

Persona Template for SMB Service Businesses



Use this template to create detailed personas for key decision-makers within your target accounts. Understanding individual stakeholders helps tailor your communications and services to their specific needs.

Role and Responsibilities

- **Job Title:** [Primary position and level]
- **Reports To:** [Their supervisor's role]
- **Direct Reports:** [Size and type of team they manage]
- **Key Duties:** [Main responsibilities in their role]

Goals and Challenges

- **Primary Goals:** [What they're trying to achieve in their position]
- **Key Challenges:** [Daily obstacles and pain points they face]
- **Success Metrics:** [How their performance is evaluated]

Decision-Making Process

- **Decision Power:** [Level of purchasing authority]
- **Requirements:** [What they need to see before making a decision]
- **Common Objections:** [Typical concerns or hesitations]

Communication and Engagement

- **Preferred Channels:** [How they like to receive information]
- **Content Preferences:** [Types of content that resonate most]
- **Meeting Style:** [How they prefer to engage in discussions]

Value Propositions

- **Personal Pain Points:** [Specific challenges your service helps them solve]
- **Key Benefits:** [How your solution makes their job easier]
- **Success Stories:** [Relevant examples that demonstrate value]

Tips for Using This Template:

- Create separate personas for each key decision-maker in your target accounts
- Base personas on real customer interviews and feedback
- Update regularly as you learn more about your stakeholders
- Share with your team to align messaging and service delivery
- Use alongside your ICPs to create comprehensive customer understanding