

MARKETING KITCHEN

PERSONA DEVELOPMENT



A close-up portrait of a young woman with light brown eyes and numerous freckles. She is looking directly at the camera with a neutral expression. Her right hand is resting on her chin, with her fingers slightly curled. The background is a soft, out-of-focus grey. The text 'PERSONA DEVELOPMENT' is overlaid in the center of the image in a bold, white, sans-serif font.

PERSONA DEVELOPMENT

WHAT'S A PERSONA?

A (semi)-fictional character created to represent a customer that might use a product, site, brand, or in a similar way.

Marketers may use personas together with market segmentation, where the qualitative personas are constructed to be representative of specific segments.

Sometimes known as a Segment, Pen Portrait, User Persona, Sales Persona.

WHY DO THEY MATTER

Forces marketers to think from a customers perspective.

Helps to prioritise who to target (and who not to target).

Informs what the business should be doing (and not doing) to help and reach potential customers.

Provides focus for marketing to specific audiences.

Creates direction and structure for content, messaging channels, creative, activity, budgeting, measurement.

EXAMPLE PERSONAS: CAT

Customer segment profile

02. Savvy Entrepreneur

OVERVIEW

The **Savvy Entrepreneur** is an experienced business owner, having started his successful business from scratch many years ago or inherited it from his parents who founded the business. He's more hands off these days, focusing on business development and networking. He's a people person, and makes decisions based on good advice from people he knows and trusts.



Who are they?



DESCRIPTION

- A small / medium size business owner who has successfully grown a good solid business with a strong reputation and customer base and good margins
- Takes a more traditional approach to business and relies on trusted people, networks and relationships to do business
- They are more hands off these days and rely on key employees to manage the day to day operations but occasionally jumps on the machines to help out .
- Is intuitive and instinctive and likes to do a deal. They keep a close eye on the finances.

MOTTO

“I trust those closest to me”

MINDSET

- Values: Simplicity
- Needs: Good advice
- Wants: Human connection

HOW TO ENGAGE

- Persuade them

CAT'S ROLE

- Make their life easy
- Become a trusted partner

EXAMPLE PERSONAS: CAT

Business



TYPICAL BUSINESS

- Most likely: landscaper, general builder, house construction, farmer
- Likely to have 2-20 employees

AMBITION

- To keep the sales pipeline full, whilst maintaining the size and current complexity of the business (not grow)
- To increase the profitability of his business.
- To keep their employees happy and productive
- To take further steps away from the business (or retire early) to pursue other interests

ROLE AND RESPONSIBILITY

- Business owner with several employees to manage
- Splits their time between the site and the office
- Spends a lot of time networking and developing the sales pipeline
- Will ultimately be responsible for signing off all purchases and paying bills

KEY BUSINESS CHALLENGE

- They rely on their trusted employees to manage the day to day operations - they value them and treat them well
- Their core challenge is attracting and retaining good people and trust
- They like simplicity and business techniques and avoid digital communication where possible



Characteristics



EXAMPLE PERSONAS: CAT

Purchasing behavior



PURCHASING PRIORITIES

- Proximity and proactivity of dealer is important
- Efficiency is important - time is money
- Getting a good deal
- Predictability and visibility of business costs
- Ease of operation is important as he may need several / new employees to all be able to use it quickly and efficiently
- Productivity is key

PURCHASING BARRIERS

- Initial cost
- Poor experience with dealer / salespeople
- Concerns over ongoing costs

KEY BUSINESS CHALLENGES

- They trust their longstanding employees to make the right call
- If they have a positive experience and relationship with the dealer, they will trust them to make recommendations, and seek them out first for future purchases
- Will unlikely do much online research will likely only look at dealer / manufacturer websites
- Is unlikely to use social media for work activity
- Will rely on peers, partners and suppliers and advice on new products and dealers
- Will mainly communicate with people on the phone



Perceptions and preconceptions



VIEWS OF CAT

- Has little awareness of Cat today or any other brand or manufacturer
- Relies on their trusted operator / employees to recommend what to buy, but will do the deal themselves
- Will judge Cat by the personal interactions they have with the dealer and salespeople
- They see the potential in the Cat brand to help them attract and retain good talent

VIEWS ON MACHINES

- They likely own a range of other machines from other manufacturers dependent of the deals available at the time
- They see machines as a liability not an asset
- Is less spec oriented and is looking for the simplest and cheapest machine to do the job
- They don't have the time, knowledge or inclination to shop around themselves

EXAMPLE PERSONAS: BLACKBERRY



Rising Stars – 45% Winnables

Rising Stars are well educated metropolitan professionals. Work is the most important thing in their lives, they are very ambitious and constantly on the go. They are regularly upgrading their phones and need to be constantly available to others. They are BlackBerry's core target.

- Who Are They?
 - 60% 25-54 years old
 - Most up-market (41% AB)
 - Most educated (46% at least a degree)
 - Most professional (28% mid- or high-level professionals)
 - Most metropolitan (62% live in cities)
- Technology / Communication Habits and Needs
 - Spend a lot of time out of the office
 - Mobile phone dependent – is a lifeline
 - Upgrades most often of all groups
 - Heaviest caller and high texters
 - Heaviest internet user
 - Little time for TV – lightest viewer
 - Least price sensitive
 - Early adopter of new technology
 - Into qwerty
 - More interested in push email than most
 - Want an all in one device for work and personal use.

