



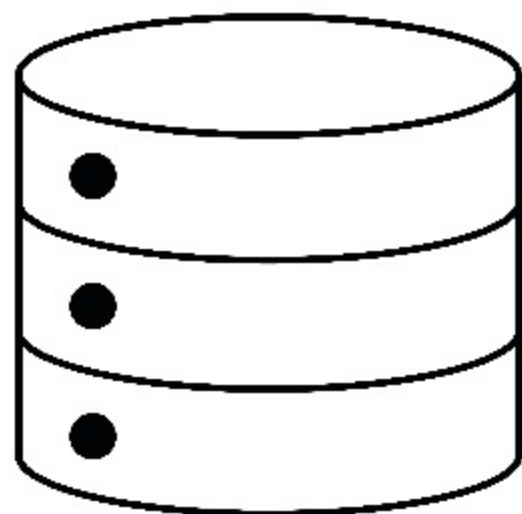
## **How to bring your persona alive?**

Awareness call 04:  
Work on your data.

**The Buyer Persona Training 12th Feb 2021  
Networkevents**



## **Awareness call 04: Work on your data.**



"Na data, no action"

## CUSTOMER DATA IS THE BASIS

# Digital engagement

Your persona is only alive when you actually engage with him, digitally.

**99% is done digitally.**

I did a lot of awareness workshops, especially with sales. I experienced that sales tended to stick to traditional marketing. In order to make them aware of the change to customer (digital) driven marketing, I used stats. One of these was: 67% of the buying journey is done digitally (source: SiriusDecision). Now, 2021, I believe this is 99%.

**Email is the basis of digital engagement.**

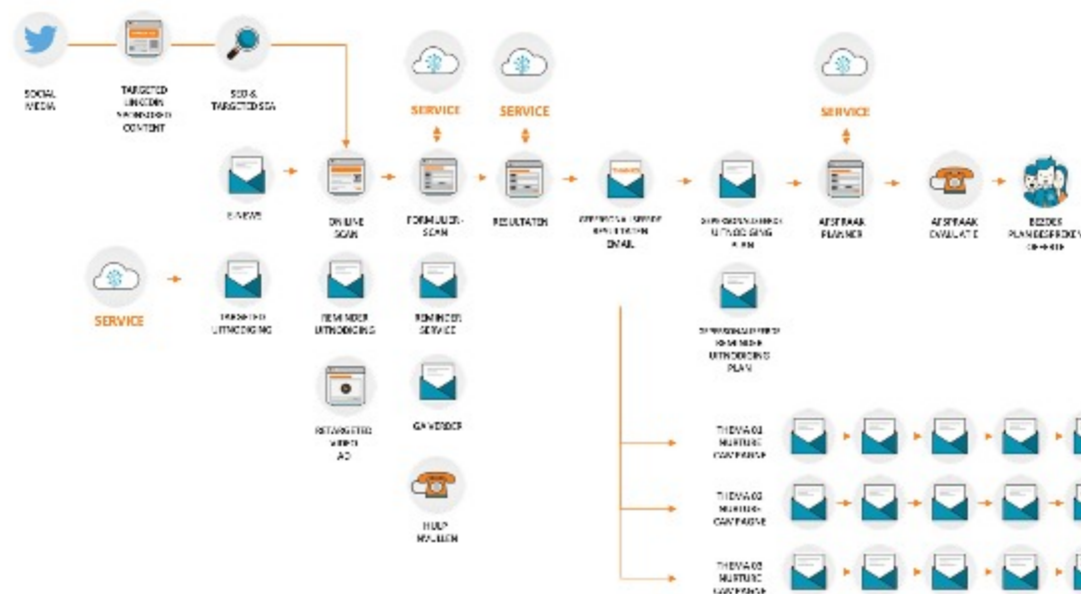
Nowadays there are many ways to engage digitally with people. Within business, email is still the n°1. It is the basic digital 1to1 communication. Can you imagine not having emails anymore within your company? Not to communicate via email with prospects, customers or partners? Email is here to stay. But we should treat it with caution. Cause email can be a blessing, but also a curse.

**No CRM data, no engagement.**

If you do not have your persona in your CRM, there is no engagement, neither digitally, neither via sales nor via service. Your CRM is your basis! I help you with tactics to capture opt-in, identify your persona and enrich the profile.

