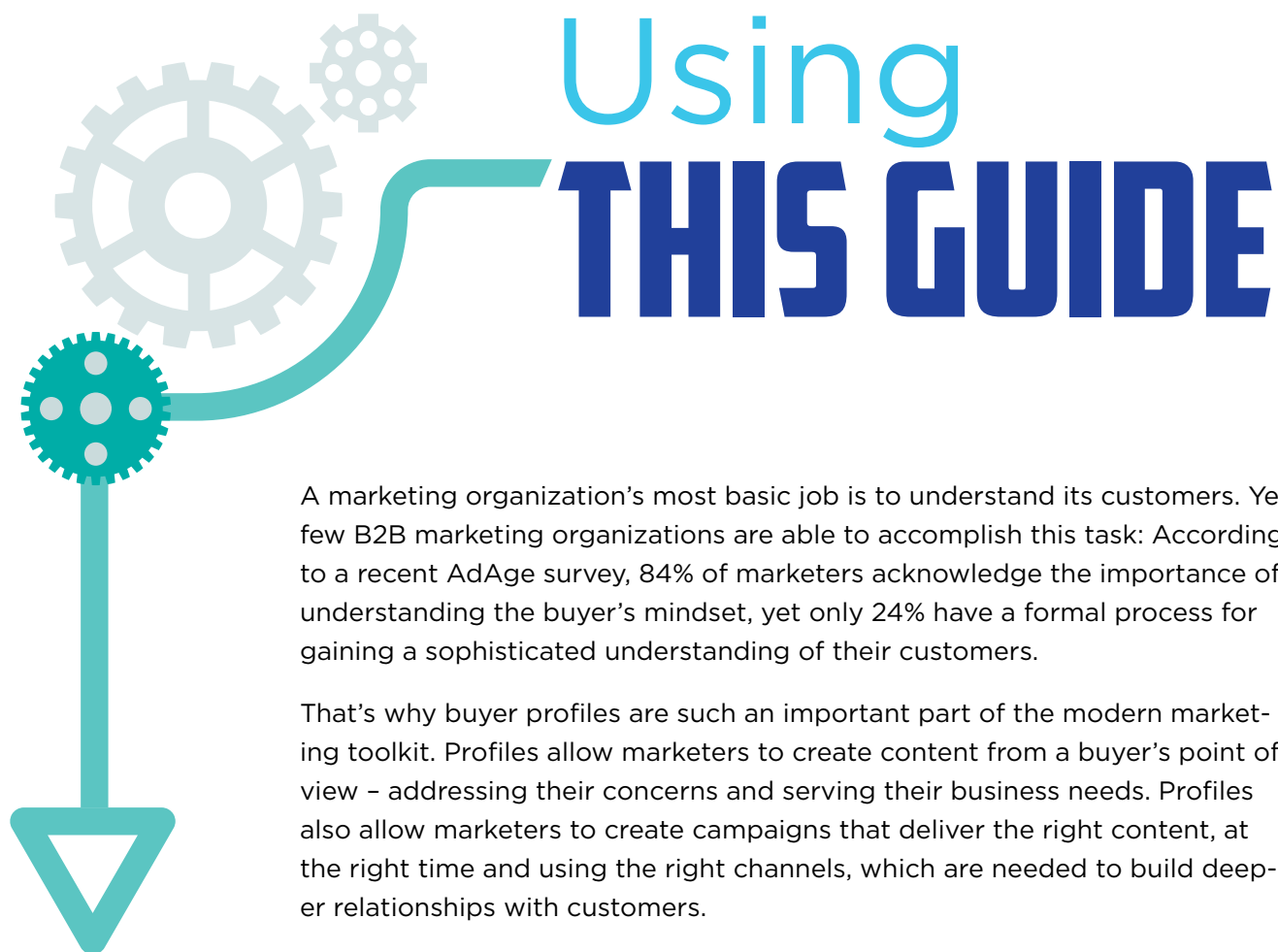


Buyer Profile **PLAYBOOK**





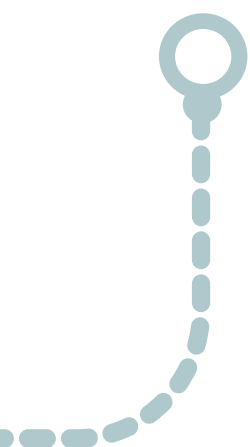
Using **THIS GUIDE**

A marketing organization's most basic job is to understand its customers. Yet few B2B marketing organizations are able to accomplish this task: According to a recent AdAge survey, 84% of marketers acknowledge the importance of understanding the buyer's mindset, yet only 24% have a formal process for gaining a sophisticated understanding of their customers.

