Step 5:
Profile the Persona for the Beachhead Market

The Persona ensures that everyone is unambiguously focused on the same target
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::: In This Chapter, You Will:
::: Choose one end user from one potential customer to be your persona
::: Profile that person

One of the most fun and unifying parts of the 24 Steps is profiling the Persona for the beachhead market. Your Persona is one end user from one potential customer who best exemplifies your End User Profile. The Persona makes your target customer unambiguous and tangible so that all members of the founding team, and all employees, are all focused on the same goal of making your target customer successful and happy. Rather than guessing what potential customers might want, you focus on what this one end user wants because you know the person well, and the person represents your target customer.

Those of you with a marketing background are likely familiar with the concept of a persona, using a generic name like Mary Marketing or Ollie Owner as a composite of what the marketing team thinks the typical customer is like. While even a generic persona can be helpful, I take the process even further. The Persona should be a real person, not a composite.

By choosing an actual end user as your Persona, your Persona is concrete, with no room for second-guessing. Did your target customer go to college? Would your target customer be interested in a puppy? Does your target customer prefer a closed software ecosystem like what Apple’s iPhone provides, or an open ecosystem like the Android mobile operating system, or does your target customer simply want to check email reliably on the go? You can debate these questions internally, but if your Persona is a real person, there is only one right answer.

No one end user represents 100 percent of the characteristics of every end user in your End User Profile. But as you work toward choosing your Persona, you will find someone who matches the profile quite well. You will then focus your product development around this individual, rather than the more-general End User Profile.

How to Choose and Profile Your Persona

The process to choose a Persona is important, so you should involve all the key members of your team, regardless of their business background. Team members who are involved in the process, even if they do not think they have a lot to contribute, will end up enjoying, embracing, supporting, and getting a lot of value out of the Persona. They will feel ownership and understand the nuances of the Persona that might not get written down, and gain appreciation for the other members of the team and their perspectives.

If you already have sales, an analysis of the most successful customers to date would be very valuable data. If you have not sold any product yet, then look at the primary market research you have already
done, and analyze some of the customers who showed the most interest in your potential offering. Make sure they would actually pay for it and are not “just interested.” There is a big difference.

You are looking to answer the question, “If I had only one end user to represent our End User Profile, who would it be?” From your End User Profile, you have a good start, and the Persona should conform very well with that profile while also increasing the specificity.

Your team should take the primary market research you have on some of these customers, as well as the End User Profile, and discuss the strengths and weaknesses of making each customer the Persona.

Then, prepare a fact sheet about the Persona, based on the information you already have. Include a drawing or photograph of the individual! You will typically want to include information about the person’s home life (born, raised, education, family, age, etc.) as well as the person’s job (what company, how many years, training, managers, salary, performance metrics if a B2B case, etc.). By preparing a fact sheet, your team will also identify key facts specific to your business that you will want to include in order for the Persona to be useful to you.

Most importantly, you want to list the Persona’s Purchasing Criteria in Prioritized Order, as these priorities will dictate what purchasing decisions the Persona makes. You will build off of this list throughout the 24 Steps. You cannot necessarily believe whatever the end user tells you; you should validate what they say, but a list provided by the end user will get you started. Often the end user actually believes what they are saying, but will take very different actions.

In your fact sheet, you will also use the person’s real name. It might seem a bit creepy to use a real name, so if you feel uncomfortable, you can use an alias instead. I find, however, that once people understand the purpose and role of the Persona, they are okay with using a real name.

Now that you have identified what facts you have and don’t have, interview again the end user who is your Persona (you presumably have already met the individual at least once in the course of your primary market research) and fill in the gaps in what you know. Allow the conversation to be open-ended because you will likely learn additional facts that are relevant to your Persona. Add this information to the fact sheet in another team meeting to make sure everyone is on the same page and that no crucial details have been omitted or overlooked.

