ChiefAdvice

FREE PRINTABLE TEMPLATE

Customer Persona Template

Describe the customer you want to serve: who they are, what they need, what worries them, how they decide and how to speak to them.

PERSONA NAME

BUSINESS OR PRODUCT DATE

Free to print and use for your own business.
chiefadvice.com

START HERE

How to use this template

A persona is a written picture of one type of customer, built from what real customers have told you. Make one persona per template, and base every answer on evidence rather than assumption.

1. **Start with real customers.**
   Use conversations, reviews, support messages, sales calls and survey answers.
2. **Describe them as a person.**
   Page 3. Give the persona a first name and a situation you can picture.
3. **Capture goals and pain points.**
   Pages 4 and 5. What they want, and what gets in the way.
4. **Understand how they decide.**
   Pages 6 and 7. What motivates them, and what makes them hesitate.
5. **Plan how to reach and guide them.**
   Pages 8 to 10. Channels, journey and messages.
6. **Summarize on one page.**
   Page 11. Share it with anyone who writes, designs or sells for you.

MY EVIDENCE: WHERE MY ANSWERS COME FROM

- ☐ Customer conversations
- ☐ Reviews and feedback
- ☐ Support or sales messages
- ☐ Survey answers
- ☐ Website or shop statistics
- ☐ Social media comments

PART 1

Customer profile

Describe one person you can picture. Keep it factual and respectful.

PHOTO OR SKETCH

PERSONA FIRST NAME

ROLE, WORK OR SITUATION

WHERE THEY LIVE OR WORK (CITY, REGION OR SETTING)

BUDGET OR SPENDING RANGE FOR WHAT I OFFER

COMFORT WITH TECHNOLOGY

A TYPICAL DAY OR WEEK IN THEIR LIFE

IN THEIR OWN WORDS

A short sentence a real customer said that sums up their situation.

PART 2

Needs and goals

What is this person trying to achieve, and what do they need in order to get there?

THEIR TOP THREE GOALS

1.

2.

3.

PRACTICAL NEEDS (WHAT IT MUST DO)

EMOTIONAL NEEDS (HOW THEY WANT TO FEEL)

THE JOB THEY ARE HIRING MY PRODUCT OR SERVICE TO DO

WHAT SUCCESS LOOKS LIKE FOR THEM

PART 3

Pain points

What frustrates, delays or worries this person today? Describe each in their words.

PAIN POINT	HOW IT SHOWS UP	WHAT THEY DO ABOUT IT NOW	HOW STRONG IS IT? (1 TO 5)

THE PAIN POINT I AM BEST PLACED TO SOLVE

PART 4

Buying motivations

What makes this person start looking, and what makes them choose?

TICK WHAT MATTERS MOST TO THEM

- ☐ Price or value
- ☐ Quality
- ☐ Speed
- ☐ Convenience
- ☐ Trust and reputation
- ☐ Personal service
- ☐ Expert advice
- ☐ Guarantees
- ☐ Values they share with a brand
- ☐ Recommendations from others
- ☐ Design or experience
- ☐ Flexibility
- ☐ _____
- ☐ _____
- ☐ _____

WHAT TRIGGERS THEM TO START LOOKING?

_____

_____

_____

WHAT MAKES THEM CHOOSE ONE OPTION?

_____

_____

_____

WHAT WOULD MAKE THEM RECOMMEND ME TO SOMEONE ELSE?

_____

_____

_____

PART 5

Objections

Objections are the reasons someone hesitates. Answer them honestly and early.

OBJECTION (WHAT THEY SAY)	THE WORRY BEHIND IT	HOW I CAN REASSURE OR ANSWER

THE OBJECTION I HEAR MOST OFTEN, AND THE BEST PROOF I HAVE AGAINST IT

PART 6

Preferred communication channels

Reach people where they already are, in the way they like.

TICK THE CHANNELS THEY USE AND TRUST

- ☐ Email
- ☐ Instagram
- ☐ Facebook
- ☐ LinkedIn
- ☐ YouTube
- ☐ TikTok
- ☐ Search engines
- ☐ Messaging apps
- ☐ Phone calls
- ☐ Events or in person
- ☐ Podcasts
- ☐ Online communities
- ☐ _____
- ☐ _____
- ☐ _____

CONTENT FORMATS THEY PREFER

Short video, long articles, checklists, calls, demos.

TONE THAT WORKS WITH THEM

BEST TIMES OR MOMENTS TO REACH THEM

WHERE THEY ASK FOR ADVICE

PART 7

Customer journey

Describe what happens at each stage, from first hearing about you to buying again.

	AWARE	CONSIDER	DECIDE	BUY	AFTER
What they do					
What they think or feel					
Where they meet me					
Questions they ask					
How I can help					

THE STAGE WHERE I LOSE THE MOST PEOPLE, AND MY BEST GUESS WHY

PART 8

Messaging opportunities

Turn what you learned into words you can use.

A HEADLINE THAT SPEAKS TO THEIR MAIN GOAL

#	KEY MESSAGE	PROOF (RESULT, EXAMPLE, GUARANTEE)

WORDS AND PHRASES TO USE

WORDS AND PHRASES TO AVOID

THE ONE ACTION I WANT THEM TO TAKE

CONTENT IDEAS FOR THAT STAGE

SUMMARY

Persona on a page

Copy your best answers here and share this page with anyone who writes, designs or sells for you.

NAME AND SITUATION

PREFERRED CHANNELS

TOP GOALS

JOURNEY: WHERE I LOSE THEM

MAIN PAIN POINTS

KEY MESSAGE

BUYING MOTIVATIONS

TONE AND WORDS TO USE

TOP OBJECTIONS