BlackBerry 18

Gen C Trendies – 35% Winnables

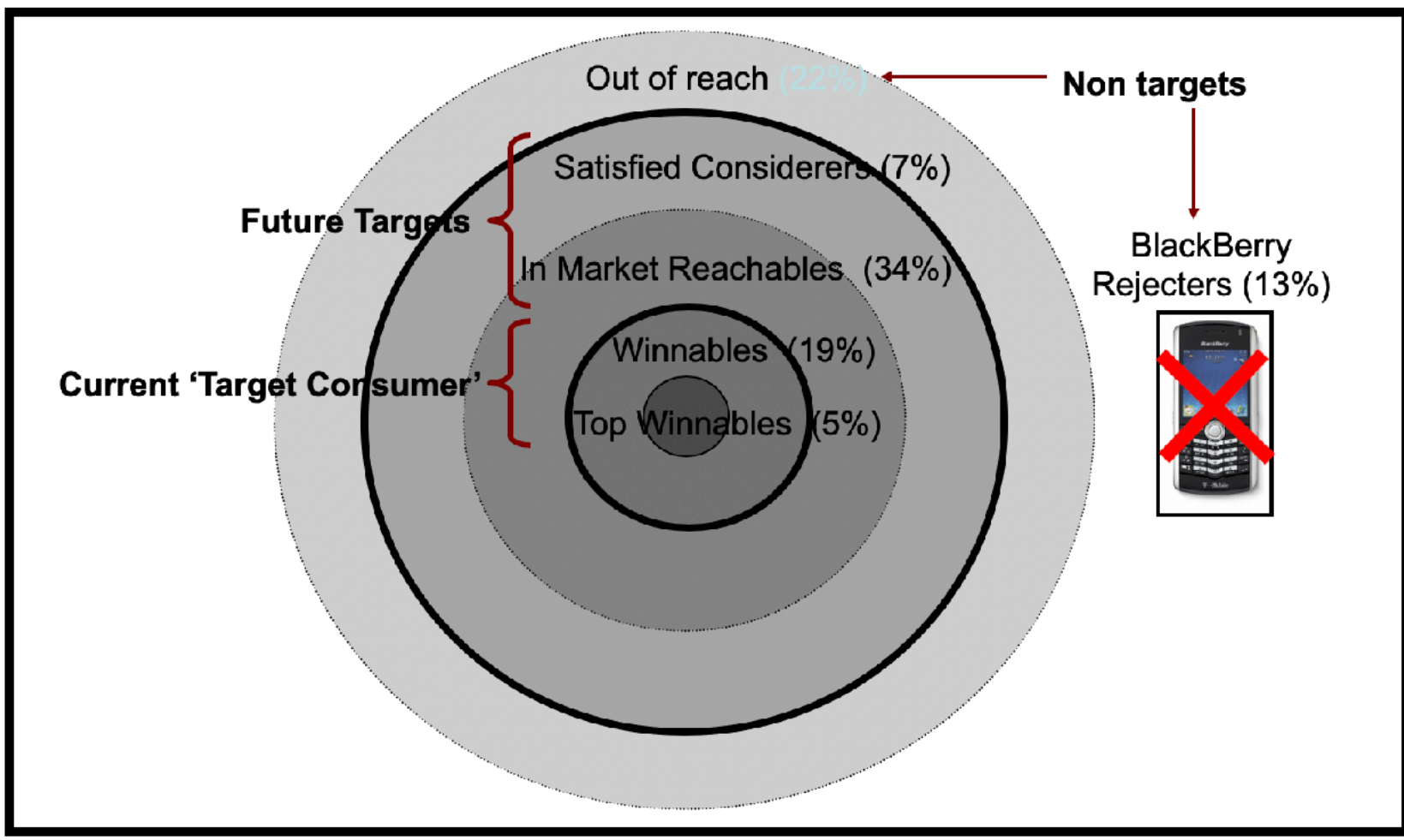
Gen C Trendies are young, into popular culture, music, film, the internet; are outgoing and have an active social life. Tech savvy, they're always on the go but are not necessarily mobile phone dependent.

