product-aware (knows your product, evaluating)	

Where to Find Them

► *Use your analytics to confirm where traffic and conversions actually come from, rather than guessing.*

Online

Platforms (confirmed by data)	
Content they engage with	

In Person



Events, spaces, and communities

PHASE 4

Strategic Synthesis

Data source: Team collaboration (sales, marketing, customer success)

Time: ~30 minutes with your team

► This is where the persona becomes actionable. Bring your team together and complete this final phase collaboratively.

Messaging That Resonates

Emotional drivers (fears, desires, aspirations)	
Language and tone they respond to	
Trusted information sources (people, publications, institutions they believe)	

Preferred Communication Channel

How does this person prefer to receive marketing and sales messages? This is separate from where they consume content.

Preferred channel (email, DM, phone, text, other)	
Notes on communication preferences	

One-Paragraph Summary

► Condense everything above into a single paragraph your whole team can reference. This is the version that gets pinned in Slack and taped to the wall.

Summary: Who is this person, what do they want, what stands in their way, and how do they make decisions?	
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Team Assignments

Assign ongoing ownership so the persona stays current.

Demographics & lifestyle owner	
Pain points & objections owner	
Buying behavior & data owner	
Messaging & channels owner	



Quarterly review date	
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