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.