

Persona name



Persona description

Questions to ask

TRIGGER

REVIEW

PURCHASE DECISION

ENGAGEMENT

RELATIONSHIP MANAGEMENT

RENEWAL

What triggers awareness of the supplier/product?

What is used to explore potential suppliers and assess their proposals?

What criteria are evaluated to select the chosen supplier?

How does the onboarding process unfold?

What shapes the customer experience?

What prompts contract renewal?

Vendor's goals

Enter the prospect's mindset a drive a call to action

Meet the prospect's need for information better than that of competitors

Provide evidence on being the best fit

Enable a seamless onboarding process

Ensure the customer has the best experience possible

Stay engaged with customers and drive renewal

Touchpoints

- Direct mail
  - Email advertising
  - Customer referrals
  - Distributor websites and advertising
  - Retailer websites and advertising
  - Organic search results
  - Social media
  - Online advertising
  - Industry trade shows
  - TV advertising
  - Bill boards
  - Sponsorship
  - PR
- Brochures and catalogues
  - Customer reviews
  - Peer referrals
  - Expert revirews
  - Website
  - Whitepapers
  - Webinars
  - Podcasts
  - PR
  - Professional associations
- Case studies
  - Presentations
  - Best practices
  - ROI data
  - Awards
  - Testimonials
- Contract negotiation
  - Invoicing
  - Stakeholder buy-in
  - Account management
  - Training
- Customer service
  - Technical support
  - Ordering
  - Shipping / receiving
  - Market research
  - Mobile apps
  - customer events
  - User communities
  - Email communications
  - Direct mail
  - Webinars
  - Social media
- Loyalty programs
  - Referral programs
  - Performance reviews
  - Contract negotiation
  - Vendor-specific conferences
  - Newsletters
  - Brochures / catalogues
  - White papers
  - Webinars
  - Podcasts
  - Social media