BlackBerry 19

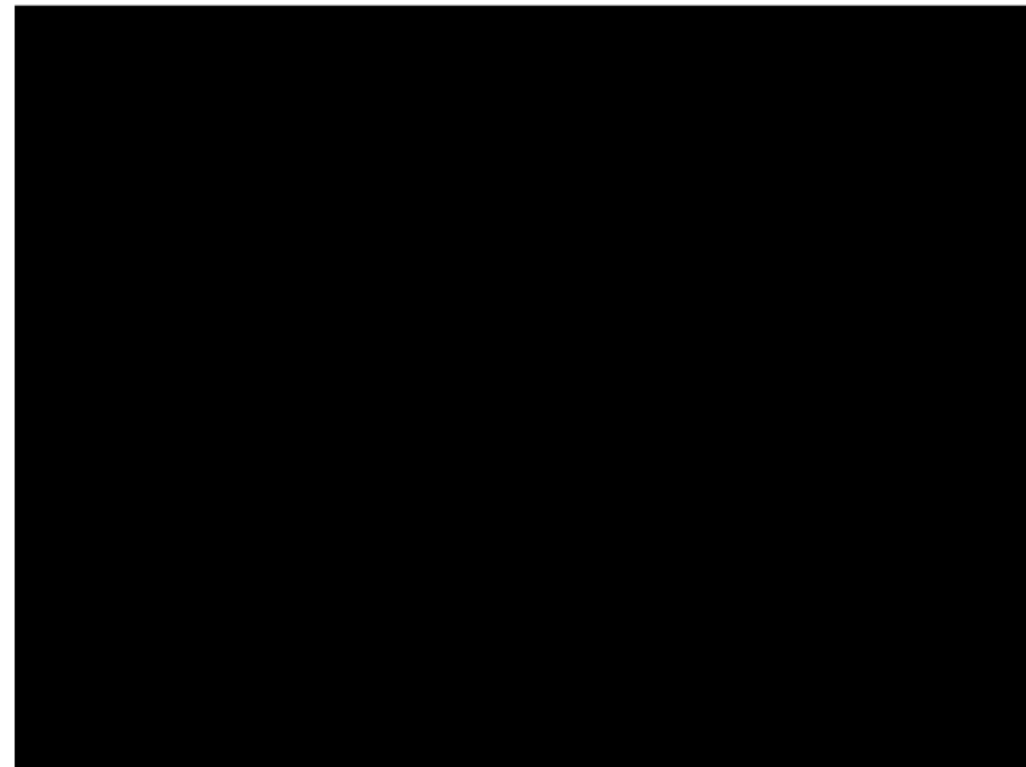
Data Heroes – 34% Winnables

Data Heroes are young, into popular culture, music, film, the internet; are outgoing and have an active social life. Tech savvy, they're always on the go but are not necessarily mobile phone dependent.

BlackBerry 20



EXAMPLE PERSONAS: BLACKBERRY



EXAMPLE PERSONAS: BLACKBERRY

“The Remarkables” were created to communicate our five key consumer segments in a fun and easy to digest way.

Each segment takes on the guise of a superhero, each with their own attributes - likes/dislikes, demographics, work/life habits, technology usage and their feelings towards the Blackberry brand.

The five consumer segments, like their superhero personas are very different - this presentation will give you a key insight into who our key segments are, how they differ from one another and how they should be targeted.



EXAMPLE PERSONAS: BLACKBERRY



EXAMPLE PERSONAS: BLACKBERRY

RISING STAR



RISING STAR

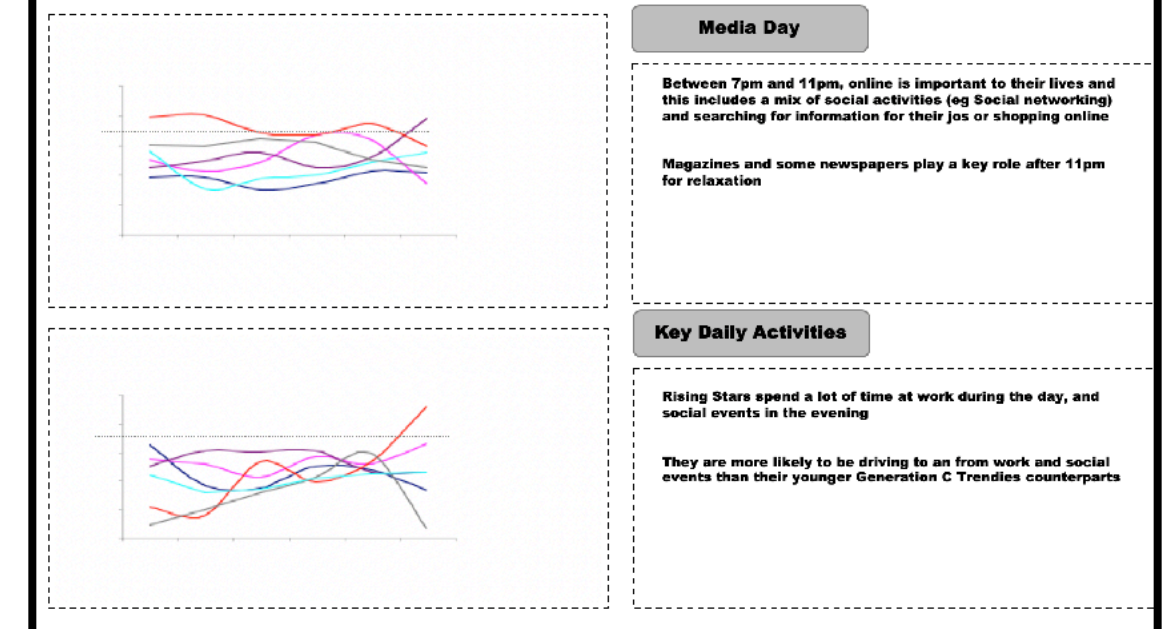
Rising Stars are well-educated metropolitan professionals. Work is the most important thing in their lives, they are very ambitious and constantly on the go. They are regularly upgrading their phones and need to be constantly available to others. They are BlackBerry's core target.

