



# THE CUSTOMER AVATAR WORKSHEET



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It makes sense, right?...

*“To market a product or service properly, **the first thing you must do is get clear on WHO your ideal customer is, where they are hanging out, what their challenges are...**”*

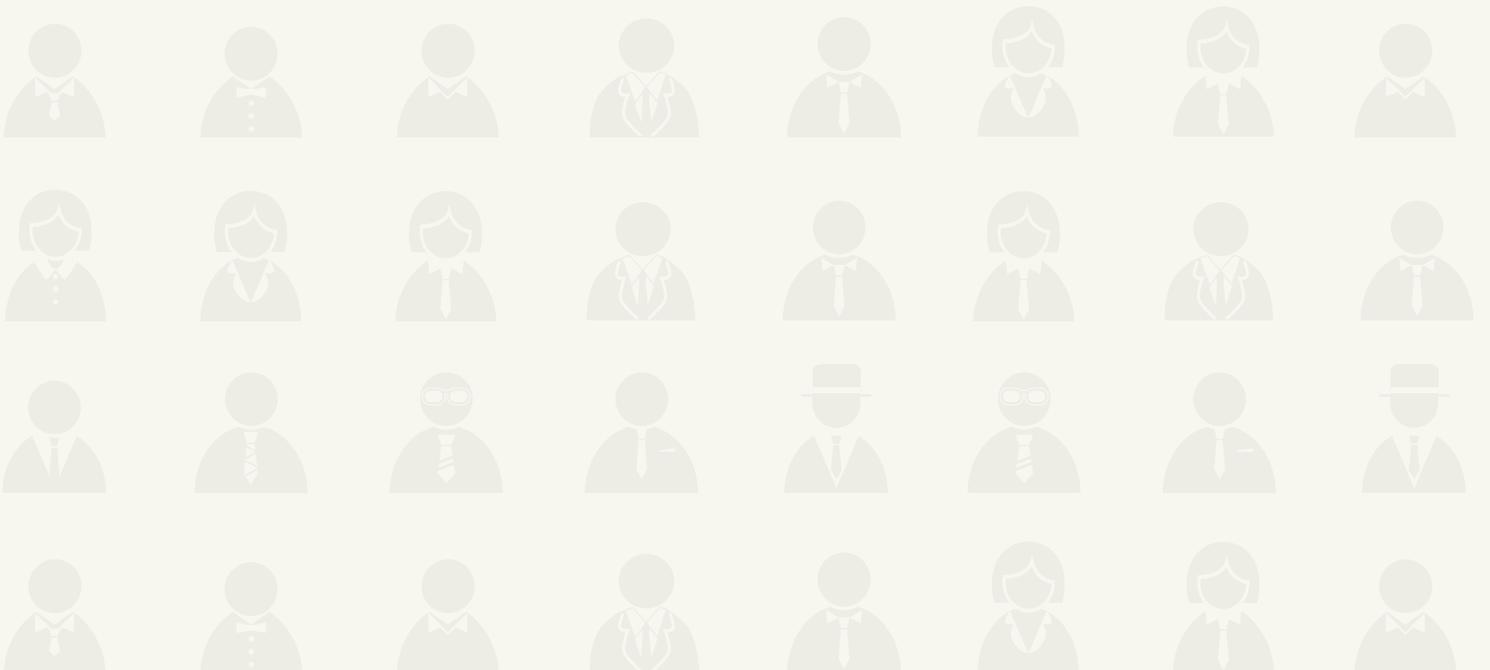
You know building a customer avatar (some call it a buyer persona) would have a huge impact on your marketing.

But how?

We'll get into the *how-to* in just a second, first understand that a customer avatar is...



# THE SWISS ARMY KNIFE OF MARKETING



This exercise will **impact virtually every aspect of your marketing and sales process including...**

- **Content Marketing** - What blog posts, videos, podcasts, Lead Magnets, etc. should you create to attract and convert your avatar?
- **Paid Traffic** - Which ad platforms should you buy traffic from and what targeting options should you use?
- **Product Creation** - What solutions is your avatar searching for?
- **Copywriting** - How should you describe offers in your email marketing, ads and sales letters in a way that compels your avatar to buy?
- **Email Marketing** - Which avatar should receive a specific email marketing campaign?

