

Marketing Personas Research

The attached document is a sample of market research I did for a former tech client. The goal was to identify potential attendees to health-tech summits that featured fitness apps and how they could be leveraged by different industries. While the original document was over 30 pages long, I have included a sample of the work below.

To complete this research, I used resources from previous health tech summits as well as LinkedIn Profiles and interviews with high profile individuals and thought leaders in the tech industry.

The original document included 10 Personas and took approximately 35 hours to research and write drafts for review and was nearly 9,000 words. It included not only hard research, but creative writing to bring the fictional personality to light for the ultimate audience: the Senior VP of a leading global electronics manufacturer.

Please contact me if you have any questions.

Judy Ann Michael

JudyAnnMichael.com

Sample Marketing Personas

Contents

- Sample Marketing Personas..... 2**
- 1. CEO – Growing Genomics Fitness App 3**
- 2. VP Total Rewards for Global Company 6**
- 3. Senior Vice President of Customer & Digital Experience at BCBS 9**

1. CEO – Growing Genomics Fitness App

MEET DR. DOUG

Doug became a personal trainer after receiving his degree in Health from a major Midwestern university. Ambitious, he became certified as a personal trainer with a national gym franchise, but after two years became frustrated that he could not help his clients lose weight or build muscle according to the company program. No amount of dedication, dieting, or workouts seem to work for some clients. What was the missing piece? Genetics. He went to medical school to become an internal medicine doctor, discovering how science and technology could create a customized program that would increase the success rate for patients who not only wanted weight loss, but knowledge on how to combat hidden medical landmines in their genes.

Dr. Doug developed FitGen, a DNA-testing platform that eliminates guesswork from fitness and nutrition. With a simple DNA test and an intricate analysis of multiple gene variations, their team of genetic scientists reveal specific traits including metabolic tendencies, dietary sensitivities, fat burning capacity, muscle type, recovery time and more. FitGen then prescribes personalized, week-by-week exercise and nutrition programs based on your genetic profile and wellness goals. Currently, his program is available only from his website with an at-home DNA test, but he is creating an app that helps users monitor and follow a prescribed program. He wants to expand his reach and fulfill his company mission of changing the lives of 1 million people by 2020, and an app on the Global Electronic Mfg app store could help him achieve his mission.

VALUE PROPOSITION FOR GLOBAL ELECTRONIC MFG

FitGen creates a customized diet and exercise program, which differentiates it from other popular weight loss programs. The FitGen app can attract users who want a customized program AND provide professional advice through the Doctors and Experts section of the Global Electronic Mfg Health app.

MESSAGING JARGON FOR DOUG

- Network directly with Global Electronic Mfg Health App platform leaders and decisionmakers
- Gain a competitive edge by learning the next generation of lifestyle apps and vision for the future
- Meet leaders from insurance, global employers, Big Pharma – industries interested in your product to reduce ever-increasing healthcare costs

BENEFITS FOR DOUG TO ATTEND

- Exhibit his app to Global Electronic Mfg decision makers
- Learn key drivers for potential joint ventures from insurance, global employers, Big Pharma and leaders from other industry segments
- Competitive intelligence from other Genomics companies and entrepreneurs

BACKGROUND

- **Demographics.** 45, married, 3 teenaged daughters
- **Education.** BS in Health from Midwestern College, MD in internal medicine from Vanderbilt University.
- **Technology.** Comfortable with technology and the marriage of science and tech.
- **Social.** Belongs to entrepreneurial groups and medical associations
- **Financial.** Has some personal wealth, but needs partners, joint ventures, and VC's to expand company.
- **Health.** Excellent – lives and practices his genetic profile recommendations..
- **Past Attendance.** Attends a mix of medical conferences and entrepreneurial events.

JOB FOCUS

- He is a full time Internal Medicine physician at Johns Hopkins, but is retiring in 12-18 months to devote full time to his growing company
- FitGen is a collaboration with medical school friends and team members who run the business full time.

PRIMARY CONCERNS

- Launching FitGen to a wider audience to fulfill his mission statement and raise funding for FitGen2 app and testing kits.
- Keeping up on genetics applications to fitness and health
- Competitor products

DECISION MAKING POWER/INFLUENCE

- As CEO, he sets the direction for his firm with input from his 3 executive team members.