DEMOGRAPHICS/LIFESTYLE

RISING STARS

- 60% 25-54 years old
- Most up-market (41% AB)
- Most educated (46% at least a degree)
- Most professional (28% mid- or high-level professionals)
- Most metropolitan (62% live in cities)

RISING STARS "DAY IN THE LIFE"



RISING STARS: INTERESTS

Evenings out

- 43% Enjoy going out with friends
- 44% Like to eat at nice restaurants
- 21% Are regular cinema goers

Keeping in touch

- 40% Say its important their household is equipped with the latest technology
- 39% Say to do my shopping by internet makes life easier
- 37% I cannot do without mobile communication
- 40% love buying new gadgets to keep in touch

Friends

- 31% Say they like to be surrounded by different people, cultures, ideas and lifestyles
- 49% Say that people come to them for advice before buying new things
- 80% Like to be respected by their peers

Living life

- 34% Say rules are meant to be broken
- 40% Say they worry about work in their leisure time
- 41% Say they would like to set up their own business



RISING STARS - SUMMARY

Key facts:

Rising Stars are the most prolific and savvy users of the internet and for a mix of social and work based activities

A mobile is an extension of how they keep in touch, using email and internet extensively - they also IM intuitively on both the mobile and in an online environment

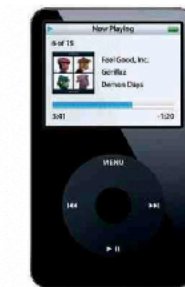
Whilst online is important in the early evenings the Rising Stars often relax in the late evenings with more traditional media such as magazines and newspapers

Rising Stars are also light traditional media users - outdoor and cinema consumption is high

Whilst MP3 / iPod ownership is high, Rising Stars are embracing the more technical features of the mobile as they seem comfortable using them both for work and pleasure

Music is important for leisure time but their minds are stimulated by far more issues, work is one of these

BRANDS THEY BUY



EXAMPLE PERSONAS: BLACKBERRY

THE R.O.C. RESEARCH ON CONSUMERS

HOME INTRO PROFILES RESEARCH PRODUCTS NEWS PDF COMPILER LOG OUT

REMARKABLES

GETTING STARTED
INTRO

WHO ARE THEY?
PROFILE

FACTS AND FIGURES
RESEARCH

REGIONAL NEWS
READ THE LATEST REPORTS ON REMARKABLE ACTIVITY FROM OUR BLACKBERRY OPERATIVES IN SPAIN
READ MORE

FIONA'S BLOG
ALL THE LATEST NEWS, VIEWS AND OPINION FROM BLACKBERRY'S DIRECTOR OF SEGMENTATION, FIONA NAUGHTON
FIND OUT MORE

MEET REAL REMARKABLE CONSUMERS

WELCOME TO THE ONLINE RESOURCE FOR ALL THAT IS THE REMARKABLES - BLACKBERRY'S REMARKABLE CONSUMER SEGMENTS. WHETHER YOU WANT TO LEARN HOW TO SPOT THEM, WORK OUT HOW TO TARGET THEM, OR NEED HARD FACTS AND FIGURES, YOU CAN FIND IT ALL HERE.

UNLOCK YOUR SUPERPOWERS!

CLICK HERE TO TAKE THE TEST AND FIND OUT WHICH ONE OF BLACKBERRY'S SUPER CONSUMERS YOU ARE!

BOLD
THE NEW BLACKBERRY BOLD REALLY PUSHES A WISING STARS BUTTONS
READ MORE

LIFETIME
WHICH REMARKABLE NEEDS TO BE CONSTANTLY AVAILABLE TO OTHERS AND IS DEPENDENT ON THEIR MOBILE PHONE?
FIND OUT MORE

LOREM
WHICH REMARKABLE NEEDS TO BE CONSTANTLY AVAILABLE TO OTHERS AND IS DEPENDENT ON THEIR MOBILE PHONE?
FIND OUT MORE

NEWS

CHECK OUT VIDEO CLIPS OF BLACKBERRY USERS FROM EACH OF OUR REMARKABLE CONSUMER SEGMENTS ACROSS EUROPE!

EXAMPLE PERSONAS: BLACKBERRY

THE R.O.C. RESEARCH ON CONSUMERS

HOME INTRO PROFILES RESEARCH PRODUCTS NEWS PDF COMPILER LOG OUT

REMARKABLES

RISING STAR
 Age: 26
 Occupation: Sales Director
 Soaring high above the metropolitan skyline is Rising Star – a real flyer. Able to be in one place one second, somewhere completely different the next, they move with incredible speed. This natural dynamism is enhanced by a determination to stay up-to-date with the latest information and technology – the true source of their relentless energy. Stylish yet discreet, Rising Star often takes on the appearance of a successful urban professional.

