WORKBOOK:

Making Customer-Centric Marketing a Reality

Worksheets Included:

- 5-Minute Buyer Persona
- Buy Cycle Insights
- Customer-Centric Interactive Content Planning
- Customer-Centric Website Planning

5-MINUTE BUYER PERSONA

Persona Name:

Functional Role:

Industry:

Business Size:

Possible Titles:

Buyer Type: ☐ Champion ☐ Influencer
☐ Decision-maker ☐ User ☐ Ratifier

Describe persona's role in the buying process:

Top three priorities:

1.	2.	3.

Top three pain points:

1.	2.	3.

Customer-Centric Marketing

BUY CYCLE INSIGHTS

Persona Name:

EDUCATION PHASE	SOLUTION PHASE	SELECTION PHASE
This is the beginning of the journey, where your prospect has just become aware they have a problem. They are starting to look at possible solutions, and trying to learn for themselves what's available.	*This is the middle of the journey, where your prospect is doing heavier research on whether you are a good fit for them. They are evaluating their options.*	*This is the end of the journey, where your prospect is actively considering purchase. They are thinking through what it would mean to be your customer.*
Questions I'm asking: 1. 2. 3. 4. 5.	Questions I'm asking: 1. 2. 3. 4. 5.	Questions I'm asking: 1. 2. 3. 4. 5.

CUSTOMER-CENTRIC INTERACTIVE CONTENT PLANNING

Persona Name:

Buyer Journey Stage: ☐ Education ☐ Solution ☐ Selection

Customer Journey Stage: ☐ Launch ☐ Stabilize ☐ Expand

Key question buyer/customer is asking:

Content plan:

☐ New Content ☐ Modify Existing Content: _____

Interactive content type:

☐ Data Visualizer ☐ Assessment ☐ Demonstration

Our proof point:

☐ Calculator ☐ Selector/Configurator ☐ e-Commerce

☐ Gamification ☐ Other: _____

Describe the interactive content:

Information I'd like to know about the buyer/customer:

How will I use this information?

☐ Lead qualification ☐ Lead nurture ☐ Sales conversations

Where does this live?
(Website, partner portal, landing page, etc.)

How will I capture this information?

CUSTOMER-CENTRIC WEBSITE PLANNING

Persona Name:

EDUCATION PHASE	SOLUTION PHASE	SELECTION PHASE
Question:	Question:	Question:
Content Need: ☐ Modify Existing Content ☐ New Content Theme: Purpose:	Content Need: ☐ Modify Existing Content ☐ New Content Theme: Purpose:	Content Need: ☐ Modify Existing Content ☐ New Content Theme: Purpose:
Format: ☐ Blog ☐ Ebook ☐ SlideShare ☐ 1-sheet ☐ Infographic ☐ Video ☐ Webinar ☐ Webinine (9-minute webinar) ☐ Interactive Content ☐ Other:_____	Format: ☐ Blog ☐ Ebook ☐ SlideShare ☐ 1-sheet ☐ Infographic ☐ Video ☐ Webinar ☐ Webinine (9-minute webinar) ☐ Interactive Content ☐ Other:_____	Format: ☐ Blog ☐ Ebook ☐ SlideShare ☐ 1-sheet ☐ Infographic ☐ Video ☐ Webinar ☐ Webinine (9-minute webinar) ☐ Interactive Content ☐ Other:_____
Where does this live? (Website, partner portal, landing page, etc.)	Where does this live? (Website, partner portal, landing page, etc.)	Where does this live? (Website, partner portal, landing page, etc.)
Describe personalization: (Industry- or persona-based, real-time personalization, etc.)	Describe personalization: (Industry- or persona-based, real-time personalization, etc.)	Describe personalization: (Industry- or persona-based, real-time personalization, etc.)