MOST DESIRED CONTENT

- Healthcare concerns from industry leaders – and FitGen can solve them
- Case studies for DNA testing for health and wellness
- Networking with Global Electronic Mfg decision makers and Big Pharma

SUGGESTED TARGETING

1. Where does this persona gather news and information?
 - Trade journals, digital news, seminars, peers
2. What social networks, groups, and associations is this persona a member of?
 - AMA member, American Society for Human Genetics, Society of Physician Entrepreneurs

KEY QUESTIONS

1. Under what circumstances does this persona think about what you offer?
 - Will it grow my company, helping me to reach my vision of helping 1 million people?
 - Are there potential joint ventures with industry leaders?
2. What industry knowledge does this persona have?
 - Extensive knowledge of medicine and healthcare
 - Knowledgeable of the fitness and weight loss space
3. What common objections and concerns would keep this persona from completing a transaction?
 - I need to know new people and connect with large potential partners.

RESOURCES

<https://www.linkedin.com/in/drdanreardon/>

<https://fitnessgenes.com/about-us/team/>

<https://clarity.fm/danreardon>

<https://www.self.com/story/i-tried-dna-testing-for-fitness-and-weight-management>

2. VP Total Rewards for Global Company

MEET NICK

Nick remembers the day when the benefits department at the Global Travel Firm was called “Compensation”. Now it’s called “Total Rewards”. He knows that the biggest firms rely on their People Departments to create a comprehensive menu of benefits that achieves two goals: 1) keep current employees engaged and in their seats and 2) attract new talent, especially in the tech world. The Total Rewards packages must include the basics like health and disability insurance along with generous time off packages. But those packages are now expected by employees and candidates. Nick is challenged by his Board, and his competitors, to differentiate their Total Rewards packages with valuable offerings that support employees’ unique lifestyles. Health and wellness, finances, and data insights are all apps that can be selected and customized to each employee. And they will have their employer to thank for it. The benefit is a two way street, increasing the overall health of the large employee population and thereby reducing health insurance premiums.

VALUE PROPOSITION FOR GLOBAL ELECTRONIC MFG

Employers like Microsoft, Amazon, Expedia, and Facebook are all desperate to keep employees – especially their tech talent – happy and engaged. By offering the Global Electronic Mfg Health Platform, and its suite of apps, as part of a Total Reward package, Global Electronic Mfg can reach hundreds of thousands of users, on several continents through a handful of large conglomerates through offering a cost effective, customizable benefit.

MESSAGING JARGON FOR NICK

- Engage your workforce with next generation lifestyle apps for health, wellness, and fitness
- Network with brand names leaders from Global Electronic Mfg, FitBit, Blue Cross to understand their vision for the future
- Discover the latest features focused on reducing health care costs for employers

BENEFITS FOR NICK TO ATTEND

- Reviewing the latest offerings in health and lifestyle apps and devices for their Total Rewards portfolio
- Networking with leaders in the device, insurance, and employee benefits space
- Review case studies that prove decrease in health risks, employee absences, and other measures that affect large employee populations.

BACKGROUND

- **Demographics.** 45, mid-career. Worked in benefits at Amazon before moving across town to the Global Travel firm. Married 12 years to Karen, who runs the Microsoft Employees’ store.

- **Education.** Undergraduate degree in business. Member of SHRM and received multiple certifications.
- **Technology.** Knows how to use apps, but doesn't need to know the science behind them.
- **Social.** Serves on high profile charity Boards including the American Cancer Society.
- **Financial.** Financially astute negotiator and investor.
- **Health.** Excellent, a cross-fit aficionado.
- **Past Attendance.** Attends 3-4 benefits conferences and 1-2 health and finance tech conferences annually.

JOB FOCUS

- Creating market-competitive compensation and rewards programs that attract and keep high quality employees.
- Educating employees on the value of the Total Rewards they receive – and how to use them.
- Engaging employees through contests, bonuses, and reward for their work efforts.
- Negotiating with insurance carriers and program vendors for cost-effective insurance plans and incentives.
- Preparing for workforce changes: attrition, retirement, global expansion, multi-generational workforce

PRIMARY CONCERNS

- Nick is challenged with offering a competitive, yet top of the line benefits package to employees at a cost-effective price.
- Nick also knows the benefits of employees engaged with their own health and the reduction in ever-increasing insurance premiums.
- Monitoring the effectiveness of programs: do employees use the benefits the company provides or should they modify or discontinue them?

DECISION MAKING POWER/INFLUENCE

- Nick had decision making ability to authorize new plans and incentives that align with company philosophy and are in budget
- Nick has to get annual budget approval for compensation programs from the CFO and approval by the Board

MOST DESIRED CONTENT

- Proven ways to engage employees
- Innovative employee benefits for large employee populations

SUGGESTED TARGETING

1. Where does this persona gather news and information?
 - Trade papers and online forums
 - Networking events
2. What social networks, groups, and associations is this persona a member of?
 - High profile charity/networking groups
 - SHRM and IFEBP (International Federation of Employee Benefit Plans)

KEY QUESTIONS

1. Under what circumstances does this persona think about what you offer?
 - Will my employees use the app?
 - Will it be effective in controlling costs and improving engagement?
2. What industry knowledge does this persona have?
 - Extreme knowledge of reward programs and benefits.
 - Knows broad range of offerings available.
3. What common objections and concerns would keep this persona from completing a transaction?
 - Does it work?
 - How is it differentiated?