... and that's just scratching the surface. Any part of the marketing and sales process that "touches"

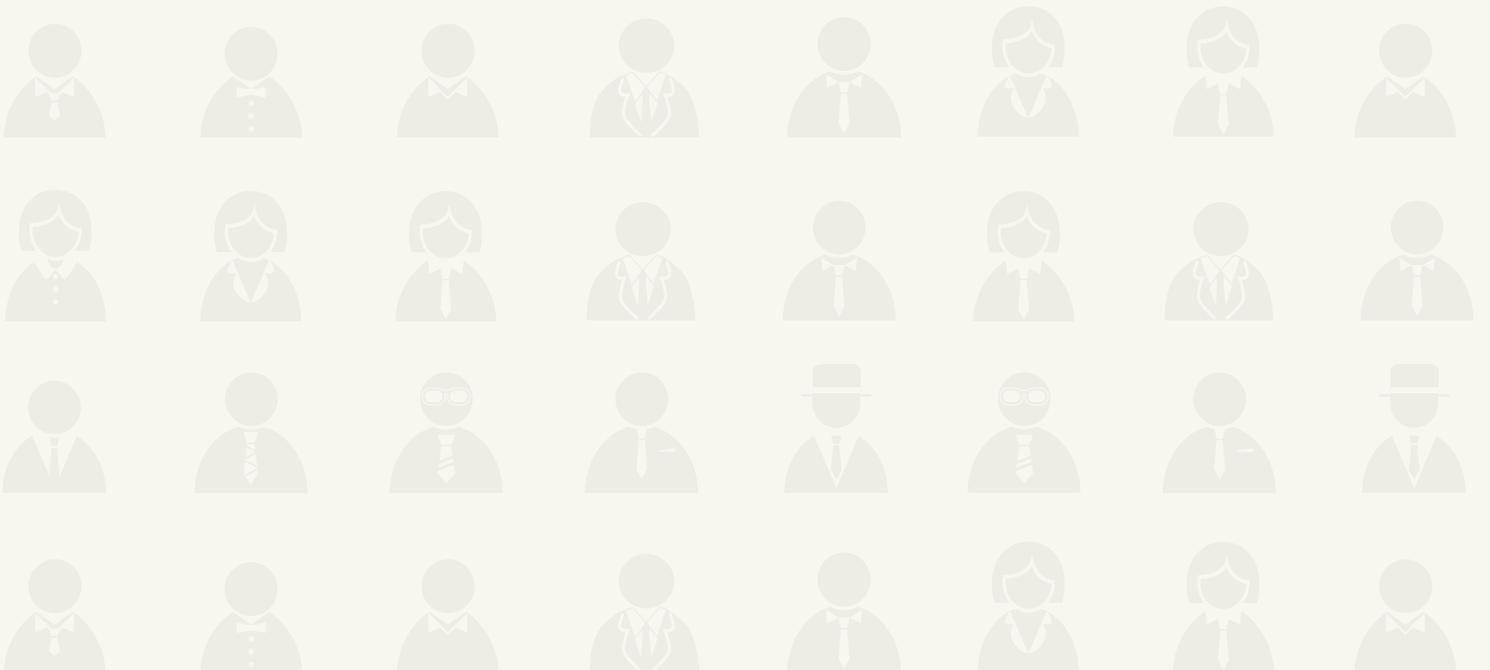
the customer (which is pretty much EVERYTHING) **will improve when you get clear on your customer avatar.**

After all, it's a person that buys our products and services. It pays to get clear on the characteristics of that person, so you can **find and present them with a message that moves them to action.**

Let's look at an example customer avatar...



# MEET AGENCY ERIC



In April of 2015, Digital Marketer introduced a new offer.

We began selling a new type of digital marketing training product: Certification Classes. These new trainings include exams, certificates and badges.