## CRM, ongoing conversation possible

Once you have your persona in your database, different departments can engage with your persona. Depending on the phase within the customer journey and the contact preference of your persona, a true conversation can take place. Each contact moment can be stored and information can be gathered in your CRM. In this way, your persona can feel like having an ongoing conversation, just like in real life.



ONVZ, Health Insurance Company (Netherlands) - Campaign flow of the Vitaly scan

HR Managers can check the vitality of their company. ONVZ, Health Insurance Company (Netherlands) developed a digital scan. Service and Sales were involved before, during and after the scan. Instantly the HR manager knew the results and got instant advice form service. Sales could check the opportunities. And marketing could start nurturing campaigns. (see for more info: [growthup.eu/projects](https://growthup.eu/projects))

## START YOUR DIGITAL ENGAGEMENT

# Opt-in first

No opt-in, no conversation.

I share with you tactics to accelerate your opt-ins.

### Wake up call. Get your basics right.

I will not go into the technical details of opt-in. (If you need assistance, send me an email: [stefaan@growthup.eu](mailto:stefaan@growthup.eu) or book a meeting via [growthup.eu](https://growthup.eu))

I do want to make you aware of the importance of it. During the last 15 years, I have experienced that marketers tend to forget this.

Wake up call. If you do not have the permission to contact a persona, you waste your money. Make sure you have your basics right!



### See optin as your relevancy check.

Depending on the type of message and the customer relationship you have with your persona, you need an opt-in. If your persona is a customer, you can send him service and product driven messages without an explicit opt-in. If you want to send commercial messages, an opt-in is needed. If your persona is a prospect, you need an opt-in for all sorts of email messages.

If you are a marketer, try to see opt-in not as a pain in the ass, but rather a check for yourself if your message is relevant to your persona. In stead of asking one opt-in for all types of message, try to make sense of relevancy. When is it relevant to ask an opt-in for which type of message during the buying journey? I made the following overview.

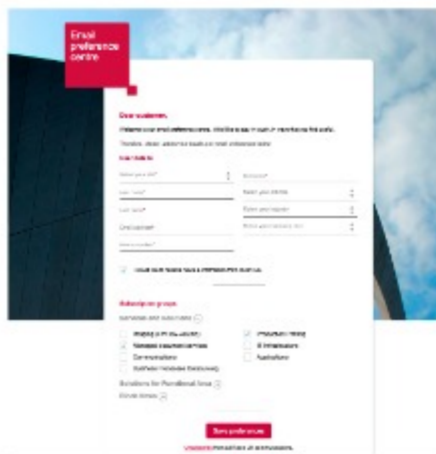
type of message	Prospect			
	Search for knowledge	Inform possibilities	Deep Dive	Decision
Industry	1	1	1	1
Expertise Tips	1	1	1	1
Company news	0	1	1	1
Commercial Products	0	0	1	1

## Keep your persona happy with preference centre.

A marketer tries to keep bounced emails to a minimum, and he is heartbroken when one of the contacts unsubscribes. But did you know there's an easy way to reduce the number of contacts that unsubscribe and increase subscriber satisfaction by setting up an email preference centre?

When your emails don't meet his needs, his knee-jerk reaction may be to unsubscribe. But what if he just wants to receive fewer emails or only messages about a specific product? You don't want to lose him (her).

A preference centre is a digital form in which your contact, persona, can manage his contact data, his interests and email subscriptions. Some brands allow the contacts also to manage the frequency of emails or even to have a break. It keeps your persona happy.

A screenshot of an email preference center form. The form is titled "Email preference centre" and includes sections for "User details" (Name, Email, Phone, Address), "Subscription preferences" (Frequency, Topics, Format), and "Marketing preferences" (Frequency, Topics, Format). A "Save preferences" button is at the bottom.

Source: Engagementfactory.com

## 3 WAYS TO GET OPT-IN

There are 3 ways to obtain an opt-in from you persona. Best practice learned that you apply all 3.

### 1. Spontaneous opt-in

You propose spontaneously your help and it is up to your persona if he needs this help. This form is used when you do not know the persona. You have no prior track of record.

e.g.

You want tips to improve your listening skills? > yes

You want to know more about sustainability? > no

A screenshot of an ebook opt-in form. The form is titled "The Beginner's Guide to Online Marketing" and includes a "Grab the ebook now!" button. The form is part of a landing page for an ebook.

