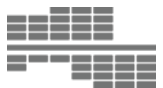


How to Build Personas & Positioning that Wins Customers



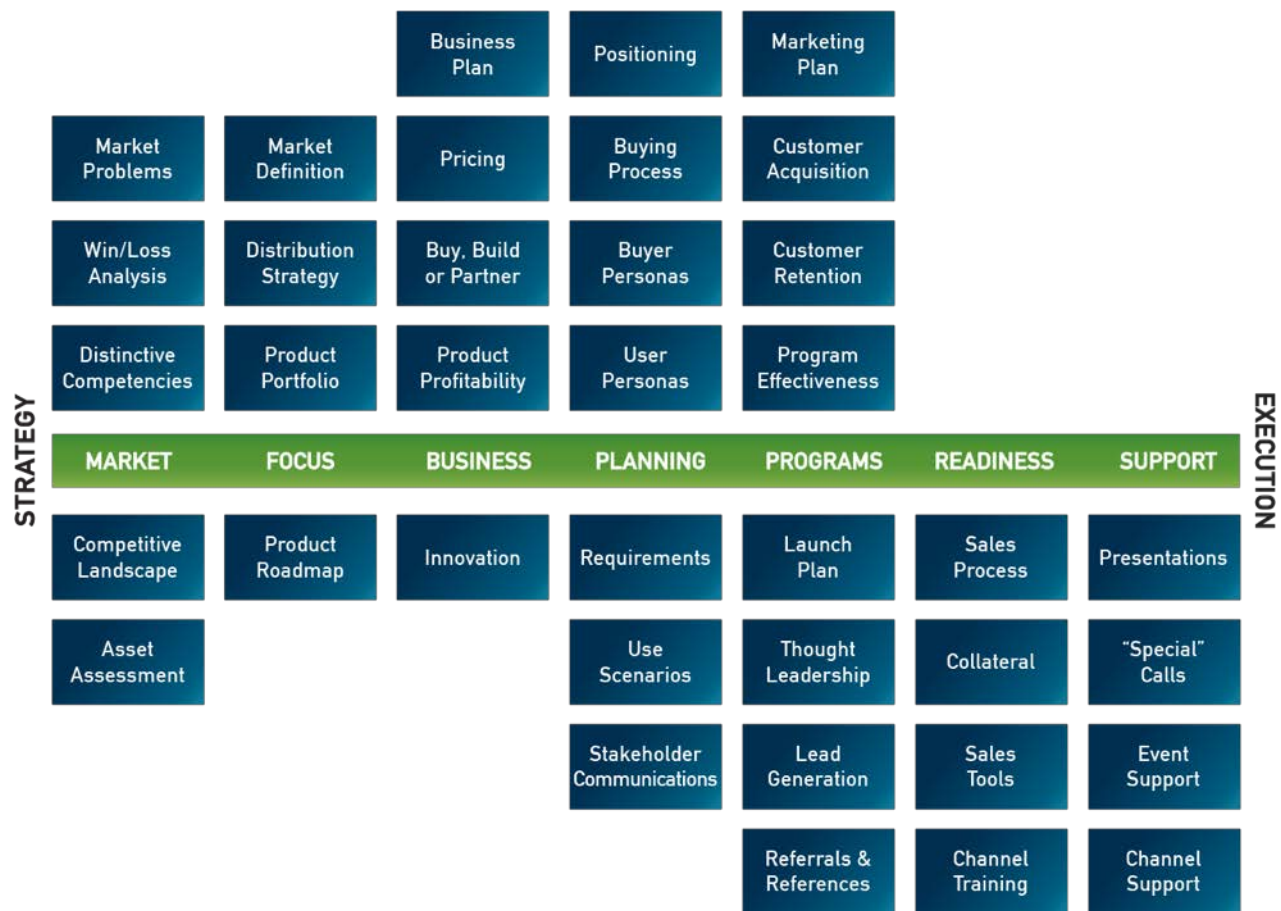
Pragmatic Marketing



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.



Agenda

1. Logi's Challenge
2. Our Solution
3. The Result



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.

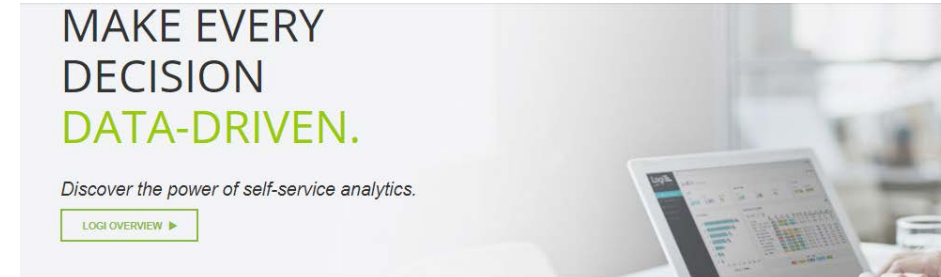


Logi's Challenge

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



ANALYTICS FOR **EVERYONE**

Analytics isn't one-size-fits-all. We recognize companies need analytics for people with diverse skills and roles. Our products deliver on the entire continuum of self-service needs, empowering *everyone* in your enterprise to understand data, share insights, and make informed decisions.



