How to Build Personas & Positioning that Wins Customers
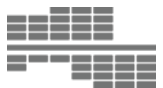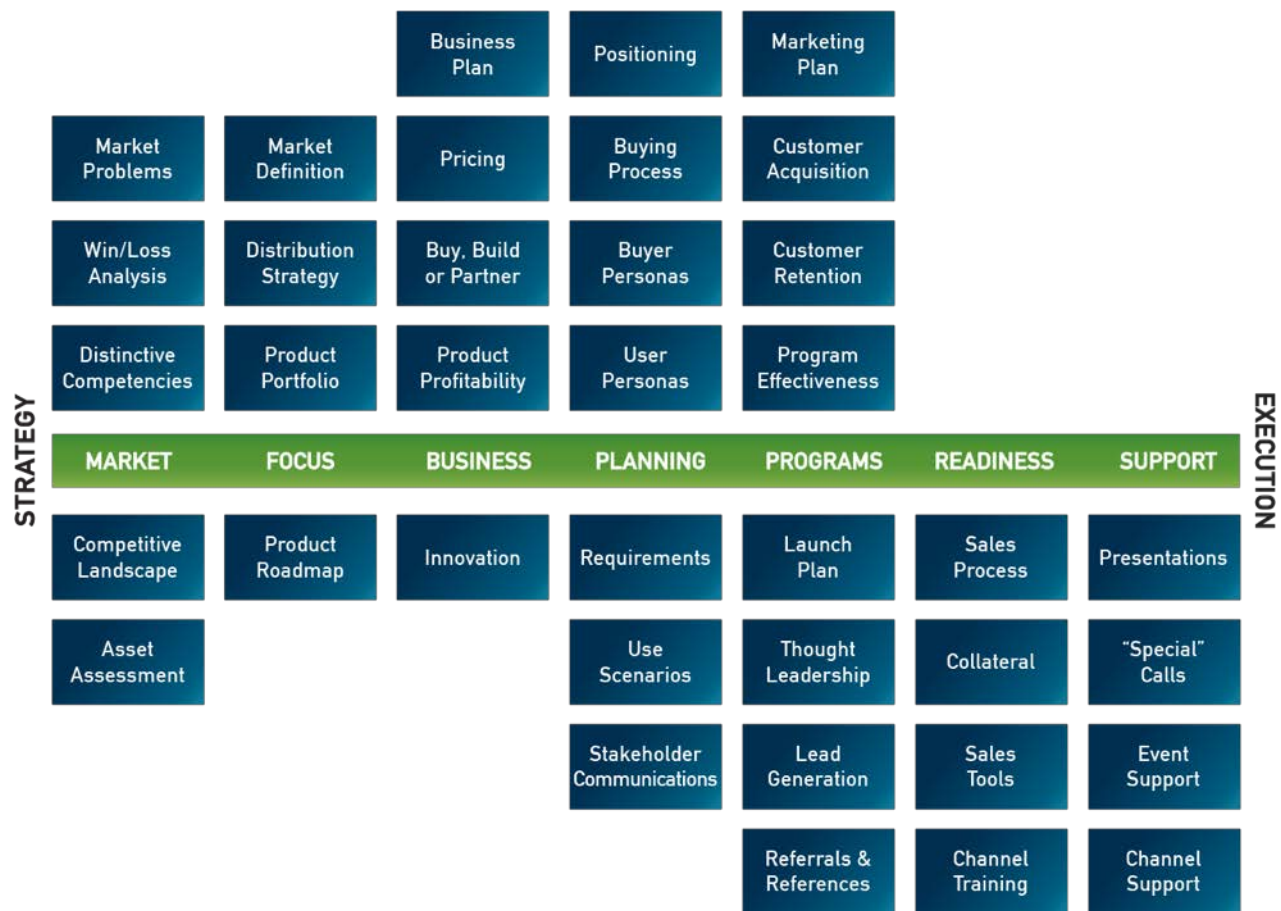
Pragmatic Marketing

Logi ANALYTICS

Josh Martin
Director, Product Marketing
Logi Analytics

about us

Experts in technology product management and product marketing

Specialize in training

Trained hundreds of thousands of people at thousands of companies since 1993

presenter

Josh Martin

Director of Product Marketing at Logi Analytics. He is responsible for developing the user and buyer persona, company positioning, competitive differentiators amongst other activities.