A new product means a new ideal customer. And, **a new ideal customer means a new customer avatar must be built.**

We defined 4 distinct buyer personas:

- **The Marketing Freelancer** - interested in training and certification to distinguish herself from the other freelancers she is competing with in the marketplace.
- **The Marketing Agency Owner** - interested in training and certification to add to the services he can offer his clients and to sharpen the marketing skills of his employees.

- **The Employee** - interested in training and certifications to distinguish himself at his place of employment or to secure a new job or promotion within his existing job.
- **The Business Owner** - interested in training and certifications to sharpen her own marketing skills and the skills of her internal marketing team members.

As a result, four new "Customer Avatars" were born.

One of these avatars is known as Agency Eric.

# CUSTOMER AVATAR

## AGENCY ERIC

### GOALS AND VALUES

Goals:

Eric wants to...

- Increase agency business
- Increase the capabilities of his team
- Scale his business

Values:

Eric is committed to...

- Professional development for he and his employees
- Providing value for his clients
- Using "white hat" marketing principles



### CHALLENGES & PAIN POINTS

Challenges:

Eric is challenged with...

- Scaling his agency business
- Finding , training and retaining top marketing talent
- Keep his marketing skills sharp while being CEO.

Pain points:

Eric's pain points are...

- Fear of losing business to competitors
- Fear of his agency falling behind the digital marketing scene

### SOURCES OF INFORMATION

Books: Good to Great / Think & Grow Rich

Magazines: Wired / Fast Company

Blogs/Websites: AdAge / DigiDay / Social Fresh

Conferences: Content Marketing World / SXSW / Inbound

Gurus: Jay Baer / Joe Pulizzi / Christopher Penn

Other: Spends time on LinkedIn looking for talent

Quote: "I surround myself with people smarter than me."

Occupation: Digital Marketing

Job Title: CEO/Founder

Annual Income: \$150,000

Level of Education: MBA

Other: Spends time on LinkedIn looking for talent

### OBJECTIONS & ROLE IN PURCHASE PROCESS

Objections to the sale:

- Does the training fit an existing service or a new service he can offer to his clients.
- How long he and his team member will be "out of pocket" doing the training

Role in the Purchase Process:

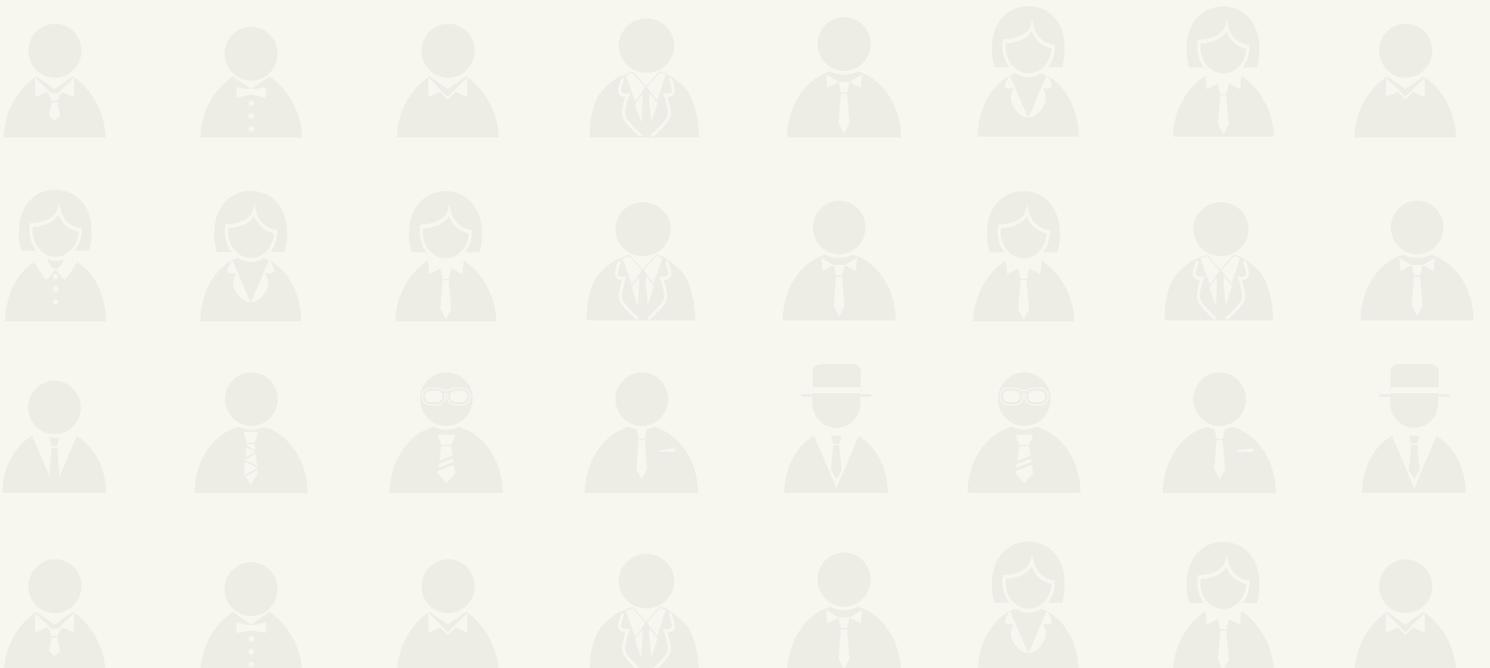
Eric is the decision maker. He buys digital marketing training to keep himself and his team sharp. He's not worried about the price point if he knows the training will give he and his team an edge in the marketplace.