Logi
INFO

Logi Info is a business analytics platform for rapidly creating interactive applications that include dashboards, reports, and self-service analytics.

LEARN MORE



Logi
VISION

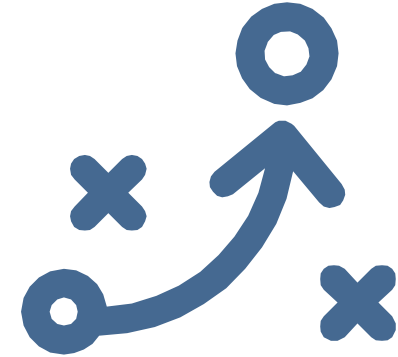
Logi Vision is a visual data discovery application built for the workgroup that enables business users to discover and share insights using data.

LEARN MORE

Areas that Suffered

1. Sales execution

- Too many value propositions which differed drastically for each product
- Significantly longer conversion time



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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
- Evaluated our cost per lead and conversion rates



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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



Defining Our Buyer Persona

Analyze all available data sources

1. Reviewed Salesforce data for direction

- Who are our winning POCs and their titles/influencers?
- Are there consistent themes on deals we win?



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- Leveraged our win/loss process for insights
- Held meetings at our User Conference



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2. Conducted customer interviews
 - Leveraged our win/loss process for insights
 - Held meetings at our User Conference
3. Analyzed marketing campaigns
 - Who was reading our material?
 - Who was converting to opportunities and wins?

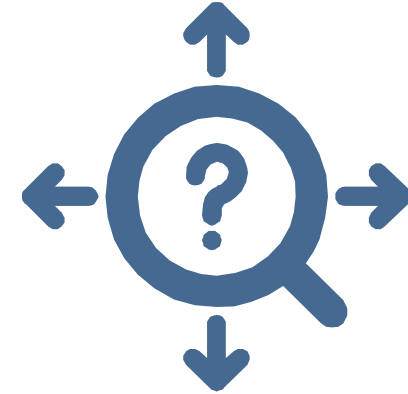


Researching Our Buyer Persona

The 3-Phase Approach

1. Initial fact finding

- Use easily accessible sources
- Start broad
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The 3-Phase Approach

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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 3 – Individual Data
<ul style="list-style-type: none">• 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	Phase 2 – Analysis	<ul style="list-style-type: none">• 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		

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




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

Shaping Our Buyer Persona

Name

Jill Anderson

Photo



Bio

Jill is a Regional Director who travels 4-8 times each month for work. She has a specific region in which she travels, and she often visits the same cities and stays in the same hotel. She is frustrated by the fact that no matter how frequently she takes similar trips, she spends hours of her day booking travel solutions to be as efficient as she is.

Goals

- To spend less time booking travel
- To maximize her loyalty points and rewards
- To narrow her options when it comes to shop

Frustrations

- Too much time spent booking - she's busy!
- Too many websites visited per trip
- Not terribly tech saavy - doesn't like the process

Personality Type

Personality

Extrovert	Introvert
Sensing	Intuition
Thinking	Feeling
Judging	Perceiving

Motivations

Price	
Comfort	
Convenience	
Speed	
Preferences	
Loyalties/Rewards	

Brands

KAYAK	Basecamp
Outlook	
enterprise	IHG

Technology

IT & Internet	
Software	
Mobile Apps	
Social Networks	

Details

"I'm looking for a site that will simplify the planning of my business trips."

AGE	29
OCCUPATION	Regional Director
STATUS	Single
LOCATION	Portsmouth, NH
TIER	Frequent Traveler
ARCHETYPE	The Planner

Organized	Practical
Protective	Hardworking

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

Technical Literacy

Source: KeepItUsable.com

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



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)