10+ years of developing research service packages which assisted consumer electronics, media and telecom companies in successfully developing mobile application strategies.

Logi
ANALYTICS

Agenda

1. Logi's Challenge

2. Our Solution

3. The Result

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webinar series

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About Logi

- Headquartered in McLean, Virginia

- More than 1,800 customers worldwide

- With Logi, product teams create analytic applications that are purpose-built to users' unique roles and skills and infused within existing workflows and security models.
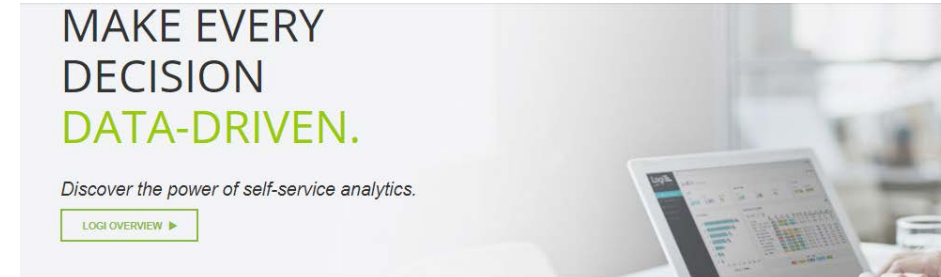
Logi's Challenge

How a lack of focus impeded our success

Our Challenge

- **Wanted to enter the growing data discovery market**
  - Launched Logi Vision in 2015

- **Targeted a wide range of buyers**

  - Developers
  - Product managers
  - Teachers
  - Doctors
  - Construction workers
  - Executives

  - Clergy
  - Lawyers
  - Data analysts
  - CMOs
  - Data scientists
  - etc.

- **Lost focus on core product**

Areas that Suffered

1. Sales execution
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3. Messaging
   - Variety of differentiators for separate personas
   - Inability to clearly articulate our defined value proposition

Our Eureka Moment

- Reviewed closed-won deals and reasons we won

- Analyzed when we were losing opportunities in the funnel

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Eureka! Our market niche was application teams (product managers and developers)

Logi's Solution

Targeting personas that played to our strengths

Persona Development that Works

1. **Defining** Our Buyer Persona

2. **Researching** Our Buyer Persona

3. **Shaping** Our Buyer Persona

4. **Acting on** Our Buyer Persona

5. **Socializing** Our Buyer Persona

6. **Using** Our Buyer Persona

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Defining Our Buyer Persona
Analyze all available data sources

1. Reviewed Salesforce data for direction
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   - Held meetings at our User Conference

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3. Analyzed marketing campaigns
   - Who was reading our material?
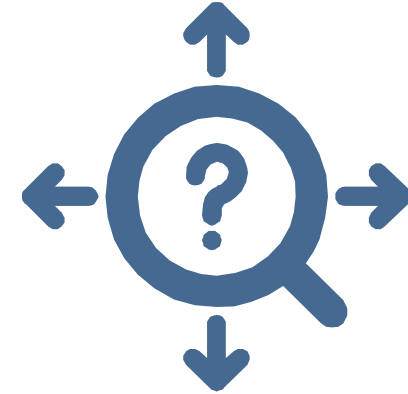   - Who was converting to opportunities and wins?

Researching Our Buyer Persona
The 3-Phase Approach

1. Initial fact finding
   - Use easily accessible sources
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3. Probe for more detail
   - Consider how others will use the information

Researching Our Buyer Persona
Resources Leveraged

Phase 1 – Group Data	Phase 2 – Analysis	Phase 3 – Individual Data
• Social Security Administration Database • Survey data from groups/associations • Listen to calls with prospects and customers • Win-Loss surveys • Persona-targeted articles/blogs • Groups on Linkedin • Follow influencers • Conference topics		• In-person meetings • Job postings • Linkedin profiles • A day in the life • Posts by your persona about their life/career

50+ hours of research and analysis

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Researching Our Buyer Persona
Using unexpected sources

Are buyer personas still too broad?