Let's have a look at the different components of the Agency Eric customer avatar as an example.



# CUSTOMER AVATARS: WHAT TO INCLUDE



There are 5 major components to the customer avatar. In some cases, you'll need to survey or have conversations with existing customers to accurately flesh out your customer avatar.

In other cases, you'll be intimately familiar with the characteristics of your ideal customer.

In any case, **move forward. Don't wait for surveys or interviews to be conducted to create your first draft of an avatar.** Make assumptions where you have no data or feedback and put it on your short list of to-do's to complete your research.

In the meantime, you'll begin getting benefit from an avatar built from the assumptions you've made.

Let's look at each section of the Customer Avatar Worksheet in turn...

## Goals and Values

**GOALS AND VALUES**

**Goals:**

Eric wants to...

- Increase agency business
- Increase the capabilities of his team
- Scale his business

**Values:**

Eric is committed to...

- Professional development for he and his employees
- Providing value for his clients
- Using "white hat" marketing principles

We begin with the goals and values of your ideal customer.

Make note of the goals and values that are relevant to the products and services you offer. You'll use this information to drive product creation, copywriting, content marketing and email marketing.

We know, for example, that Agency Eric is interested in “increasing the capabilities of his team.”

As a result, we could draft an email to this avatar that promotes our Content Marketing certification with the subject line:

*Need Content Marketing training?*

That should get Agency Eric’s attention.

## Sources of Information

SOURCES OF INFORMATION	
Books:	Good to Great / Think & Grow Rich
Magazines:	Wired / Fast Company
Blogs/Websites:	AdAge / DigiDay / Social Fresh
Conferences:	Content Marketing World / SXSW
Gurus:	Jay Baer / Joe Pulizzi / Christopher Penn
Other:	Spends time on LinkedIn looking for talent

This section of the Customer Avatar Worksheet is critical to determining the “where” of your customer avatar.

You will **determine the best places to advertise** and the targeting options you’ll use to reach your avatar by listing their sources of information.

Use the “But no one else would” trick when filling out this section of the worksheet. You’ll simply complete sentences like these...

- **My ideal customer would read [BOOK] but no one else would.**
- **My ideal customer would subscribe to [MAGAZINE] but no one else would.**
- **My ideal customer would attend [CONFERENCE] but no one else would.**

Are you getting the picture?

The idea is to find the niche books, magazines, blogs, conferences, gurus, etc. your ideal customer would be attracted to - but no one else would.