RESOURCES

<https://www.linkedin.com/in/eric-nicholson-1927b14/>

<https://www.policygenius.com/blog/can-a-fitness-tracker-help-you-save-on-health-insurance/>

3. Senior Vice President of Customer & Digital Experience at BCBS

MEET JOEL

Joel's primary focus is to create raving fans of BCBS customers through exceptional digital experiences. Joel was recruited from Amazon because of his history creating experiences that educated, attracted, and gave customers outstanding experiences that far outstripped their competitors. Now in the insurance industry, Joel's goal is to offer their customers – small, medium, and large customers and their employees – digital channels to access their information. He believes in test driving the BCBS website (and their competitors) to understand the digital experience. He uses the mobile apps and promotes hack-a-thons to learn more. Technology is the future for the customers. Joel just wants to make it easy for them to use and to love using it.

But there's one other strategic goal: data. Big Data. At the heart of BCBS is underwriting and claims. Underwriting establishes the premiums that bring in revenue and claims is the biggest expense. If the analysis is done right on both sides, BCBS makes money. If not, there are huge Obamacare-like losses. The more data, and sources they can gather it from, the better BCBS can meet their strategic goals.

VALUE PROPOSITION FOR GLOBAL ELECTRONIC MFG

Large insurance carriers, like the BCBS national network, are ripe for add digital health apps to their platform. First, it improves the customer experience. Second, it adds new offerings that support employers in attracting and retaining valuable employees. Finally, it helps them collect data that directly affects their bottom line.

MESSAGING JARGON FOR JOEL

- Significantly reduce healthcare costs with intuitive apps
- Learn ways to improve customer experience through intelligent design
- Connect with Global Leaders in the Employee Total Rewards space

BENEFITS FOR JOEL TO ATTEND

- Learn the latest lifestyle and health-improving tech trends
- Discover proven technology that drives down healthcare costs and improves experience

BACKGROUND

- **Demographics.** Age 55. Transplanted to Northwest after growing up on the East Coast. Has worked across the US in significant marketing and customer service roles in large organizations. Married, with three adult children.
- **Education.** Liberal arts undergrad and graduate school. Teaches mobile app technology at local state university.

- **Technology.** Astute and self-educated, always approaching it as an end user to understand the experience.
- **Social.** Mainly focused on educating the next generation through the Boys and Girls Club and teaching at the local university.
- **Financial.** Well of and works because he enjoys it. Heading for retirement in 10-12 years.
- **Health.** Great – loves to hike and be outdoors..
- **Past Attendance.** Tech seminar veteran for 3 decades. Attends 3-4 per year.

JOB FOCUS

- Customer. Customer. Customer. Views life from the end user.
- Improving experiences through technology.
- Supporting and achieving corporate goals.
- Working within the bureaucracy to make things better.

PRIMARY CONCERNS

- Know the business. Everyone on his team needs to understand *how* they make money.
- Constantly find ways to build bridges and collaborate. If you haven't built relationships, it's hard to succeed in a large company.
- Be very data-driven. Customer experience can be seen as fluffy if not backed up by data.
- Network with your peers. Do this constantly.

DECISION MAKING POWER/INFLUENCE

- Identifies problems, challenges and opportunities, then works closely with IT SVP to create solutions.
- Cannot force new technology to be built, but must work within the system to make it happen.

MOST DESIRED CONTENT

- Technology experiences that makes the customer (employers and employees) lives better

SUGGESTED TARGETING

1. Where does this persona gather news and information?

- Everywhere – Twitter, Trade Journals, networking
2. What social networks, groups, and associations is this persona a member of?
 - Education and charities that benefit the upcoming generations
 - Multiple technical groups that will help him nurture his network

KEY QUESTIONS

1. Under what circumstances does this persona think about what you offer?
 - Do you have something that will make my customers lives better and easier?
 - Do you offer something that will help me contributed to the strategic goals of the company?
2. What industry knowledge does this persona have?
 - New to insurance industry, but a veteran at apps and digital experiences.
3. What common objections and concerns would keep this persona from completing a transaction?
 - If it doesn't help my customer, or it's too complicated, we don't want it.

RESOURCES

<https://www.premera.com/wa/visitor/about-premera/executives/>

<http://www.zdnet.com/article/yes-insurers-want-your-health-data-but-not-for-the-reason-you-think/>

<http://www.customerbliss.com/value-building-bridges-customer-experience-curtis-kopf-cb7/>