VIEW KEY FACTS

DID YOU KNOW...
 34% OF RISING STARS SAY RULES ARE MEANT TO BE BROKEN

TECHNOLOGY & COMMUNICATION
 Need to be constantly available to others
 Dependant on mobile phone - is a lifeline, wants an all in one work and personal phone
 Upgrades the most often
 Early adopter of new tech...
 Need to be constantly available to others

CALLS TEXTS EMAIL INTERNET

BRANDS
 PHILIPS FINANCIAL TIMES Audi

FRIENDS
 Need to be constantly available to others
 31% Say they like to be surrounded by different people, cultures, ideas and lifestyles
 9% Say that people come to them for advice before buying new things
 80% Like to be respected by their peers

THE R.O.C. RESEARCH ON CONSUMERS

HOME INTRO PROFILES RESEARCH PDF BASKET FEEDBACK

REMARKABLES

GEN C TRENDY
 Age: 21
 Occupation: Account Executive, Advertising
 Found amongst young, outgoing people with hectic social lives, Gen C Trendy has the ability to influence all those who seek their opinion. This influence comes through consuming an endless amount of pop culture, meaning Gen C Trendy is always up to date with the latest entertainment, music and films. Mobile data and home broadband are their lifelines - Gen C Trendy's power would diminish if disconnected for even a moment.

VIEW KEY FACTS

DID YOU KNOW...
 GEN C TRENDIES SAY THEY LOVE BUYING NEW GADGETS TO KEEP IN TOUCH

TECHNOLOGY & COMMUNICATION
 Need to be constantly available to others
 Like to stay in touch and on top of everything.
 Second most frequent upgrader after Rising Star.
 Likely to be first with new technology and will spend money they don't have.

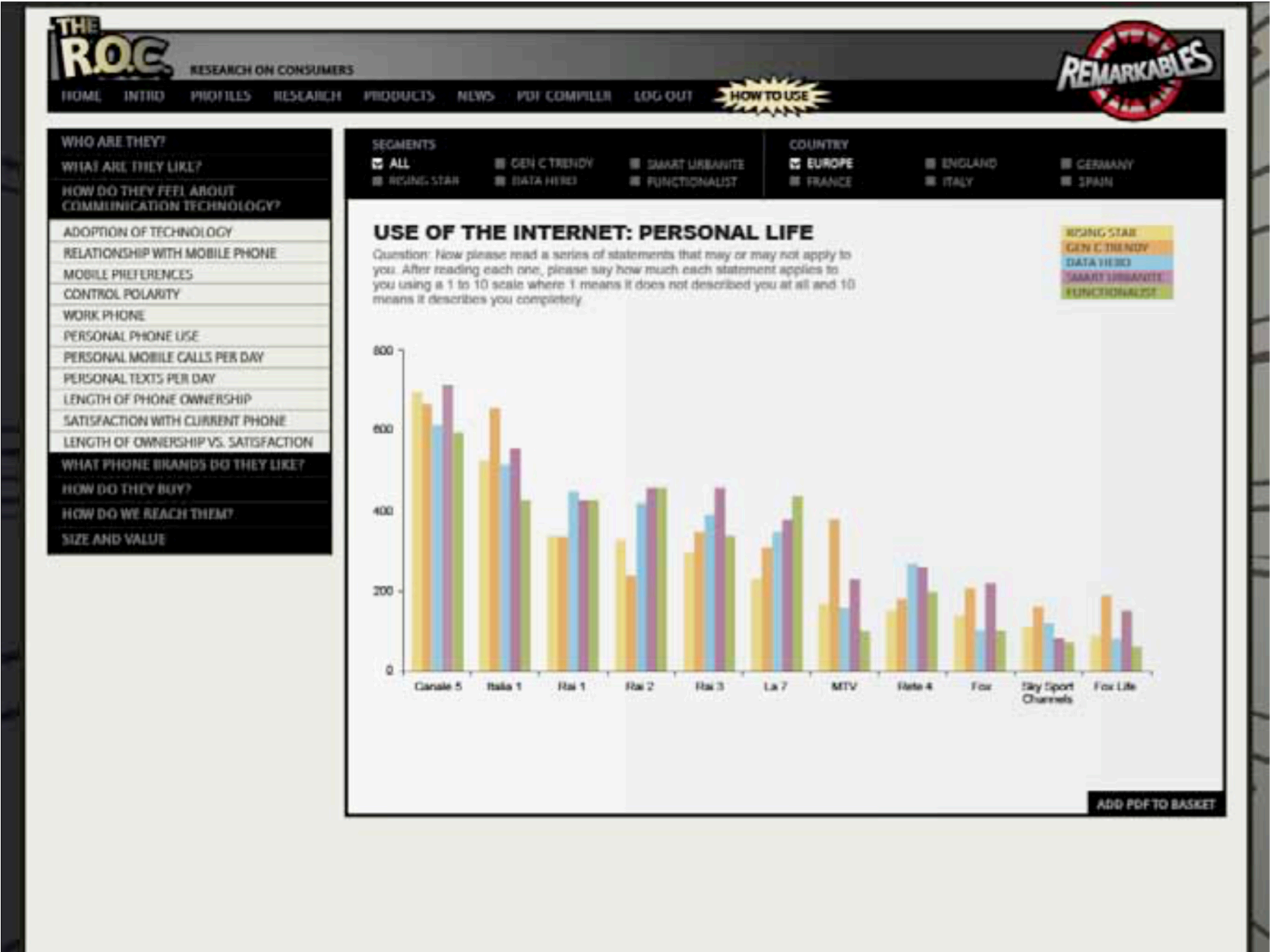
CALLS TEXTS EMAIL INTERNET

Brands
 NIKE

Friends & Family
 They spend a lot of spare time with their friends everyday.
 Say that people come to them for advice before buying new things.
 Say they have a close circle of friends who support me in hard times