For example, if you are in the golf products market - you wouldn’t want to assign Tiger Woods as a guru. Tiger is someone that golfers are familiar with - but so is everyone else.

Instead, choosing a more niche golfer like Rory McElroy will allow you to hone in on your ideal customer - and exclude everyone else.

When buying traffic from ad platforms like Facebook, you'll often be able to **laser target your audience by focusing on these niche interests** -- while excluding less than ideal prospects.

## Demographic Information

Age: 40	Quote: "I surround myself with people smarter than me."
Gender: Male	Occupation: Digital Marketing
Marital Status: Married	Job Title: CEO/Founder
#/Age of Children: 2 (Age 8 & 10)	Annual Income: \$150,000
Location: Orlando, Florida	Level of Education: College Graduate
	Other: Spends time on LinkedIn looking for talent

Applying demographic information will **bring your customer avatar to life**. While the usual demographics are critical, the exercise of filling in the 'Quote' field can be particularly helpful to "get inside the head" of your ideal customer.

The demographics are another useful part of the Customer Avatar when choosing targeting options in ad platforms like Facebook.

And, when writing content, email or sales copy it can be beneficial to simply write as though your avatar were sitting across the table from you. Demographic information like age, gender and location will **give your persona a look and feel.**

## Challenges & Pain Points

### CHALLENGES & PAIN POINTS

**Challenges:**

Eric is challenged with...

- Scaling his agency business
- Finding , training and retaining top marketing talent
- Keep his marketing skills sharp while being CEO.

**Pain points:**

Eric's pain points are...

- Fear of losing business to competitors
- Fear of his agency falling behind the digital marketing scene

This section will drive new product/service development as well as the copywriting and ad creative you'll use to **compel your ideal customer to action.**

When selling certifications to Agency Eric, for example, we would do well to build solutions to his challenges and pain points and use language that addresses them in our marketing messages.

For example, our sales letter should include copy like...

*Are you tired of losing proposals simply because you don't offer Content Marketing services to your clients? Certify your team with Digital Marketer's Content Marketing Mastery Course and Certification.*

Copy like that will **get a response from Agency Eric because it is specific to one of his pain points.**

## Objections and Role in Purchase Process

### OBJECTIONS & ROLE IN PURCHASE PROCESS

#### Objections to the sale:

- Does the training fit an existing service or a new service he can offer to his clients.
- How long he and his team member will be "out of pocket" doing the training

#### Role in the Purchase Process:

Eric is the decision maker. He buys digital marketing training to keep himself and his team sharp. He's not worried about the price point if he knows the training will give he and his team an edge in the marketplace.

Why would your customer avatar choose NOT to buy your product or service? These are called "objections" and they must be addressed in your marketing.

For example, if we know that Agency Eric is concerned with the amount of time his team members will be “out of pocket” to receive the certification, we might send an email with a subject line like...