Source: campaignmonitor.com

## 2. Aided opt-in

Based upon your knowledge of the persona, you can suggest to subscribe to another email list. This can be done through email (using the power of suggestion), personalized content on the website, a form or the phone.

e.g.

Your persona is already subscribed to receive weekly company news, you can suggest to get information about your products.

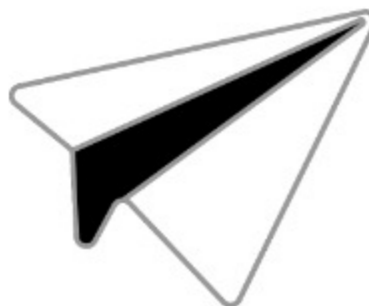
You know the contact is an architect, so you suggest to subscribe to newsletter of sustainable housing.

Persona wants to get a report (10 sustainable architecture techniques) , you can suggest to subscribe to a newsletter related to that report (sustainable housing).

You persona enrolls for a webinar on sustainability. You can ask in the form to subscribe to your newsletter about sustainable housing.

## 3. Free product usage

The moment your persona agrees to use a product for free or he subscribes for a free trial, he agrees to receive messages related to the usage of the product. Depending on the country and privacy policy of the company, you can also send him commercial messages to convert him to customer (always give the possibility to unsubscribe).



## OPT-IN RULES

You want a maximum of opt-ins? Than apply these 5 rules.

### 1. Give value

Your persona wants to get value. So please give him value. Think of your persona exercise on jobs, pains and needs. What is he or she looking for? Giving something for free is not value! This is just trick or treat.

### 2. Be transparent

Be transparent in what they will get, how many times, when, how they can manage their preferences and how they can always optout.

### 3. Be specific

Be specific as possible. People hate uncertainty and ambiguity. We marketers tend to be lazy (as all people). We use container terms to catch it all at once.

### 4. Make it easy

Basic principle of CX: easy. The less people need to click, fill in, the better.

### 5. Always send an email confirmation

Send a confirmation email!! Do it. 3/4 of the companies aren't doing it. So stand out and send a confirmation email. Basic law of reinforcement: if people are confirmed in their behaviour, they will keep on doing so.

## LET'S GET TO KNOW YOUR PERSONA

# Profiling

How to identify your persona and get to know him?  
All stored in your CRM for Marketing, Sales & Service.

### Align with CRM

Once you have a contact in your database, make sure you can identify him and get to know him better. Align with CRM on the fields and the type of data.

### Do a quality health check first.

Before implementing new fields, make your people first aware of the quality of data. They need to understand: no quality data, no quality action. In my terms: shit in, shit out.



## PERSONA IDENTIFICATION

It is an easy 2 step approach.

### Step 01. Define your identification criteria

What data is needed to identify your persona? Is it the role within the company? Is it gender? Or is it a combination of data elements? Like role and industry. Limit your persona identification to 2 data elements.

### Step 02. put in place the tactics to collect the data

You can apply different tactics to get the data from your contact. There is an explicit and an implicit way. Explicit means you ask directly to the contact. Implicit means, you don't ask. You know based on his digital behavior, i.e. on what he clicked on your website or email and which type of content he consumed.

### Explicit tactics

> Preference centre

Once a contact gave his opt-in, he has access to his preference centre. Incorporate in your profile information the data elements you need to identify your persona.

> Content form

If you give real valuable content, than it pays off to send it to his inbox. So he can access it anytime and use it. In order to do so, you put a form (which is prefilled with the emailaddress) and the identification data elements.

> Participation or account form

When a contact wants to participate to an event/ webinar or he wants to get access to a tool or even more content, put in the form the identification elements.

> Over the phone

When a sales person or service has someone over the phone, they have their CRM system open. It is easy to ask and fill in the identification criteria.

### Implicit tactics

> Email behaviour

If a contact clicks several times on content that is related to a persona, than you can assume the contact is the persona. At least 2x. You can also try with tracking the openings of email. In this case the email needs to be 100% persona based content.

e.g. the contact clicked on a link of "design trends" and clicked on "design software" the contact opened an email with subject title: "You want to be a great architect?"