Blog Before & After Persona Work



BI TRENDS

Marketing's Digital Distress



BI TRENDS

Dear Santa... The BI Industry
Has Been Naughty



BI TRENDS

4 Hidden Costs of Open
Source Analytics



BI TRENDS

How Leaky Analytics Can Cost
You Resources and Revenue



BI TRENDS

Platform for Self-Service
Analytics



BI TRENDS

Advice from a Product
Manager: 3 Orchestration
Techniques

Before

After

Socializing the Persona

An ongoing process

1. Kick-off meeting

- Introduced the persona
- Provided actionable takeaways



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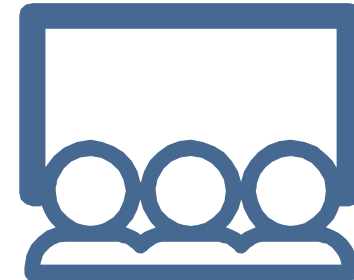
- We discussed his pain
- We discussed how to help him



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 - Regular updates and discussions
 - Integrated into onboarding process for new hires



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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

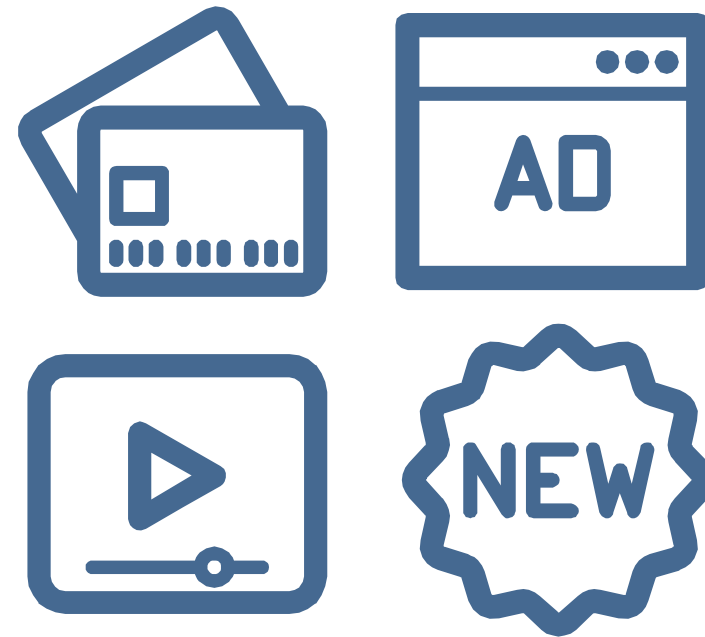


Using Our Persona

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

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



What Improved

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■ Marketing efficiency

- Decrease low quality leads
- Lower our ad spend without sacrificing results



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- Marketing efficiency
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 - Lower our ad spend without sacrificing results
- Brand
 - Consistent messaging across the entire buyer's journey
 - Clear, defined marketing niche without distractions



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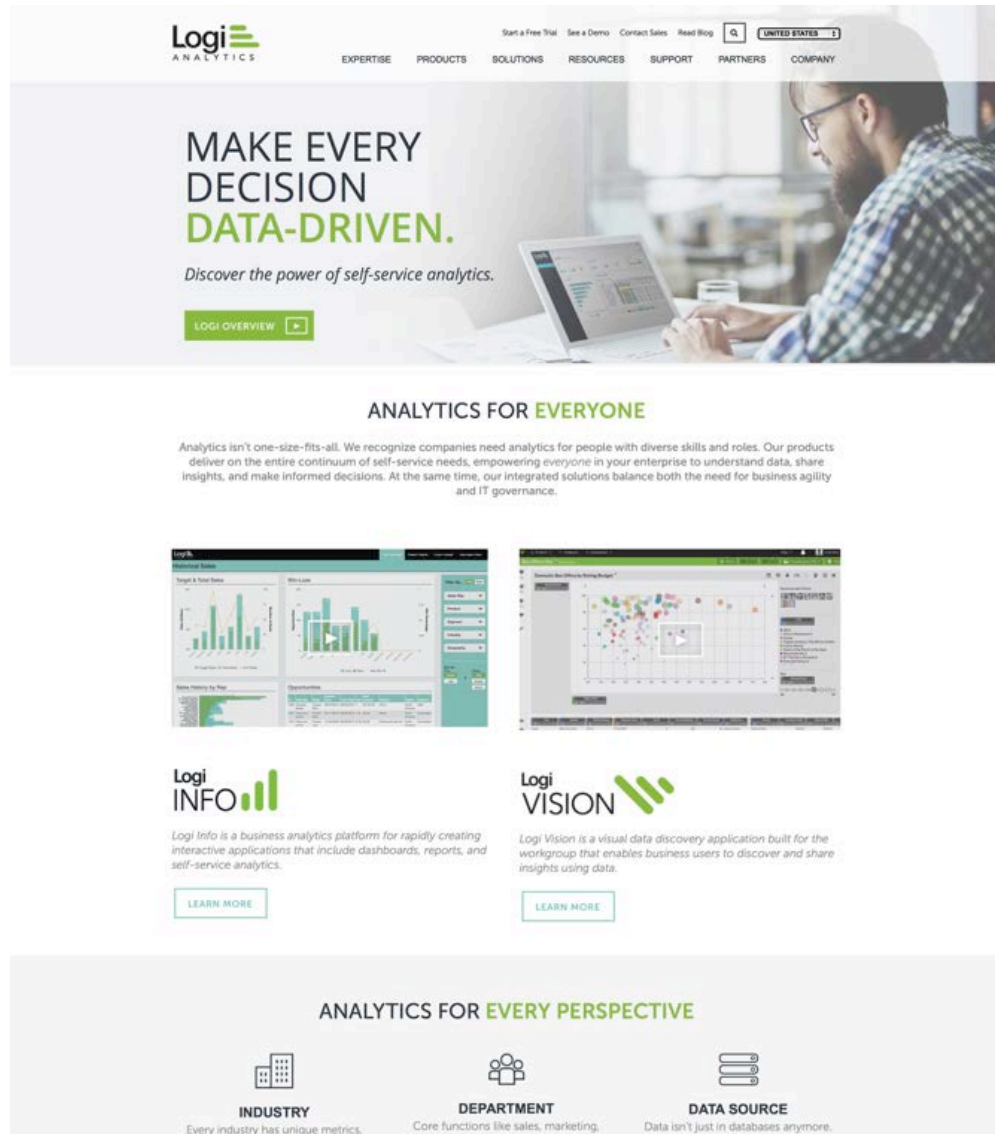
- Consistent messaging across the entire buyer's journey
- Clear, defined marketing niche without distractions