That's why buyer profiles are such an important part of the modern marketing toolkit. Profiles allow marketers to create content from a buyer's point of view – addressing their concerns and serving their business needs. Profiles also allow marketers to create campaigns that deliver the right content, at the right time and using the right channels, which are needed to build deeper relationships with customers.

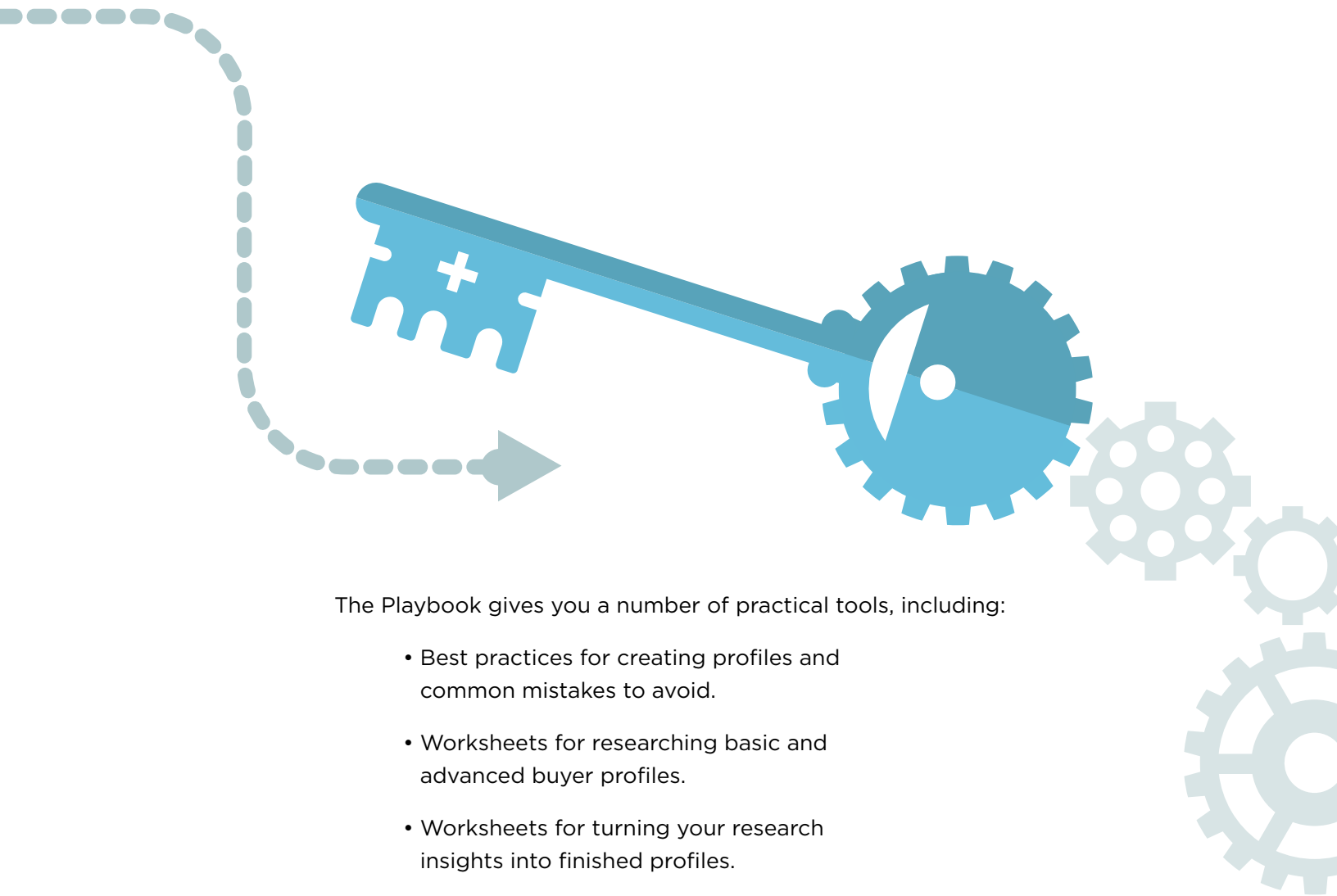
84%

of marketers acknowledge the importance of understanding the buyer's mindset



The C4D Buyer Profile Playbook supports your ability to create and use profiles on two levels:

- First, the Playbook offers a **quick-start solution** for B2B marketers that are just getting started with a formal buyer profile process. We'll show you how to build basic profiles that can support robust content and successful multi-touch campaigns.
- Second, the Playbook provides a roadmap to **take basic buyer profiles to the next level**. We'll discuss how to build out your profiles in ways that add useful detail and actionable insights.