- Personality types
- Characters most like your persona
- Movies your characters like

Helpful resources:

- PsychologyJunkie.com
- MentalFloss.com
- 16personalities.com

Researching Our Buyer Persona

Example: Using movie characters to depict your persona

Many fictional villains & misunderstood heroes are similar to our persona

Draco | Elsa | Daredevil | Elrond | Katniss

Like our persona, they are **misunderstood**, **pragmatic**, have a clear sense
of **right and wrong** and are **leaders**.

Shaping Our Buyer Persona

Source: KeepItUsable.com

You may also want to include…

- Job details/requirements
- Aspects they like/dislike about their job
- Biggest challenges
- Watering holes
- Influencers
- Place in the buyer's journey
- Terminology they use

Shaping Our Buyer Persona
Continuing to iterate and evolve

Persona 1.0: 20+ slides of detailed information

Persona 2.0: major insight into his personality

Persona 3.0: understanding his buying motivation

Persona 4.0: understanding our buyers

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Acting on the Persona
Creating actionable takeaways for sales, marketing and product

- Slide deck with top takeaways for the relevant team

- Key persona questions at each buyer's journey stage

- Terminology to use for more credibility

- Elements of relevant top of the funnel content (i.e. blog)

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Blog Before & After Persona Work

Before

After

BI TRENDS — Marketing's Digital Distress

BI TRENDS — Platform for Self-Service Analytics

BI TRENDS — Dear Santa... The BI Industry Has Been Naughty

BI TRENDS — 4 Hidden Costs of Open Source Analytics

BI TRENDS — Advice from a Product Manager: 3 Orchestration Techniques

BI TRENDS — How Leaky Analytics Can Cost You Resources and Revenue

Socializing the Persona

An ongoing process

1. **Kick-off meeting**
   - Introduced the persona
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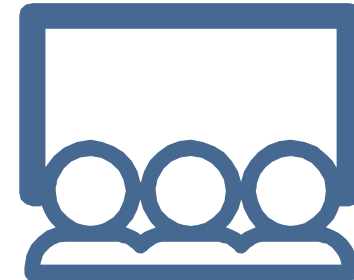2. Institutionalized the persona by thinking in terms of him
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4. Immerse persona throughout the office (haven't done yet)
   - Test employees to gauge knowledge
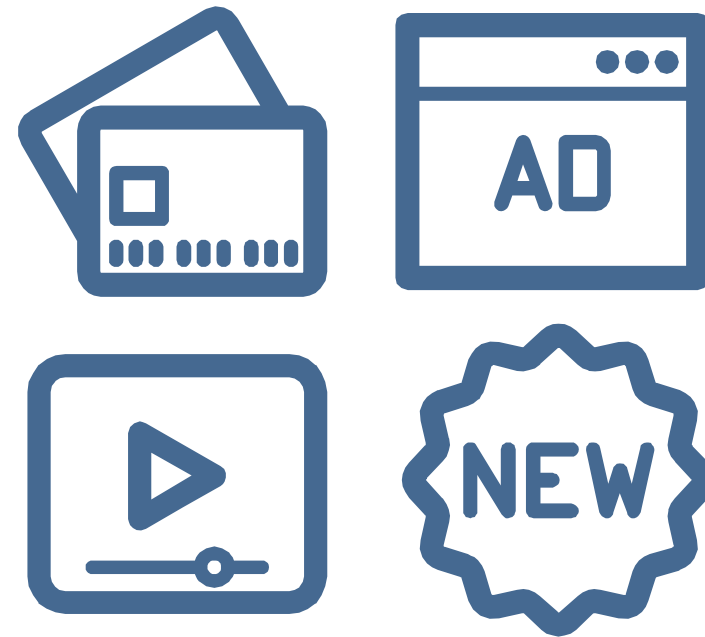   - Birthday parties
   - Posters around the office

Using Our Persona

Consistent messaging throughout the buyer's journey

Impact on Collateral

- Unique selling propositions

- Competitive enablement

- Content marketing

- Advertising

- E-Mails

- Webinars

- Call scripts, voicemails, etc.