■ Positioning

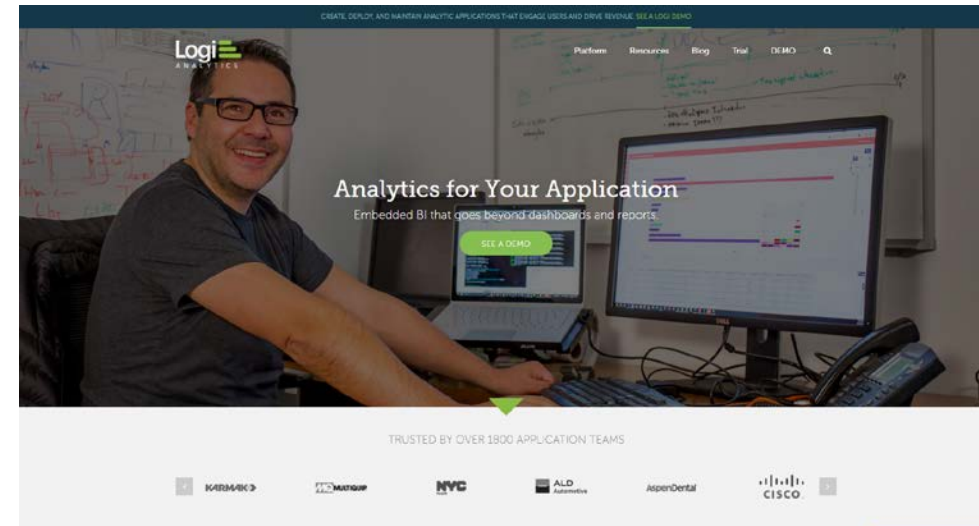
- **Before Persona:** didn't evoke feelings that would resonate with our buyer
- **After Persona:** honed in on a niche and created a tight, relevant position
 - Bonus: sped up the process from conception > testing > executive approval



Website



Before



The #1 Platform for Embedded Analytics.

Create, deploy, and constantly improve analytic applications that engage users and drive revenue. You focus on building the best applications for your users, while Logi gets you there faster and keeps you competitive.



Create Faster with Logi Elements

- ✓ **Logi Elements** are powerful pre-built features that you can configure to meet custom requirements and create unique intellectual property, without having to code.
- ✓ **Hundreds of Elements** including: Data Visual, Analysis, Security, Input, Process/Action, Styling, Formatting, Layout and Design.
- ✓ **Shorten development speed and training time** since your team can use development languages, technology frameworks, security, and skills that are already in place.

“Logi Analytics is best in class for product customization and extensibility”
— BRENDAN WATSON OF CROWDS MARKET STUDY

After



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 enrich the persona over time



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

pragmaticmarketing.com/live



contact



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Josh Martin

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LogiAnalytics.com

Thank You for attending!

Join us for next month's webinar:

Customer Retention



JAN Product Portfolio	FEB Win/Loss	MAR Stakeholder Communications
APR Requirements	MAY Distinctive Competencies	JUN Collateral
JULY Product Profitability	AUG Referrals & References	SEP Innovation
OCT Customer Acquisition	NOV Customer Retention	DEC Market Problems