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EXAMPLE PERSONAS: BLACKBERRY



EXAMPLE PERSONAS: LEGO EDUCATION



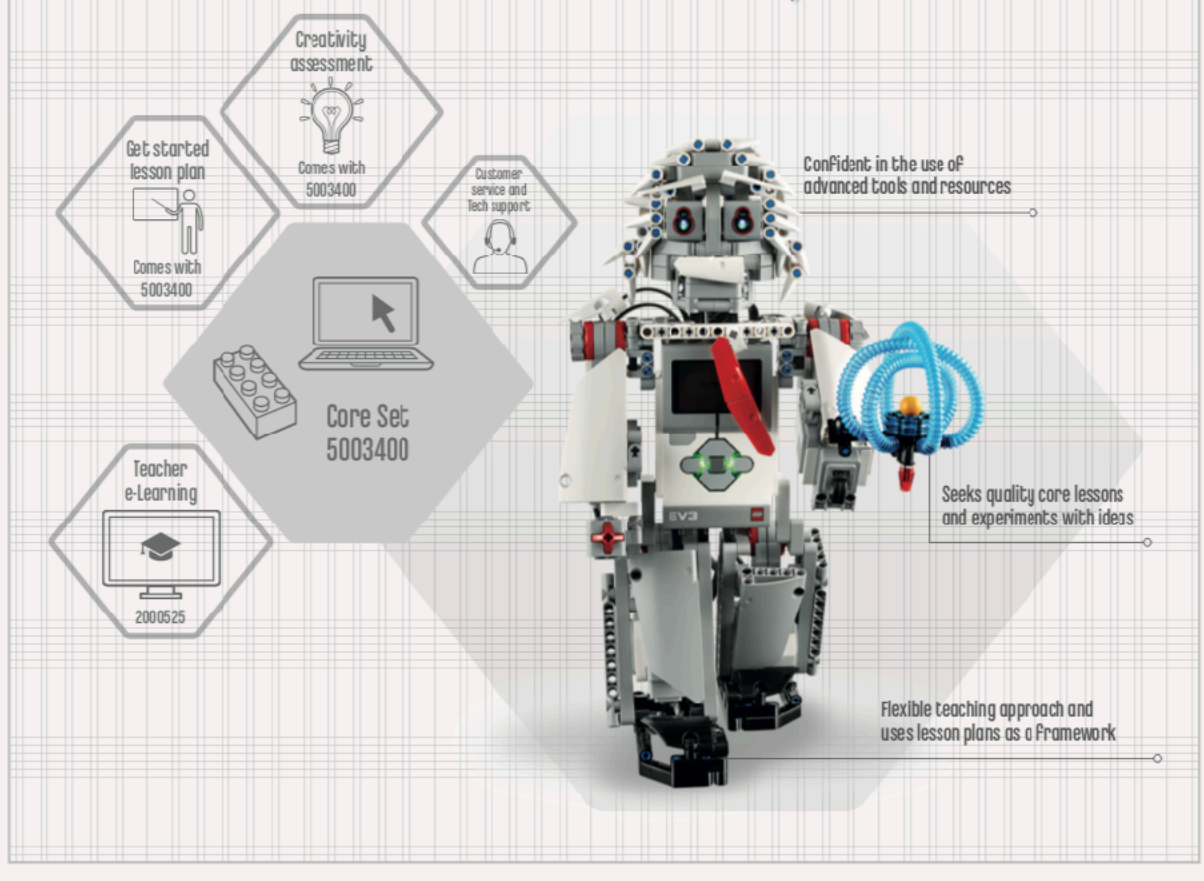
Core Solution

**“Logic will get you from A to B.
Imagination will take you everywhere.”**
Albert Einstein

Do you think like Albert?

The Core Solution is a flexible and versatile solution with core functionalities for personalized teaching.

“I always know how every lesson will start and finish. But teaching is an interactive process, so I like the way that the Core Solution gives me the freedom as well as the tools to do my job.”