Once you have finalized your fact sheet, summarize a few key areas on a sheet of butcher paper, and post it on the wall so that your team does not forget who they are in business for.
Making the Persona visual means everyone on your team will be more engaged in the process and will keep the Persona in the front of their minds.

The Persona is More Than Just an Exercise

The value of the Persona persists well beyond the completion of this step. The Persona should become a touch point as you think about decisions going forward. What features should you prioritize? Drop? How should you allocate resources? Who should you hire to sell the product? What should your message be? Who should you partner with? Where do you go to meet your customers? Who is influencing your customer’s mindset on your product?

All of this can and should be guided by your specific understanding of the target market which is very effectively done through your Persona. Some successful companies make a cardboard cutout of the Persona and keep it in the office. Other leading-edge companies pull up an electronic version of the
Persona when making important decisions in order to discuss what the Persona’s perspective would be on the subject.

You may also find that you made errors while developing your Persona fact sheet, or that your Persona does not adequately represent the End User Profile, so you may need to go back and revise your Persona in an iterative fashion.

The point is that the Persona build is not a one-time event but rather should be visible or at least accessible to all members of the team as you move forward with your business. It should be your North Star.

**Do I Get to Have Multiple Personas? If So, When?**

Companies such as eBay and Google start out with two Personas. This is not because of a lack of focus, but rather because their core businesses are two-sided markets, so they needed one Persona for each market. For example, eBay would have one Persona for a buyer and a completely different Persona for a seller. Likewise, Google would have one Persona for a search user and another Persona for a buyer of advertisements.

However, eBay and Google are so large today that they have many personas to match the many areas of their business. Sometimes, entrepreneurs like to point to eBay and Google as reasons why they too can have multiple personas. However, large companies have the resources to cover multiple markets and use multiple personas. You do not have this luxury, so don’t be led astray by what large companies do with personas. Focus on your one Persona, or if you have a multi-sided market, one Persona for each side of the market.

**Example**

**Mechanical Water Filtration Systems Persona Example (B2B)**

This team had a water filtration system that they thought could be best deployed in a beachhead market of cooling data centers, specifically those at large companies or real estate entities that manage large data centers shared by multiple clients. The TAM was calculated to be $50 million per year with a compound annual growth rate of 20%, so it was an attractive and properly sized market but one that would rapidly attract competitors as well. As such, the team needed to be focused and conquer this market quickly.

The team initially thought the end user would be the data center manager, but their primary market research found the actual end user was the facilities manager who reports to the data center manager. The facilities manager also controlled the budget that would purchase a water filtration system. After a half-dozen interviews with facilities managers at these data centers, the team was starting to get a clear picture of the end user.
The team eventually decided that one of the potential end users, Chuck Karroll, best represented the facilities manager they were trying to sell to. *(I have changed his name and some of the details to anonymize him.)*
**Persona: Chuck Karroll, Facilities Manager, IBM NE Data Center in Littleton, MA**

<table>
<thead>
<tr>
<th>Environment</th>
<th>Now has just over 20K Blade servers today growing at 15% per quarter for the past two years and for the foreseeable future</th>
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| Personal Information | • He is second-generation American (parents from Ireland)  
• Born in Medford, Massachusetts  
• Medford High to Middlesex Community College  
• Moved to Winchester  
• Family with 2 kids (12, 15)  
• Just turned 40 this year |
| Career Context | • Mid-career, 18 years at IBM and not looking to leave  
• He is technical but in the technician sense and not the engineering development sense  
• He is maintenance-focused and his vocational degree is relevant  
• Been in current job for 5 years and has had three different managers already but hopes to keep job for next 5 years at least  
• Promotion path forward is to manage more facilities  
• Makes $65K per year and has the potential for a 5% bonus at the end of the year based on the unit’s overall performance and his contribution as determined by his boss, the data center manager.  
• Eligible for salary increase each year based on his appraisal (can be between 0% and 12%)  
• He has been consistently ranked a 1 or 2 (on a scale of 1-5 where 1 is the best) in his yearly performance review, with reliability and supporting the business unit’s growth as two key metrics upon which he is rated |
| Information Sources | • Not big on websites yet  
• Belongs to AFCOM (association for data center management types) and gets a lot of information from them and especially likes to go to the Data Center World conference in early October each year in Las Vegas.  
• Second-biggest influence is the Uptime Institute  
• Been starting to look at Green Grid but not impressed  
• Also starting to get forwarded email about a blog (Hamilton and Manos) that other influential facilities managers are starting to read, and he has recently bookmarked it himself |
| Purchasing Criteria in Prioritized Order | 1. Reliability (highest priority)  
2. Growth (high priority)  
3. Costs (medium priority)  
4. “Greenness” (low priority – extra credit) |
| Other Noteworthy Items | • Drives a Ford F-150 pickup truck & always buys American  
• He wears a beeper that is always on  
• Listens to country music  
• He used to be a volunteer fireman and he is proud of it and keeps the mentality of when there is a crisis, he needs to act fast and go put out the fire |
Notice how you can very much visualize Chuck from these details.

