

A background image of a target with several arrows hitting the bullseye. The target is circular with concentric rings in shades of blue and purple. The arrows are dark with colorful fletching. The overall image has a blue and green color palette.

HOW TO IDENTIFY AND TARGET YOUR IDEAL CLIENT

A GUIDE TO PERSONAS AND THE BUYER'S JOURNEY

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Buyer Persona Profile

Buyer personas are fictional representations of your ideal client. Using them as part of your marketing strategy allows you to develop highly targeted messaging to the prospects you want to win over as a client. Use the following template to build out your ideal client persona(s).

BACKGROUND	
NAME ASSIGNED TO THIS PERSONA:	
INDUSTRY:	
JOB TITLE:	
EDUCATION:	

DEMOGRAPHICS	
INCOME:	
LOCATION:	
HOUSEHOLD MEMBERS:	
AGE:	

Communication Preferences		
IN PERSON:	YES <input type="checkbox"/>	NO <input type="checkbox"/>
PHONE:	YES <input type="checkbox"/>	NO <input type="checkbox"/>
VIRTUAL MEETING:	YES <input type="checkbox"/>	NO <input type="checkbox"/>
EMAIL:	YES <input type="checkbox"/>	NO <input type="checkbox"/>
NEWSLETTER:	YES <input type="checkbox"/>	NO <input type="checkbox"/>
SOCIAL MEDIA:	YES <input type="checkbox"/>	NO <input type="checkbox"/>

OBJECTIVES	List all objectives below
OBJECTIVE #1	
OBJECTIVE #2	
OBJECTIVE #3	
OBJECTIVE #4	

OPPORTUNITIES	List all opportunities below
OPPORTUNITY #1	
OPPORTUNITY #2	
OPPORTUNITY #3	
OPPORTUNITY #4	

Buyer's Journey

The next step is to map out your buyer's journey. The buyer's journey is the process buyers go through to become aware of, consider, and decide to purchase a new product or service. Use this template to map out the buyer's journey for your persona(s).

PERSONA #1 JOURNEY MAP

STAGE OF JOURNEY:	AWARENESS	CONSIDERATION	DECISION
CHANNEL(S):			
MESSAGING:			
MEASURE OF SUCCESS:			

PERSONA #2 JOURNEY MAP

STAGE OF JOURNEY:	AWARENESS	CONSIDERATION	DECISION
CHANNEL(S):			
MESSAGING:			
MEASURE OF SUCCESS:			

Additional Resources:

- [How to Launch Fee-for-Service in 2023 Resource Center](#)
- [Free Tools to Step Up Your Marketing Game](#)

Save the Date! December 14th

Join the 4th webinar in our series as we walk you through how to configure and maximize your AdvicePay account.