The Importance of Developing Conversion-Based Personas

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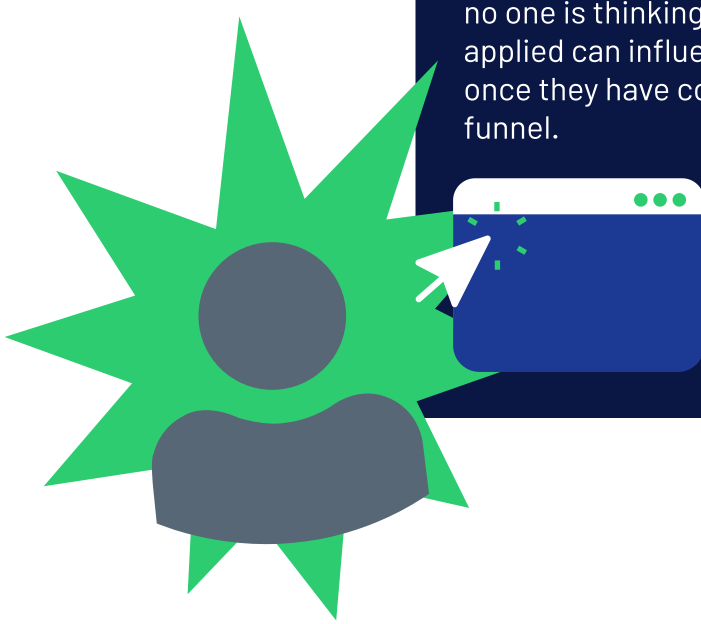
Introduction

Whenever we engage with a new client, one of the very first pieces of information we are presented with is their target audience personas. Typically, they constitute the varying characteristics of who it is we are looking to target via attributes such as interests, challenges, lifestyle attributes, wants, desires, and more. We then use these personas to hone both the strategies we develop and the tactics we'll then deploy on their behalf. The truth of the matter is that both clients and agencies tend to put a lot of stock into these personas, as they have typically been vetted via a thorough research process and are believed to help us all truly get inside the mind of our desired target.

However, while these "Target Personas" are a great aid when it comes to campaign strategy and planning, they often do not address what is one of the most important aspects of the marketing supply chain…the "Conversion-Based Persona."



What is a Conversion-Based Persona?

Simply stated, it's the mindset of your target user once they have converted and entered your funnel. Are they looking to buy? Are they looking to get educated? Are they just looking for top-level information? In short, the post-conversion mindset of a user, once they have decided to engage, can have a considerable impact not only on campaign ROI but also on your post-conversion nurture and sales tactics as well.

Unfortunately, while almost all marketers spend a lot of time focusing on their "Target Personas," few give much thought to their "Conversion-Based Personas." As a result, this can often lead to problems around lead quality or misaligned expectations around campaign results and what is expected to be achieved. The reason is that most marketers assume that if you understand your target persona, you will connect with the right people, and those people will immediately turn in marketing-qualified or sales-qualified leads and opportunities.

While this certainly does happen, one reason campaigns often come up short, or the quality of the lead does not meet expectations, is that no one is thinking about how the tactics being applied can influence the mindset of the user once they have converted and entered your funnel.

How Can You Develop Conversion-Based Personas?

It all starts with the offer.

Yes, the bait you use to hook and ultimately convert your target significantly impacts how a user's conversion-based mindset will be shaped and defined. Therefore, it's essential to look at the nature of what you are offering and the type of post-conversion user mindset it will create. Specifically, if your offer is a categorical white paper, while it may generate good volume, those people may be very early in their research process and not necessarily ready to speak to a salesperson. Conversely, if your offer is "Get A Quote" or "Get Plans and Pricing," while your volume may be smaller, you're likely connecting with someone who has done their research, is further down the funnel, and wants to speak with a salesperson. As you can see, the offer you put forth has a considerable influence on shaping the user mindset and how they will look to engage with your organization post-conversion.

It's also vital to realize that the conversion-based persona is not just shaped once the action has been completed and the user has entered your funnel. Rather, the conversion-based persona is shaped from the moment the user is impressed and throughout the entire conversion process thereafter. Specifically, the moment the user sees your message and decides to engage with your offer, whether you realize it or not, they are not only indicating that they are interested in your organization but also where they are in their decision-making process and how they would like to interact with you in the near-term.

Therefore, it's crucial that when planning campaigns, you not only look at offers in the context of what you can "give." Instead, you should also be looking at offers via the post-conversion mindset that you are looking to elicit from the user and what you feel that offer will generate.

With the above being said, the following are three conversion-based personas that capture three crucial mindsets that can also be applied to virtually any organization.