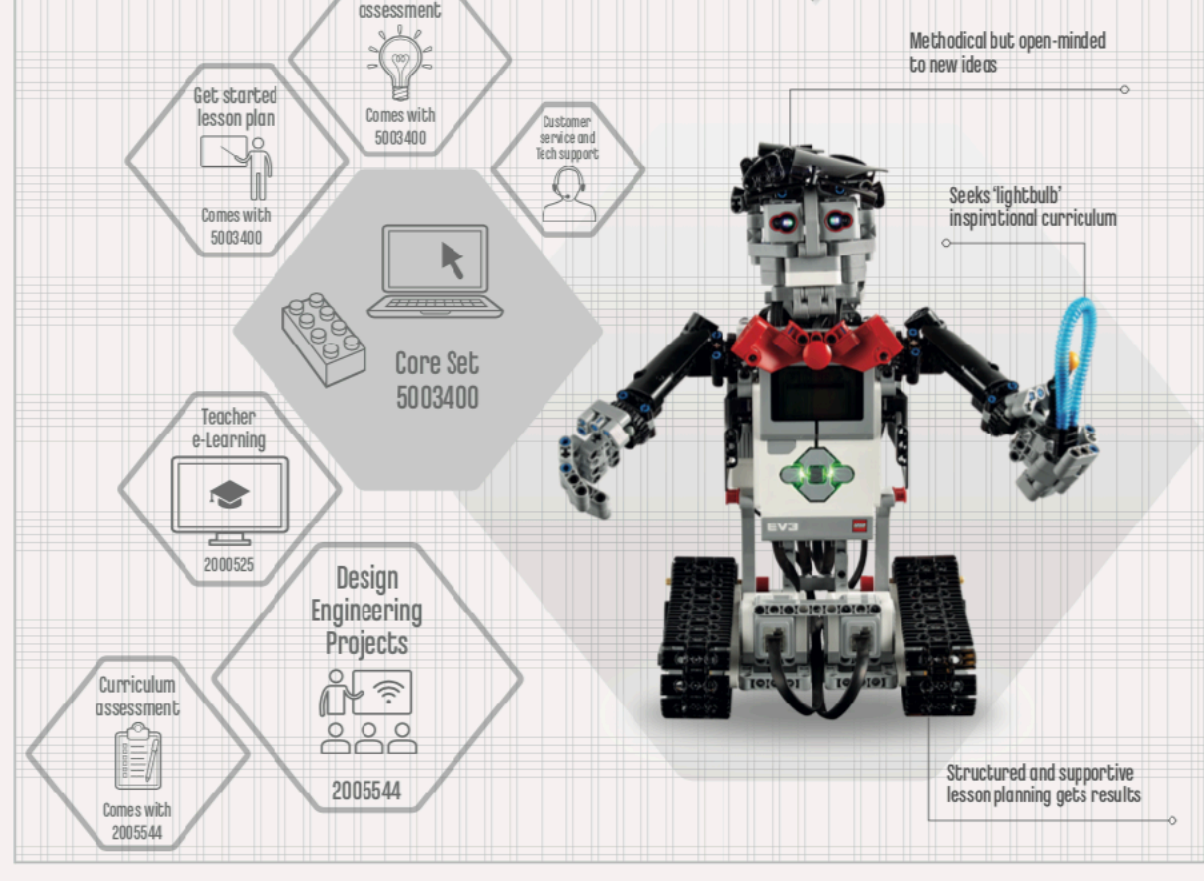
Curriculum Solution

**“Genius is 1% inspiration,
99% perspiration.”**
Thomas Edison

Do you think like Thomas?

The Curriculum Solution is an easily implementable solution with guidance and support for confident teaching.

“The Curriculum Solution provides a clear framework that helps me to plan every STEM lesson – and to feel confident that my students will both understand and achieve our goal.”



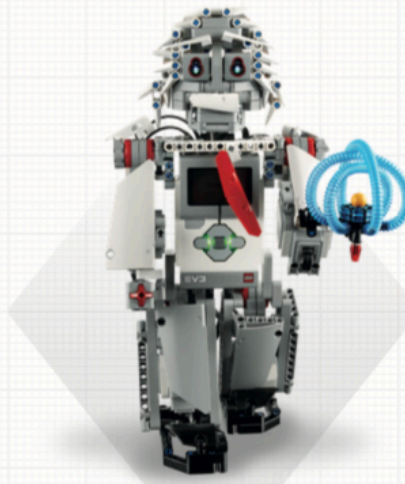
EXAMPLE PERSONAS: LEGO EDUCATION

Classroom Solutions

Core Solution

The LEGO® MINDSTORMS® Education EV3 Core Solution is a flexible and versatile solution with core functionalities for personalized teaching. In this solution, you get:

- EV3 Core Set (5003400 - one per two students) containing LEGO building bricks, the EV3 Intelligent Brick with motors and sensors
- EV3 Software for intuitive programming and data logging including **Get Started Lesson Plan** and **Creativity Assessment** tool (part of 5003400)
- Online **Teacher e-Learning** (2000525 - school license)



Core Solution Core Set = 1 per every 2 students		
8 Students (4 sets)	5005021	\$00.00
16 Students (8 sets)	5005022	\$00.00
24 Students (12 sets)	5005023	\$00.00
30 Students (15 sets)	5005045	\$00.00

Save as much as \$44,300

Curriculum Solution

The LEGO® MINDSTORMS® Education EV3 Curriculum Solution is an easily implementable solution with guidance and support for confident teaching. In this solution, you get:

- EV3 Core Set (5003400 - one per two students) containing LEGO building bricks, the EV3 Intelligent Brick with motors and sensors
- EV3 Software for intuitive programming and data logging including **Get Started Lesson Plan** and **Creativity Assessment** tool (part of 5003400)
- EV3 Design Engineering Projects Curriculum (2004455 - school license) with 30+ hours of classroom instruction and problem-solving activities including **assessment** tools linked to STEM curriculum standards
- Online **Teacher e-Learning** (2000525 - school license)

