

PERSONA TEMPLATE

BASIC INFORMATION

NAME:

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AGE:

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OCCUPATION:

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LOCATION:

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WHAT HE/SHE CAN'T LIVE WITHOUT

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WHAT HE/SHE IS VISITING & READING

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THE BACKSTORY

Make your persona come to life. What can you share about his/her daily life, habits, cares, etc.?

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WHAT IS HE/SHE THINKING?

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WHAT IS HE/SHE FEELING?

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COMMUNICATION PREFERENCES

How does he/she want to interact with and consume information?

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PERSONA TEMPLATE

BASIC INFORMATION

NAME:

Amanda

AGE:

25

OCCUPATION:

Project Manager at tech startup

LOCATION:

New York, NY

WHAT HE/SHE CAN'T LIVE WITHOUT

Her ClassPass membership and FitBit

Off-Broadway plays

Her Pinterest and Instagram accounts

WHAT HE/SHE IS VISITING & READING

The Skimm

Refinery29

Mashable

THE BACKSTORY

Make your persona come to life. What can you share about his/her daily life, habits, cares, etc.?

Amanda is a young professional who recently started a new job. A jump in salary means extra income,

which will ease her tight monthly budget. While she's maintaining core services with her parents' bank,

she is also searching for other solutions that would better meet her *own* financial needs—and help her

feel like she's taking control of her financial life. That said, Amanda is young and can be a little irresponsible—

she's left her card at restaurants/bars on a couple of nights when she went out with her tight group of friends.

WHAT IS HE/SHE THINKING?

With my recent jump in pay, it makes sense

to start building credit and bank separately.

WHAT IS HE/SHE FEELING?

I'm excited—I'm finally getting some real

independence from my parents. About time!

But I'm also nervous...I don't know much about

personal finance or money management.

COMMUNICATION PREFERENCES

How does he/she want to interact with and consume information?

Highly connected, always on

Actively uses online banking; hasn't been to a bank branch in 2 years

Uses mobile apps, including for banking

Actively uses social media

Prefers email over text and mobile app for notification, though uses the latter

Reads celebrity gossip in hard copy (*US Weekly*)



PERSONA TEMPLATE

TRIGGER SCENARIO

What situation is spurring him/her toward a goal, or to start a journey?

NEEDS & GOALS

What does (s)he need or want to achieve?

PAIN POINTS

What are the challenges to achieving these goals?

ATTITUDE

What is his/her mindset about getting to the goals?

ACTIONABLE TAKEAWAYS & IMPLICATIONS

To answer *after* mapping this customer's journey. What lessons can we apply to our communications planning and execution?

PERSONA TEMPLATE

TRIGGER SCENARIO

What situation is spurring him/her toward a goal, or to start a journey?

Amanda starts a new job and decides to open her own retail checking account.

NEEDS & GOALS

What does (s)he need or want to achieve?

Open a new account with minimal friction

Get tools to help with budgeting

Make money go further

Find a bank that works with her lifestyle (easy access to ATMs, low fees, seamless between mobile/desktop)

PAIN POINTS

What are the challenges to achieving these goals?

Inability to find information fast online

High fees

TMI! Feeling overwhelmed by choices

ATTITUDE

What is his/her mindset about getting to the goals?

Optimistic

Anxious

Determined

ACTIONABLE TAKEAWAYS & IMPLICATIONS

To answer *after* mapping this customer's journey. What lessons can we apply to our communications planning and execution?

CAMPAIGN: Who else is using a job change to evaluate their financial independence? Let's run a LinkedIn paid social campaign targeting any 22-26 year olds who have recently changed jobs.

CAMPAIGN: Tap into Amanda and other FitBit buyers' interest in personal health with a social campaign targeting FitBit followers: "Keep tabs on your financial wellness as closely as your fitness."

FUNCTIONALITY: She's easily frustrated when she cannot find an ATM because she hates paying fees—can we invest in improving the accuracy/reliability of our app's "ATM locator" feature?

FUNCTIONALITY: A big fear is losing her debit card and the exhaustive process to replace it—can we build a "temporarily disable" feature into our app that makes the process easier?

NEW COMMUNICATION: A big priority for Amanda is budgeting help. Let's develop a budget tool and "weekly summary" email that shows how she has allocated/spent money, and what she has left.

COMMUNICATION SCHEDULE: Amanda can get overwhelmed—let's suppress other product recommendations as she is evaluating and onboarding.

PARTNERSHIP OPPORTUNITY: Can we partner with *The Skimm* to launch a referral program, and offer readers a special discount when opening a new retail checking account?



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