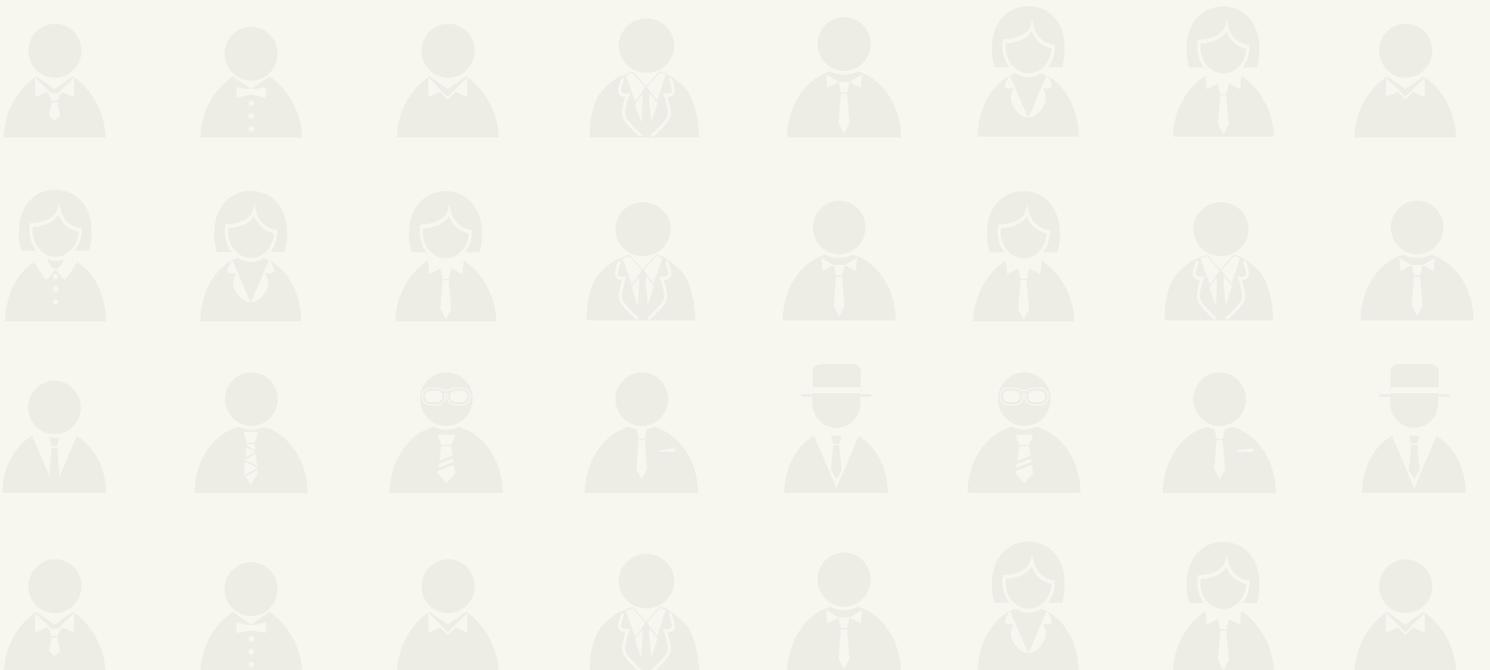
Content Marketing Certified (In one business day)

You must also determine your avatar’s role in the purchasing process. Are they the primary decision maker? Are they a decision influencer?

Understanding your ideal customers decision making process is paramount to the **success of your marketing and sales campaigns.**