Email Before & After Persona Work

Before

Hi there Josh,

It's easy to get carried away with all of the elements that go into compelling dashboards. But seriously, less *really* is more.

In fact, some designs are even moving towards almost no visible text and instead relying more on images to convey important information. Learn that and oh so much more by snagging a copy of our latest guide:

> ebook - *Top 10 Emerging Trends in Dashboard Design*

You'll find out why colorblocking is in and which icons deserve your attention.

I'm always here to help.

Happy designing,
Tara

After

Hi Josh,

Controlling security across your application shouldn't mean replicating your security model in every new feature.

> Learn how to preserve your existing security model inside your embedded analytics *in this on-demand webinar*.

Logi makes it easy for you to deploy analytics instantly and securely. I'm happy to help with questions about enhancing your app with analytics.

Best,
Tara

PS - Learn about security from our professional services team in this *Security Best Practices playlist*.

Using the Persona for Amplification

- Find organizations to partner with

- Find websites targeting your persona

- Leverage relevant influencers

- Content syndication on channels the persona uses

- Conferences to speak at or attend

- SEO

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The Result

Improvements throughout departments

What Improved

- Sales execution
  - Quickly identify how we can help a prospect
  - Improve our win rates
  - Eliminate bad fits much earlier in the buying process

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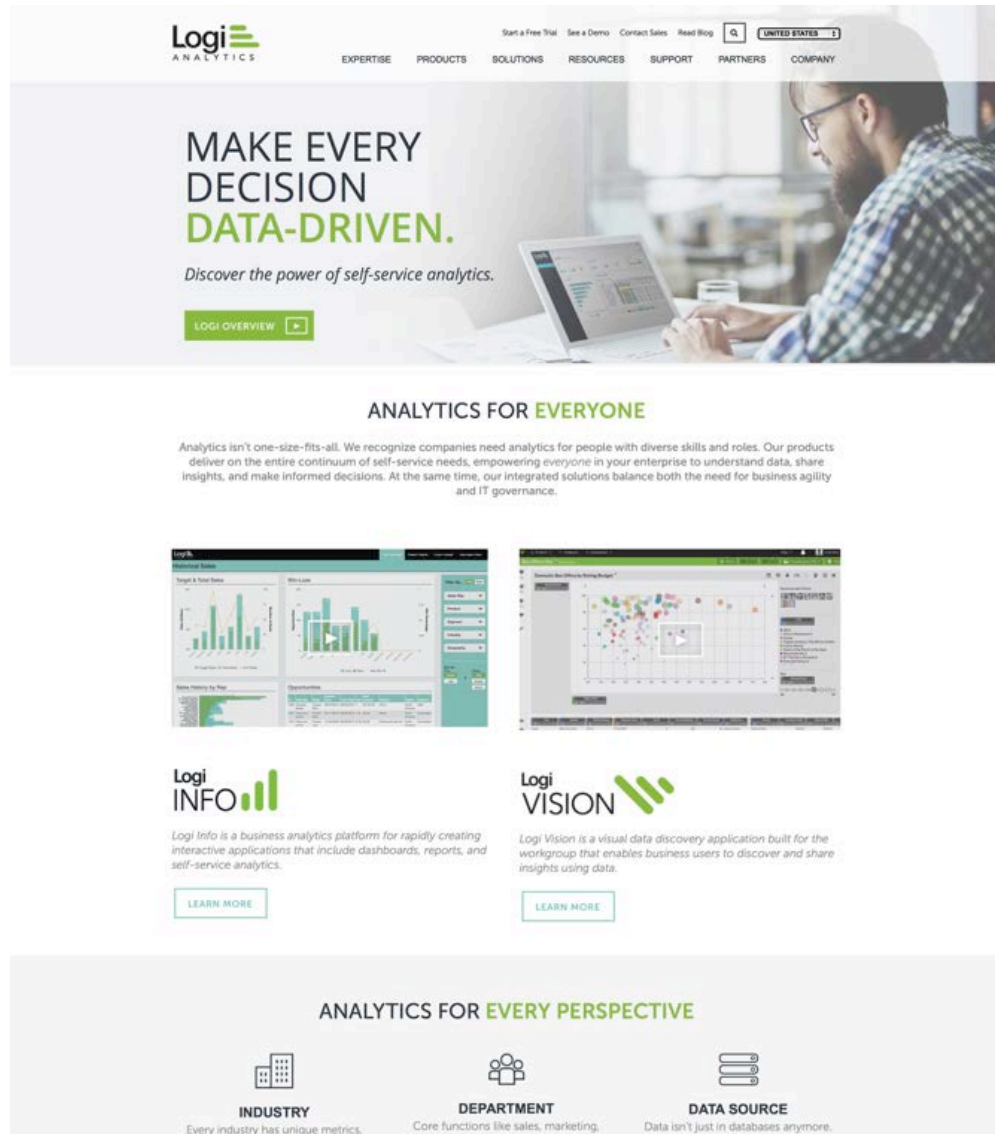 - Lower our ad spend without sacrificing results

