

PSYCHOGRAPHIC PERSONA

Phased Implementation Worksheet

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

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Implementation Roadmap

Phase	Focus	Source	Time
1	Your gut-level knowledge	Memory, past conversations, intuition	20 min
2	Their actual words	DMs, calls, reviews, comments, tickets	1–2 hrs
3	Patterns in behavior	Analytics, sales data, content metrics	30 min
4	Strategic synthesis	Team collaboration	30 min

PHASE 1

Your Gut-Level Knowledge

Data source: Your memory, past conversations, CRM notes, intuition

Time: ~20 minutes

► Think of one specific person you have worked with or spoken to. Base every answer on them. A real person produces a usable persona; a composite produces a vague one.

Core Identity

Archetype Name	
Current phase of life or business	
What they believe about themselves	
What they want to become	
How they measure personal success	

The Problem (Your Best Guess)

► Write what you believe brings this person to you. You will validate or correct this in Phase 2.

Primary problem that brings them to you	
What they have already tried and why it failed	

Inner World (First Draft)

Core values	
Identity drivers (freedom, mastery, recognition, impact, security, etc.)	
Fears	
Desires they rarely say out loud	

Behavior Patterns

How they make decisions	
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What they procrastinate on or avoid	
What they overinvest in	

PHASE 2

Their Actual Words

Data source: DMs, sales calls, support tickets, reviews, social comments, community posts, cancellation surveys

Time: 1–2 hours over the next week

► Copy and paste exact phrases. Resist the urge to clean up their language or paraphrase. Raw customer language is the raw material of effective copy.

Validate / Revise Phase 1

Compare what you wrote in Phase 1 against what real people actually say. Update anything that was off.

The problem: anything to correct or add?	
Inner world: anything to correct or add?	
What they believe is the root cause of their problem	

Their Language

Two distinct categories: how *THEY* talk about their situation (observational), and what framing from *YOU* would move them (strategic). Capture both.

Phrases they use to describe their situation	
Words and framing that resonate when they hear it from you	
Words and framing that repel them	

Objections & Resistance

► Pull these from declined proposals, abandoned carts, cancellation reasons, and the moments someone almost bought but did not.

Common objections (exact wording when possible)	
Relationship with spending money on this kind of solution	

Trigger Moments



Separate the negative (something became unbearable) from the positive (a window opened). Both create action, but they require different messaging.

Breaking points (negative triggers)	
Moments of opportunity (positive triggers)	

PHASE 3

Patterns in Behavior

Data source: Website analytics, email metrics, social media insights, sales records, content performance data
Time: ~30 minutes

► *This phase adds behavioral evidence to the emotional and qualitative picture you built in Phases 1 and 2. Let the data confirm or challenge your assumptions.*

Awareness Stage

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

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

Content & Attention Profile

► *Use your analytics to see what content actually gets engagement, rather than guessing what should work.*

What stops their scroll (confirmed by engagement data)	
What earns their trust instantly	
What kind of messaging they distrust	
Preferred content formats (long-form, short, visual, analytical)	

Where to Find Them

Use traffic and conversion data to confirm where they actually come from.

Online

Platforms they live on (confirmed by data)	
Niche communities (Discords, Subreddits, Slack groups, newsletters)	

Offline / Real-World

Events they attend (or wish they could)	
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Lifestyle patterns and environments they gravitate toward	
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Buying Behavior

Role in purchase decision (sole, influencer, needs approval)	
Average time from first touch to purchase	

PHASE 4

Strategic Synthesis

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

Time: ~30 minutes with your team

► *This is where the persona becomes a tool your whole team uses daily. Bring the people closest to the customer into the room for this phase.*

Trusted Information Sources

Separate from where they hang out. Who do they believe? Whose recommendation would close a sale?

People they trust (thought leaders, peers, mentors)	
Publications or institutions they respect	
Types of social proof that carry weight with them	

Preferred Communication Channel

How they prefer to be reached for marketing and sales. Separate from where they consume content.

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

Buyer Journey with You

Map how this persona moves from stranger to customer to advocate. This makes the persona actionable.

How they typically discover you	
What makes them engage (follow, subscribe, respond)	
What makes them convert (buy, sign up, commit)	
What makes them stay and refer others	

Alignment Check

Why you want to work with this person	
Green flags (signals of a great-fit customer)	

Red flags (signals of a difficult or poor-fit customer)	
What does a successful long-term relationship look like?	

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 believe, what problem brings them to you, and how do they decide?	
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Team Assignments

Assign ongoing ownership so the persona stays current and useful.

Core identity and psychographics owner	
Language and objections owner	
Behavior and data owner	
Messaging and channels owner	
Quarterly review date	