WORKBOOK:
Making Customer-Centric Marketing a Reality

Worksheets Included:
- Buyer Persona Quick-Start
- Buy Cycle Insights
- Customer-Centric Interactive Content Planning
- Customer-Centric Website Planning

Buyer Personas: The Centerpiece of Customer-Centric Marketing

Before you can determine how to engage customers, you must get to know them first. And the best way to do that is with buyer personas.

To be effective, buyer personas should be built on insights from customers through first-person interviews.

77%
of the most successful content marketers use personas, as opposed to

36%
of the least successful.
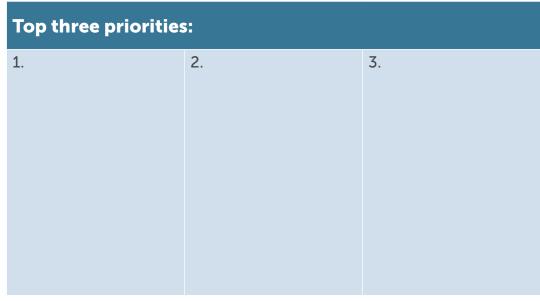
Source: 2018 CMI Benchmark Report

Only
42%
of content marketers are actually talking with customers to understand their needs.

Source: 2018 CMI Benchmark Report

There's no substitute for the insights you can glean from speaking directly with customers about their buying experiences and needs, or for the buyer personas you can create with them. That said, if you aren't ready to take on a full buyer persona project but want to tailor your content, website and marketing to be more customer-centric, this worksheet is a good place to begin!

BUYER PERSONA QUICK-START

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.

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:

Our proof point:

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

How will I use this information?

☐ Lead qualification ☐ Lead nurture ☐ Sales conversations

How will I capture this information?

Content plan:

☐ New Content ☐ Modify Existing Content: _____

Interactive content type:

☐ Data Visualizer ☐ Assessment ☐ Demonstration

☐ Calculator ☐ Selector/Configurator ☐ e-Commerce

☐ Gamification ☐ Other: _____

Describe the interactive content:

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

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.)