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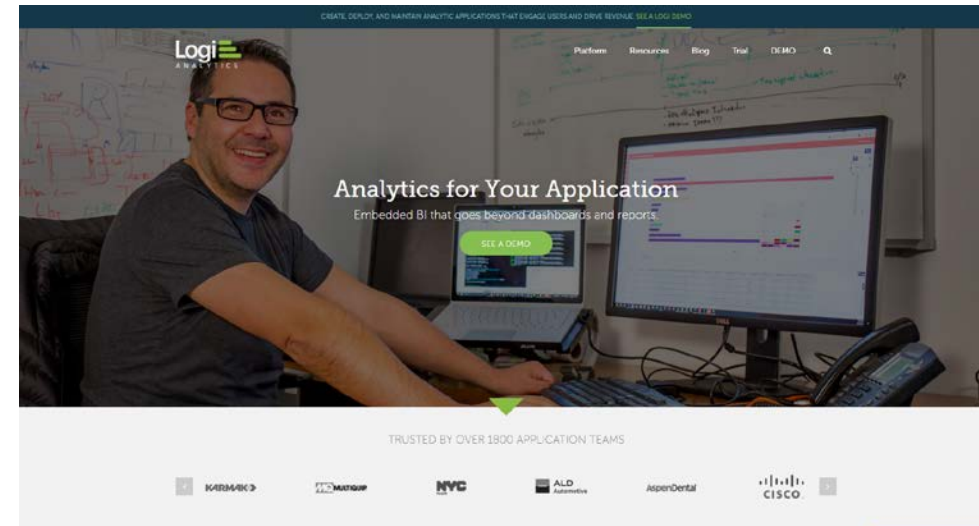
- Positioning
  - **Before Persona:** didn't evoke feelings that would resonate with our buyer
  - **After Persona:** honed in on a niche and created a tight, relevant position
    - Bonus: sped up the process from conception > testing > executive approval

Website

Before

After

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Key Takeaways

1. Use existing data to identify your ideal buyer persona

2. Start high level and collect as much information as you can

3. Go deep to make your persona feel like a real person

4. Train your organization and keep educating them

5. Continue to evolve and richen the persona over time

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poll

How many buyer personas do you have?

Interested in Embedded Analytics?

[ebook]

The 5 Levels of Analytics Maturity: From Basic BI to Sophisticated Differentiators

Five years ago, end users were thrilled to get basic dashboards in standalone tools. But over time, more modern analytics capabilities have emerged—and bare-minimum features are no longer enough.

How have analytics changed over the years? And where do your BI offerings fall on the maturity scale?

Find out what sophisticated capabilities will future-proof your application.

READ THE EBOOK NOW >

LogiAnalytics.com/AnalyticsMaturity

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contact

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Josh Martin

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Thank You for attending!

Join us for next month's webinar:

Customer Retention

B✷M

JAN	FEB	MAR
Product Portfolio	Win/Loss	Stakeholder Communications

APR	MAY	JUN
Requirements	Distinctive Competencies	Collateral

JULY	AUG	SEP
Product Profitability	Referrals & References	Innovation

OCT	NOV	DEC
Customer Acquisition	Customer Retention	Market Problems