Chuck’s background helps the team understand the social pressures and incentives he faces. His career information helps them understand his performance incentives – promotions, wages and recognition – and how established he is at the company. They also understand where he gets his information from, which is important because Chuck will be vetting everything that the team tells him against these sources.

These are not generalizations or assumptions based on stereotypes. These observations are based on talking directly with Chuck, and with other end users who validate these observations for the beachhead market. Not every volunteer firefighter will identify with Chuck, but most data center facilities managers in this beachhead market will have a similar mentality even if they don’t have a beeper or aren’t members of the volunteer fire department (although a surprising number of them do and are).

Chuck’s priorities in making purchasing decisions are especially important to the team. When the team first started, they believed their unique selling point was being environmentally friendly, but their primary market research showed that Chuck cared about reliability, not reducing his carbon footprint. Sure, there was a lot of talk about “green data centers” but that was a nice-to-have, not a must-have. What would get Chuck fired first and foremost was the data center having outages, because his customers (higher-ups in his own company) and his customers’ customers (the actual paying end customers) expected the data center to be as reliable as an electric utility. If the system went down, Chuck’s phone would immediately ring and it would not be pleasant. In fact, it could be the CEO of his business unit, who was generally nice but was Frankenstein’s monster when the system was down. This was Chuck’s biggest fear in life and he would do whatever necessary to make sure that there were no outages.

After this number-one priority, meeting the business unit’s growth objectives was number two because the general manager of the business unit was a very influential person and wanted to make his numbers and keep getting promoted. This could only be done if the data center continued to grow. If Chuck did not meet these growth goals, the pressure would come down from the business unit manager to Chuck’s manager (the data center manager) and Chuck would be in jeopardy of being replaced.

Chuck’s third priority was to not exceed his budget, which would impact his performance review. He was much more likely to get fired as a result of reliability or meeting growth objectives, but staying within budget was important as well.

Environmental issues ranked only fourth in his priorities. He had to be conversant in green issues, and would put together an annual email to his manager and the center’s new “green guru” about environmentally friendly steps he was taking, but doing well on environmental issues was considered the way a student considers an extra-credit problem on a test – nice to have, but not the main thing.
Summary

The Persona is extremely helpful to create specificity within your beachhead market. You are now selling not to some “end user profile,” but to a specific individual. Your whole team should be involved in this process to ensure everyone is on the same page and truly understands the Persona so they can maintain a customer-based focus. A major category of the Persona is the Purchasing Criteria in Prioritized Order. Really understand your customer and what makes them tick not just at a rational level but also at an emotional and social level. Walk a few miles in their shoes and then you will be much more successful making a product and a new venture to serve them. Once you have made a picture or visual of your Persona and fleshed out the fact sheet, make it all visible within your business so that everyone works toward the same common goal.
The Journey for the Holy Grail of Specificity diagram should now make a lot more sense to you. But you are only five steps in. Throughout the remainder of this book, you will maintain and sharpen your focus as you define what you can do for your Persona.