Ideal Client Persona Worksheet

OPTIMISATION & PROMOTION

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SECTION 1

Background & Demographics

Name

Choosing a name and photo will help humanise your imaginary persona and make it easier for you to keep them in mind.

Age

This will help inform the type of language you use to communicate with them.

Highest Level of Education

This will help inform the type of language you use to communicate with them.

Household Income

This will help you appropriately refine your marketing efforts.

What industry do they work in?

This will allow you to understand their communication preferences and experiences they may have had.

SECTION 2

Goals & Values

What do they want to achieve?

In their job and in their life. E.g if they want to be able to spend more time with their family, they might need to make something more efficient at work so they could leave earlier.

What do they value?

This will help shape your messaging and focus on important features and benefits. E.g do they care about environmentally friendly packaging? Or are they more concerned about cost-effectiveness?

SECTION 3

Sources of Information

How do they like to communicate?

Email, phone call, text message, calendar invite, live events?

Which social networks do they use?

- ☐ Facebook
- ☐ Instagram
- ☐ Twitter
- ☐ LinkedIn
- ☐ Pinterest
- ☐ TikTok
- ☐ WeChat
- ☐ Other (please specify)

_____

What publications (magazines, newspapers, newsletters) do they read?

Do they follow any particular celebrities/thought leaders in the field?

SECTION 4
Challenges & Pain Points

What does this person find frustrating?

What is NOT having your solution stopping them from achieving/ experiencing/feeling?

What does this person wish they could do or have?

What are the potential consequences of not having your solution?

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SECTION 5

Barriers

Where does this person sit in the decision-making process?

What information do they need (for themselves or to present to others) to influence a buying decision?

Why might they choose not to go with your solution?

BONUS SECTION

Donor Motivation

Global Issues

What major global issues concern them?

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Local Issues

What local issues concern them?

Which emotions inspire or move them to give?

Pity, compassion, personal experience? This will help you tailor your messaging.

Objections to giving

What are some common objections they have to donating? (Common ones include not knowing where to donate, not trusting charities to be transparent, overwhelm, doesn't want to commit to regular donations).

SECTION 6
Conversion

Desired action and conversion goal

What's the best way to engage this persona with your organisation and what is considered conversion? Signing up for a newsletter, a one-off contribution, volunteering, monthly contributions, sharing on social media?

Include some real quotes and common objections if you have them!

Persona	AWARENESS: What information do they need?	AWARENESS: Content ideas	CONSIDERATION: What information do they need?	CONSIDERATION: Content ideas	DECISION MAKING: What information do they need?	DECISION MAKING: Content ideas
Persona 1						
Persona 2						
Persona 3						