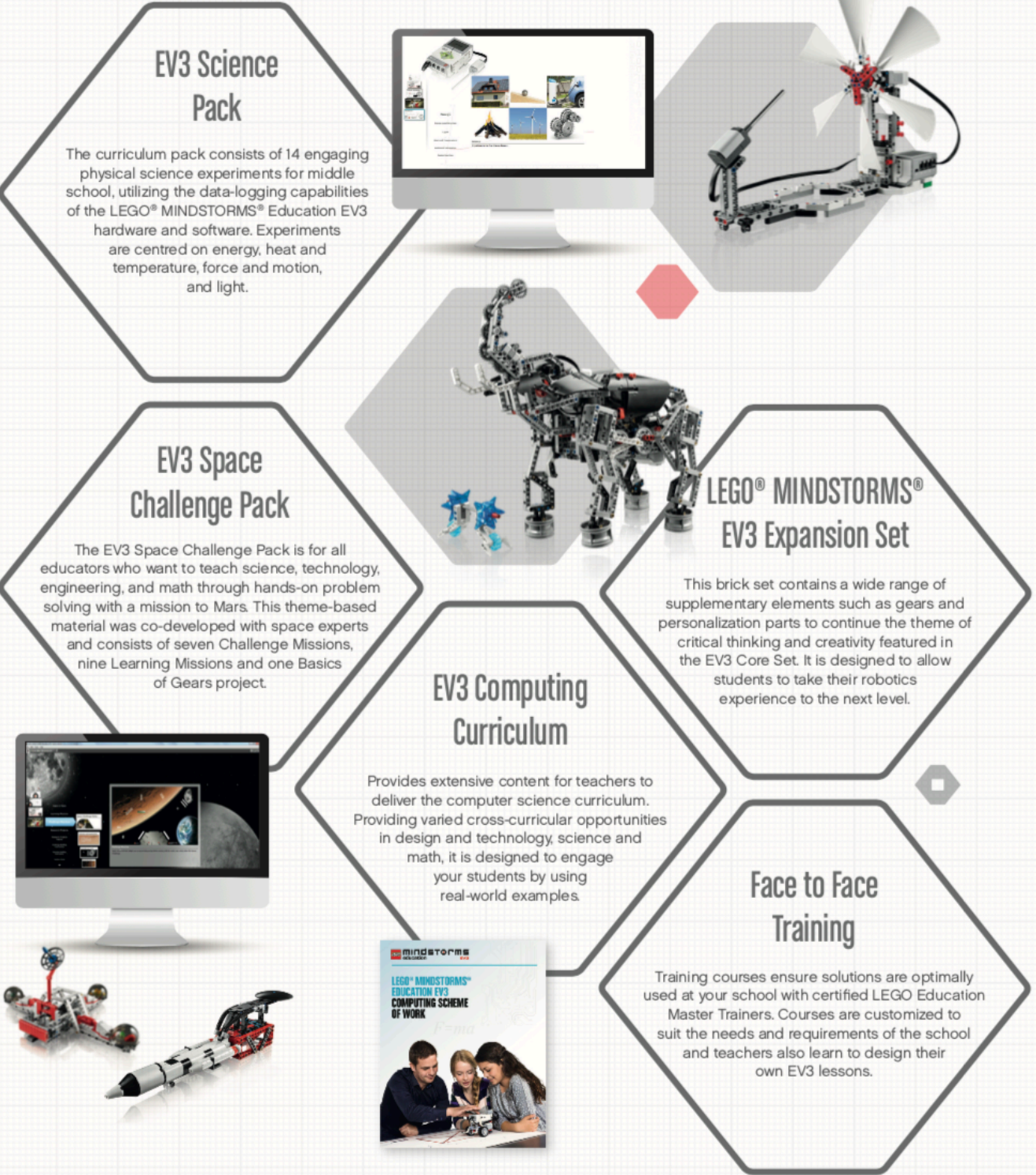


Curriculum Solution Core Set = 1 per every 2 students		
8 Students (4 sets)	5005024	\$00.00
16 Students (8 sets)	5005025	\$00.00
24 Students (12 sets)	5005026	\$00.00
30 Students (15 sets)	5005046	\$00.00

Save as much as \$44,300

Create your own customized solutions

While the Core and Curriculum Solutions offer all you need to get started, you can add an extra dimension to your lessons with three additional curriculum packs, expansion brick set and face-to-face teacher training.



HOW DO WE CREATE A PERSONA

In the absence of data, think of people you know who fit the customer groups you are targeting.

Start with their mindset and attitudes, and behaviours and define them by these attributes rather than demographics.

Define relevant headings and develop descriptions and information for each.

Refine, develop, iterate - pull them apart to ensure each is distinctive.

Think about how you can illustrate or bring them to life in creative and interesting ways

EXAMPLE INFORMATION

Description / overview
Key attributes
Personality traits
Brands they buy
Family situation
Employment situation
Mindset
Existing opinions and perceptions
Needs and wants
Personal values and ambitions

Media consumption
Technology adoption
Purchasing priorities
Purchasing barriers
How we reach them?
How we convince them?
What can we offer them?
How winnable are they?
Etc.

MARKETING KITCHEN

Prepared by AB for Caterpillar
All content is confidential and not to be shared.
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