The Playbook gives you a number of practical tools, including:

- Best practices for creating profiles and common mistakes to avoid.
- Worksheets for researching basic and advanced buyer profiles.
- Worksheets for turning your research insights into finished profiles.
- Tips for putting your profiles to work in developing content and campaigns.
- Sample profile templates.



The Content4Demand team is also available to answer your questions and to provide solutions that make your profile projects – and your content campaigns – even more powerful and efficient. Don't hesitate to contact us if you have questions or feedback.



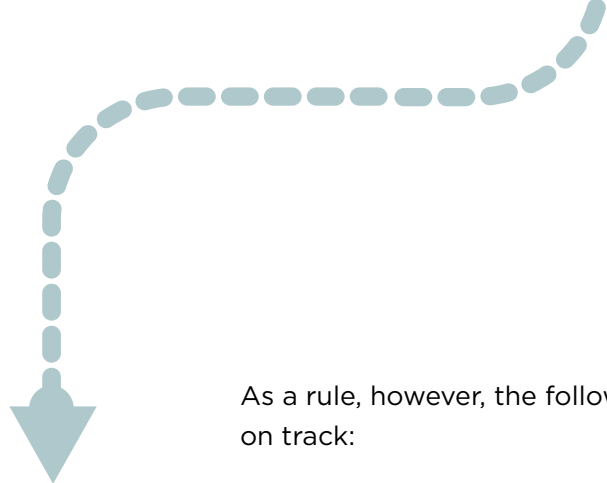
Creating **BUYER PROFILES**

Buyer profiles are evidence-based assets. Marketers typically create them by conducting firsthand interviews (such as phone calls or sales visits) and by mining data sources (such as CRM systems) for relevant and appropriate insights.

Buyer profiles are also living documents. As marketers gather additional intelligence on their buyers, it's important to update profiles and to test them constantly against campaign results.

The most valuable profiles are those that are constantly changing, evolving and improving.

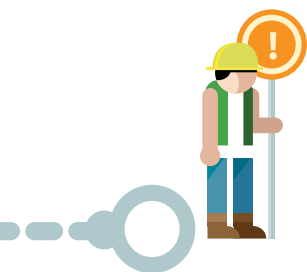
Your choice of research methods, and of the number of interviews you conduct, will depend upon the size of your team, available budget, target market segments and other factors.



As a rule, however, the following best practices will keep your profile project on track:

Best Practices for Creating Buyer Profiles

- **Profiles are always evidence-based.** Don't create profiles with subjective "brainstorming" sessions or by asking a sales colleague to describe her last customer. Identify the questions you want to answer and identify internal or external sources for the data required to answer these questions.
- **Advanced profiles are often based on customer interviews and research.** Given limited time or resources, however, any firm can jump-start its profiles by identifying and gathering data from its CRM, sales automation and other readily available sources.
- **Validate your profiles based on follow-up interviews or focus groups.** Take the feedback from these activities to test and refine your profiles.
- **Prioritize profiles by impact and importance.** Key shot-callers in the buying process, for example, should be a higher priority than influencers.
- **Make specific connections between profiles and content/campaign assets.** Every asset should address some combination of buyer profile and buying stage.



Common Mistakes to Avoid

- **Confusing buyer roles with a buyer profile.** A buyer role is just one part of a complete buyer profile, which adds depth and detail to understanding your customers.
- **Letting profiles get stale.** Refresh your profiles on a quarterly basis and keep testing to gauge effectiveness.
- **Allowing profile projects to get too complex or esoteric.** Profiles should be detailed enough to serve their intended purpose – no more and no less.
- **Not leveraging profiles.** Profiles must serve a bigger strategy – make them a core asset that can be leveraged across multiple sales/marketing activities.

The 10-Question BUYER PROFILE JUMP-START

These questions can be assembled from easily accessible customer data - CRM records, sales team interviews, etc. They're a quick and relatively simple way to populate a Buyer Profile Template for companies that want to score quick wins from a profiling initiative.

1. What are key job titles for your buyers?

2. What industries do they come from?

3. What are their major job duties and goals?

4. What are the major pain points they communicate during the buying process?

5. What objections or barriers to purchase do you encounter with buyers?

6. Do your buyers usually involve their co-workers or superiors in the process?

7. Where do your buyers gather: social media sites, professional forums, events or other “watering hole” locations?

8. How does a buyer request or allocate funds for the purchase?

9. How much research do buyers usually conduct before engaging with your sales team?

10. How and where do you typically engage with buyers during and after the purchase?



DOWNLOAD
WORKSHEET

The Advanced BUYER PROFILE PROJECT

These questions are designed for use with more advanced, research/interview based profile projects. They provide a richer set of insights to populate the Buyer Profile Template in Worksheet 2 below.

