

# Client-centric content creation

## Building client personas template



Client personas are useful strategic tools for businesses to better understand their target clients. Using a template for their creation enables a consistent, organised and clear approach, and reduces the chance of overlooking critical details. The use of a template also provides standardisation across your company, ensuring a shared language and understanding when referring to client personas.

Our template is easily scalable and can be adapted as your business grows, enabling you to target new segments. It also serves as a valuable reference point for client persona details, ensuring that this important information is well-documented and readily accessible.

We have produced the following template for you to use to create your company's client personas. You can use it as it is, or adapt it to your company's requirements. We recommend creating two or three client personas as a starting point.

It is useful to revisit client persona templates on an annual basis and update or amend them as necessary to keep in alignment with your business objectives and evolving client expectations.

**Complete this template for each persona you create; there should be one completed template per persona.**

### 1. Client persona

What is their name?

---

---

---

---

---

Insert an image of your persona.



### 2. Demographics

**Think of your client persona and write down their:**

Age:

---

---

Gender:

---

---

Occupation:

---

---

Income level:

---

---

Geographical location:

---

---

### 3. Goals and objectives

---

#### What are their aspirations?

Their primary financial goal:

Their secondary financial goal:

---

What are their short-term objectives?

---

What are their long-term objectives?

### 4. Challenges

---

What are their financial challenges?

What are their common obstacles?

---

What concerns and fears might they have?

---

What are their unmet needs?

### 5. Psychological

---

#### Write down what you consider your client persona's views might be on the following:

Their attitude towards risk:

Their investment preferences:

---

What level of financial knowledge might they have?

---

What are their hobbies and interests?

---

What are their values and beliefs?

### 6. Communication channels

---

#### How would you best correspond with this client persona?

What social media platforms do they use?

What online communities or forums might they use?

---

Would they like email newsletters?

Yes      No

---

What events or conferences do they attend?

---

Write down any other information which might be relevant.

### 7. Content preferences

---

What is their preferred format of content? *For example, written, visual, video.*

What topics might be of particular interest to this persona?

What is their preferred tone or style?

What is their desired frequency of communication?

8. Behavioural insights

This section considers the client persona’s online habits.

How often do they use social media?

How do they find out information?

What sources do they use?

What influencers or thought leaders do they follow?

What is their preferred time of day for communication?

Complete a new template for each additional persona.  
Regularly review and update your personas to stay aligned with evolving client expectations.

Investment risk information

The value of investments, and the income from them, may fall or rise and investors may get back less than they invested.

Important information

This document is directed at professional investors and should not be distributed to or relied upon by retail investors.

The information contained in this document is not to be regarded as an offer to buy or sell or the solicitation of any offer to buy or sell securities in any jurisdiction where such an offer or solicitation is against the law, or to anyone to whom it is unlawful to make such an offer or solicitation, or if the person making the offer or solicitation is not qualified to do so. The information in this document does not constitute legal, tax, or investment advice. You must not, therefore, rely on the content of this document when making any investment decisions.

The information contained in this document is for educational purposes only and is not a recommendation or solicitation to buy or sell investments.

Issued in EEA by Vanguard Group (Ireland) Limited which is regulated in Ireland by the Central Bank of Ireland.

Issued in Switzerland by Vanguard Investments Switzerland GmbH.

Issued by Vanguard Asset Management, Limited which is authorised and regulated in the UK by the Financial Conduct Authority.

© 2024 Vanguard Group (Ireland) Limited. All rights reserved.  
© 2024 Vanguard Investments Switzerland GmbH. All rights reserved.  
© 2024 Vanguard Asset Management, Limited. All rights reserved. 01/24\_1616C