Conversion-Based Persona #1 – "The Researcher"

The *Researcher* is looking to better *understand* a product, category, and/or solution. They are not necessarily ready to buy or speak with someone but are in the process of accumulating knowledge so that they can start making informed decisions about whatever they have been tasked with doing.

Offers appealing to a *Researcher* could be Top-10 Reasons, Categorical White Papers, Infographics, and the like. The good news about the *Researcher* persona is that there are a lot of them out there, so this is a great opportunity to generate volume. They also tend to be early in their decision-making process and make great candidates for nurturing. Conversely, the challenge they present is that because they are often very high up in the funnel, they must be nurtured, and often, these people are not ready to speak with someone or purchase.

Conversion-Based Persona #2 – "The Student"

The *Student* is looking to get *actively educated* about a product, category, and/or solution. They are further down the funnel in that they have likely done research and are now in the process of trying to educate themselves about a particular product and/or solution to assess its effectiveness and if it truly meets their specific need.

Offers that might appeal to a *Student* are Free Trials, Product Demos, or a more technical White Paper, Solution Brief, or Case Study. While the pool of potential users here does start to shrink, the good news is that you are connecting with a more informed mindset and with someone much further along in their decision-making process. For example, a user who engages with a Free Trial or Demo demonstrates that they have an "active interest" in the product or solution it relates to. However, the challenge *Students* present is that many of them are still mid-funnel opportunities and have not necessarily raised their hand and stated that they are ready to speak with a salesperson or buy.

Conversion-Based Persona #3 – "The Customer"

The *Customer* is looking to talk. They have a higher level of interest that can only be satiated through a conversation with someone about the product, category, and/or solution that they are interested in. However, to connect with a *Customer* mindset, it›s critical that you have an offer that appropriately connects with their interest level.

Offers that can be used to appeal to *Customer* mindset are along the lines of "Get A Quote" or "Get Plans and Pricing." Why? Because folks who are inquiring about cost have likely done their research, gotten educated, and are in the later stages of their decision-making process. Therefore, in this scenario, the user is not only requesting information, but more importantly, they are requesting an engagement. Not only do they want to speak with your sales team, but they also *expect to speak* with them.

Of course, the challenge here is that the pool of prospective users is even smaller at this phase of the journey. Therefore, in addition to lower volume, you will likely see a higher cost per lead. However, what you lose in quantity, you make up for in quality.

Creating Your Conversion-Based Personas

Now that we have defined the various types of conversion-based personas to consider, the next crucial step is to bucket your offers accordingly. Taking this step will ensure that the expectations you have for your offers and the conversion-based mindsets they will produce will be aligned.

For example, suppose you have a "10 Tips Whitepaper" offer but expect that each person who downloads it will be ready to speak with a salesperson about purchasing your product. In that case, you will likely be unhappy with the result. The reason being is that your offer is likely going to appeal primarily to a "Researcher" persona, but what you truly want to connect with is a "Customer" persona. Therefore, by taking the time to look at all your potential offers and assign each to a "Researcher," "Student," or "Customer" conversion-based persona will enable you to better visualize the types of leads you will be generating via the associated user mindset that accompanies each.

By taking the aforementioned step, what you will be provided with is a map of your offers and the conversion-based persona they are each associated with. This map will enable you to better understand the types of leads you will likely be generating, post-conversion nurture tactics to apply, and, most importantly, get alignment with your sales team around the mindset of leads that will enter your funnel. Ideally, you will not only be able to manage expectations but, more importantly, enable your team to proactively prepare for how to engage with the leads being generated and have the necessary tools readily in place to escalate them further along the funnel.

Therefore, when it comes to you creating your own "Conversion-Based Personas," take the following five steps:

1. Inventory all potential offers.
2. Define your conversion-based personas (ex – Researcher, Student, Customer)
3. Assess what you feel is the post-conversion mindset that each offer will provide.
4. Assign each offer to a persona.
5. Select your offer and, thereby, your conversion-based persona.

Taking these steps will not only help you choose an offer that you feel is appealing and works for your target, but also one that connects with the mindset of the type of lead you are looking to generate. In the end, developing *conversion-based personas* will ensure that offers are not only generating leads but, more importantly, generating *quality* leads. You will now be deploying programs that enable you to shape and connect with the type of post-conversion mindset YOU want users/prospects/leads to have upon entering your funnel.

Four Reasons to Talk to Overdrive:

1. Get an expert opinion on how to achieve your marketing goals
2. See real-world case studies showing how others succeed with digital-first marketing
3. Get a realistic look at the costs and elements of a customized program
4. Learn how to improve lead quality through conversion-based personas

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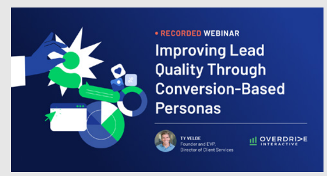

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