# BUILD MULTIPLE AVATARS

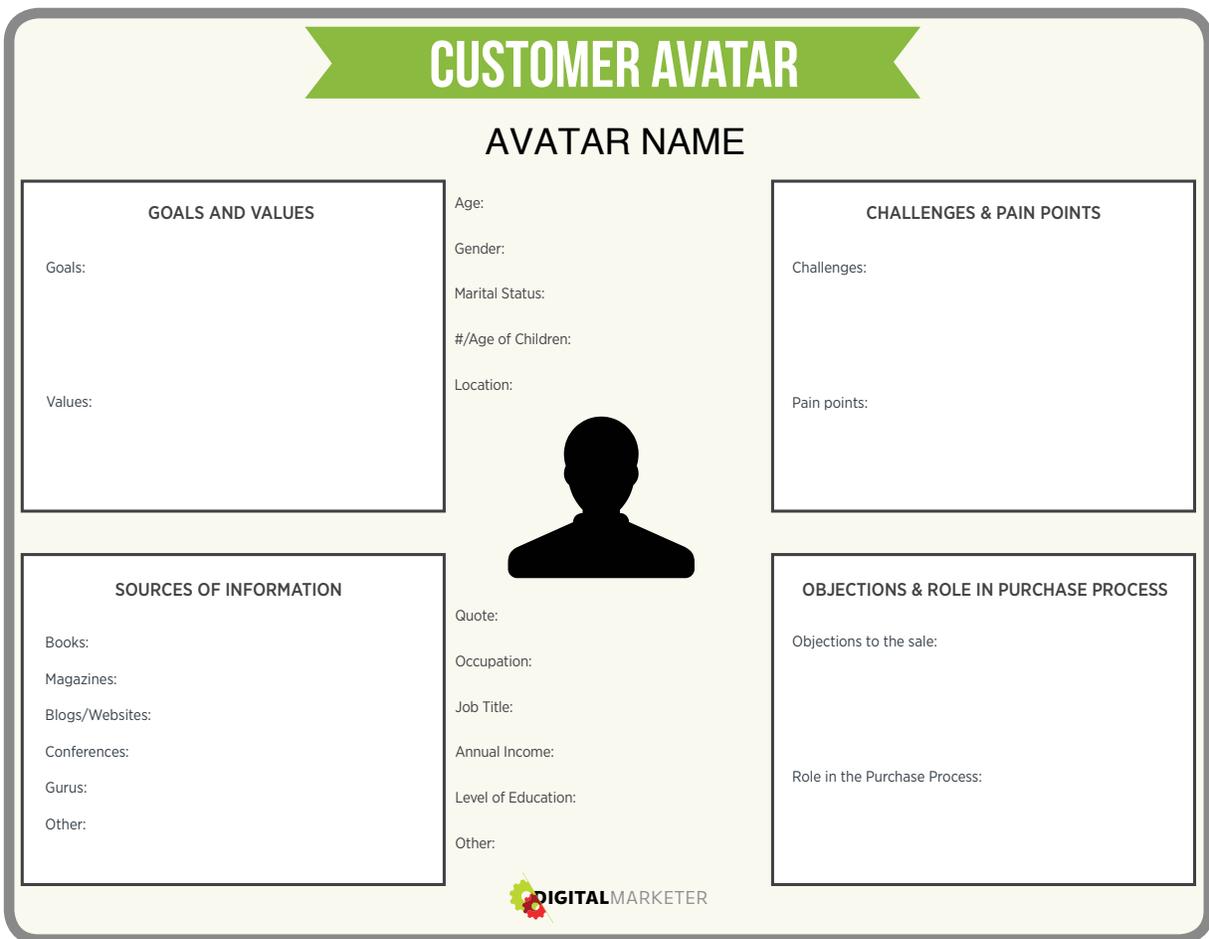


Start by building a single avatar. But don't stop there.

Once you get the hang of it, you'll be **churning out multiple avatars representing the different segments of your market.**

Don't go overboard, but any lucrative market segment with a distinct set of goals, sources of information, pain points, etc. is deserving of a customer avatar.

Use the Customer Avatar Worksheets below (there are male and female versions) to get clear on your ideal customer.



The form is titled "CUSTOMER AVATAR" in a green banner at the top. Below the banner is the text "AVATAR NAME". The form is divided into several sections:

- GOALS AND VALUES**: A box containing "Goals:" and "Values:".
- CHALLENGES & PAIN POINTS**: A box containing "Challenges:" and "Pain points:".
- SOURCES OF INFORMATION**: A box containing "Books:", "Magazines:", "Blogs/Websites:", "Conferences:", "Gurus:", and "Other:".
- OBJECTIONS & ROLE IN PURCHASE PROCESS**: A box containing "Objections to the sale:" and "Role in the Purchase Process:".

In the center of the form is a silhouette of a person's head and shoulders. To the right of the silhouette are several demographic and personal information fields:

- Age:
- Gender:
- Marital Status:
- #/Age of Children:
- Location:
- Quote:
- Occupation:
- Job Title:
- Annual Income:
- Level of Education:
- Other:

At the bottom center of the form is the logo for "DIGITALMARKETER".

[Click the image to download and fill in your customer avatar!](#)

# CUSTOMER AVATAR

AVATAR NAME

## GOALS AND VALUES

Goals:

Values:

Age:

Gender:

Marital Status:

#/Age of Children:

Location:

## CHALLENGES & PAIN POINTS

Challenges:

Pain points:



## SOURCES OF INFORMATION

Books:

Magazines:

Blogs/Websites:

Conferences:

Gurus:

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Quote:

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Level of Education:

Other:

## OBJECTIONS & ROLE IN PURCHASE PROCESS

Objections to the sale:

Role in the Purchase Process:



[Click the image to download and fill in your customer avatar!](#)