Job Title and Job Role Questions

Briefly describe your job duties.

What skills are and what knowledge is essential to doing your job?

Organizational Questions

What department/business unit do you report into?

How many reporting levels are you below the CEO?

To whom do you report?

How many direct/indirect reports do you have?

What other departments are involved in purchasing/business decisions?

Buyer Role/Buying Center Questions

Where in the organization does your budget reside?

What is the job title/function of the person with budget authority for the solution/product in question?

Are you the sponsor/champion of the solution purchase? If you are not the sponsor, who is?

Will you actually use the solution being purchased? If not, who will be the user?

Will you make the final purchasing decision? If not, who will, and what is your relationship to that person?

How many people typically play a role in this type of purchase? What are the key players' job titles?

Will you handle the actual procurement/negotiation of the purchase?

Professional Challenges and Initiatives

What major initiatives or projects are you currently working on?

What are the biggest obstacles to achieving those initiatives?

What are the key failure risks you must address in your job role?

How do you define success at your job, and how is your job performance measured?

How will the solution impact your own job goals and performance?

Interaction Preferences

Describe your preferred method(s) of receiving communications from a vendor.

Describe the things that make you more likely to respond to vendor communications.

Describe the key ways that a vendor establishes a trust relationship with you.

What are your favorite ways of researching vendors and products? (Offer options such as web search, social media and peer recommendations, vendor web sites and industry publications.)

Do you go to vendor web sites for information about a potential purchase?

Do you go to other web sites for this type of information?

What makes you less likely to trust a vendor and/or respond to vendor communications?

Watering Holes

What professional associations or industry groups do you belong to and follow?

Do you pay special attention to certain industry peers, analysts or experts?

What events do you attend and why?

Do you participate in business-related online community discussions or forums?

Do you have an active social network, and does it help you make buying decisions?

What trade publications or journals do you read?

Are there other ways you discuss buying decisions with industry peers or colleagues?



Creating A BUYER PROFILE

The objective buyer profile created in this template will be used to guide your messaging requirements strategy in Worksheet 3 below.

Job title and job role summary

Personal profile snapshot

Organizational sphere of influence

**Buyer role type (Champions/Influencers/Shot-callers/Users/Ratifiers—
a single profile may cover more than one or even all of these roles—
see note below)**

Creating A BUYER PROFILE

Key challenges and initiatives

Interaction preferences

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Watering holes

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Buyer role notes:

Champions: Shepherd the buying process.

Key question: How will the solution impact a business problem that I am tasked with solving?

Influencers: Trusted advisors who play a behind-the-scenes role.

Key question: Will the solution deliver on its promises?

Shot-callers: Makes the final yes-or-no decision, often a CXO level.

Key question: Will the solution deliver ROI?

Users: Impacted by the solution on a day to day basis.

Key question: Will the solution make my work easier and more productive?

Ratifiers: Deals with purchasing, procurement and negotiations.

Key question: will the solution deliver better TCO than other options?



Applying BUYER PROFILES

This worksheet will distill insights from the buyer profile into an action plan for your company's content marketing campaign.

Key pain points relevant to your product/solution

Potential objections to adopting your product/solution

Ways your product/solution can address pain points and objection

Messaging requirements based on buyer role

Messaging requirements based on stage of buying cycle

**Messaging requirements based on Watering Hole insights
(i.e. social strategy)**





BUYER PROFILES in Action

Every company's buyer profiles will be different; some questions may be more important than others, or some questions may not be relevant at all. Profile data can also vary based on a buyer's job role, industry, buying role and other factors.

[The example profile template we're including here](#) is meant to be just that: an example of how these ingredients can combine to create a buyer profile. Use it as a starting point for your own unique buyer profile research and development projects.





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About Content4Demand

Content4Demand is a division of G3 Communications, a B2B firm specializing in e-media and custom content solutions.

Since 2007, we have published Demand Gen Report (www.demandgenreport.com), an e-newsletter that reports on best practices in sales and marketing automation. Because we live and breathe in the space every day, we have an in-depth understanding of demand generation and lead nurturing, and have close relationships with the automation solutions providers that drive the industry today.

Over the past five years, we have used our knowledge of content marketing and our publishing background to grow an expertise in custom content strategy and development. In that time, we have created hundreds of E-books, white papers, webinars, case studies, executive briefs and other forms of custom content for B2B solution providers, such as Oracle, Marketo, Eloqua, SAS, FIS, Citrix, NCR, Hubspot, Salesforce and many more. Our engagements with clients vary from a single piece of focused content to a quarterly or yearly integrated campaign.

With an expertise in publishing content across traditional and emerging channels, we specialize in working with our clients to develop digitally based content that is on point with their messaging and optimized to drive leads and thought leadership.