

Buyer Avatar Transformation Worksheet

PERSONA (AVATAR) BASED MARKETING

The best marketing is based on personas. They represent real *individual* people. Personas are not based on composites because they don't represent reality.

EXAMPLE:

Composite Millennial: We sell to millennials. They are in their early thirties and value access, excitement, and experience. Millennial Mike is 31-years old and values "access." They don't save because of expensive downtown rents and frequent habits of eating out. Millennials need help budgeting for savings and retirement. Financial advisers can provide this guidance.

Realistic Millennial #1: Dave is 31-years old and runs his own IT company. He's always had a knack for learning new things including investing. As Dave is growing his business, he wants to shelter as much income from taxes as possible. He's struggling to determine how much money to leave in the business verses how much to bring home. He's unaware of unique investing and saving vehicles that are available to him as a business owner. Dave needs a financial adviser who can help him navigate these waters.

Realistic Millennial #2: Dan is 31-years old and just had his second daughter. He works in IT and has bounced around a few companies. He's got 401k savings in each of these companies. Dan is looking for ways to maximize the utility of his money while also providing security for his wife and daughters. He needs a financial adviser to help him manage his 401k as well as make decisions on various insurance products.

The two Realistic Millennial avatars are based on real people who both work in IT but have greatly different needs. They are also divergent to the Composite Millennial stereotypes. You will fail to sign both Dave and Dan as clients if you market to them as if they were the Composite Millennial.

NEXT STEPS:

- Identify 3 REAL people that fit your target avatar. These need to be people you know and have interacted with. They can be customers or prospects. They will be your buyer prototype.
- You should complete these based on your knowledge of the person.
- Complete pages 2 and 3 for the 3 buyers you suggested.
- Stop before page 4 if you have a workshop scheduled with allies4me. Otherwise you can continue with page 4.

IMPORTANT: Complete them for those specific people. Don't extrapolate to other "ideal" buyers. This process needs to be about a real person

NOTE: The challenges, goals, pains, obstacles, etc. on page 3 are your buyer's traits – not yours. Complete this page as if your company didn't exist. Think about the goals, pains, and challenges they are facing in life.

BUYER AVATAR NAME:

Age:

Gender:

Marital Status:

/ Age of Children:

Occupation:

Job Title:

Annual Income:

Education Level:

Location:

If you met your buyer at a cocktail party and had to describe them, what traits do they have? (i.e. focused, energetic, positive, decisive, etc.)

What quote or creed defines their life?

What are your buyer's buying style?

Impulsive
Proactive

Thoughtful
Reactionary

What is the conversion goal for this buyer?
(what action do you want them to take?)

BUYER AVATAR NAME:

Goals and Values

Goals (Personal & Professional)

Values

Objections and Roles

Role in buying process

List as many possible objections as possible

Challenges and Pain Points

Challenges (Personal & Professional)

Pain Points (Personal & Professional)

BUYER AVATAR NAME:

Before Your Product or Service

Have

Feel

Average Day

Status

Good vs. Evil

After Your Product or Service

Have

Feel

Average Day

Status

Good vs. Evil