> Website behaviour

It is the same principle as email behaviour, the type of action (click/open) will be different and you need to have the consent of the contact to track his web behaviour. Also you need to take into account the different devices.

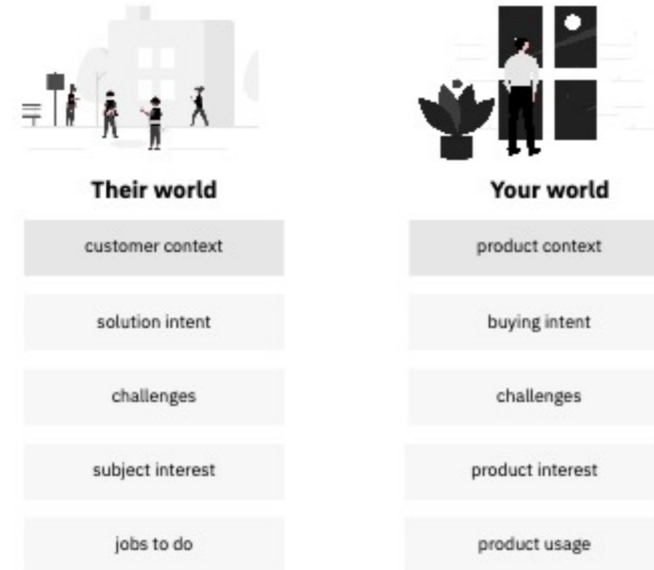
e.g. the contact clicked on a link to a blog post, read for 2 min a blog post and clicked, and some days later read another blog post

## PERSONA PROFILING

Once you have identified the persona, you can get to know him better.

### 2 worlds: Customer and product context

As you have read in Awareness call 03 Step Outside, there is a customer context and a product context. The customer context is all about the situation, the solution, the jobs to be done, the pains and gains of the customer. The product context is all about the activities and roles related to the buying and usage of the product. We tend to ask only about the product context.





A mix of both worlds is good. Start with their world.

### Relationship is key

Within the context of a good relationship, you can get people to buy. It is like falling in love. Before doing so, you first need to get to know each other. Explore each others world. And than if both feel true connection, love awakens. So start with their world.

2 steps approach.

#### Step 01. Define your profile criteria

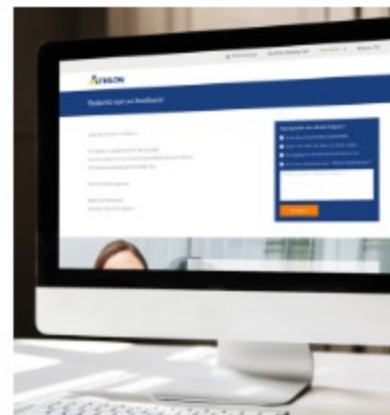
Align with all stakeholders on what you want to know from the product and the customer context. Have a look at the data you gathered during your persona research.

#### Step 02. Put in place the tactics to collect the data

See the tactics in persona identification. I add 2 more tactics.

> Short Poll

You must know the thumbs up and down in some emails. I once implemented these for Athlon, a service email, and it turned out to be a hit. People liked it and used it because they felt their opinion mattered. On top, customer service got some really great insights and feedback from customers just by some clicks, avoiding phone time.



The same principle can be applied for asking information to persona. Either you can ask a closed question and they can respond with 2 answers, just by clicking. This information can then be stored in their preference centre.

> Profile campaign

You can set-up a profile campaign. Never heard about it? Some marketers call it "Get to know you campaign". You can integrate this in the Expert campaign (ref. Awareness call 5 Communicate to help). Want to know more? Schedule a meeting on [growthup.eu](http://growthup.eu) and I show you how.

# THANK YOU.

**Hey, I'm Stefaan,**

I help marketing managers to  
build a CX driven lead machine.  
Get far more results on your  
digital engagement.

You want to accelerate in CX, build a lead machine or take your  
emails to the next level?

Let's meet up



I hope I have inspired you  
to bring your persona alive!

**Your feedback is welcome.**

stefaan@growthup.eu



## Happy to share my own best practices and learnings from 18 years of marketing experience.

Discover some of the brands I have worked for, the industries, the type of expertise and projects.

You want to know more?

[Let's schedule a meeting](#)



## Where do you need acceleration?



Customer Experience



Lead Marketing



Email marketing