

CUSTOMER PERSONA WORKSHEET

Describe the Customer in your own words (no more than 200 words)

1. Basic Info

Field	Response
Persona Name	
Age Range	
Job Title & Role	
Industry	
Company Size	
Location	
Income Range	
Education Level	
Career Stage (early, middle, senior)	

2. Professional Context

Field	Response
Key Responsibilities	
Daily Tasks & Challenges	
Success Metrics / KPIs	
Tools & Platforms Used	
Team Structure (reports to, manages, peers)	
Decision-Making Power	
Work Environment (remote, hybrid, in-office)	

3. Goals & Motivations

Field	Response
Primary Work Goals	
Short-Term Objectives	
Long-Term Objectives	
Career Aspirations	
Success Indicators (how they define "wins")	
Personal Motivators (recognition, growth, impact)	

4. Pain Points

Field	Response
Operational or Strategic Challenges	
Common Roadblocks (time, budget, resources)	
Skill or Knowledge Gaps	
Tools or Workflows Issues	
Risks to Avoid	
Industry Constraints	

5. Buying Behavior

Field	Response
Research Methods (search, referrals, reviews, etc.)	
Buying Channels	
Decision Process	
Timeline	
Budget Influence	
Past Experiences	

Triggers & Trust Signals (free trials, guarantees, etc.)	
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6. Decision Criteria

Field	Response
Key Purchase Drivers (ROI, ease of use, support, etc.)	
Must-Have Features	
Nice-to-Have Features	
Objections	
Deal-Breakers	
Role of Social Proof (case studies, testimonials, awards)	

7. Messaging Hooks

Field	Response
Preferred Tone (formal, analytical, conversational, bold)	
Key Phrases	
Brand Values	
Top Benefits	
Effective Stories	
Pain Points to Highlight	

8. Content & Learning Preferences

Field	Response
Content Formats (blog, video, podcast, webinar)	
Trusted Sources (influencers, publications, peers)	
Learning Style (visual, auditory, hands-on)	
Social Media Behavior (platforms, usage, engagement style)	

9. Customer Journey Stage

Field	Response
Awareness: How do they first discover solutions like yours?	
Consideration: What comparisons or research do they do?	
Decision: What final factors push them to buy?	
Onboarding: What do they expect post-purchase?	
Retention: What builds loyalty or drives churn?	