

The Ultimate Persona Interview Guide

A how-to guide for
conducting insightful
persona interviews.

Questions What to ask.

Candidates Who to talk to.

Interviews Do 'em right!

Next Steps Now what?

I've helped many organizations build buyer personas, and one truth remains clear—**your personas will only be as helpful as the quality of the research you conduct.**

And although you will complement your research with survey techniques & data analysis, the interview is the foundation for your efforts. Without solid interviews you simply can't generate personas of value.

Don't be intimidated by the interview process. It's critical, but you can do it. This guide breaks down the persona interview into digestible steps that every marketer can utilize.

Let's get started.



Samantha Stone

Founder and Principal Analyst,
Unleash Possible

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Here's what you're in for... it's quite a treat.

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STRUCTURING YOUR INTERVIEW GUIDE

Before scheduling any interviews you'll want to develop an interview guide. While the guide should not be a rigid script, it is an extremely useful tool for fostering a quality conversation.

Using a variety of questions spurs the most insightful discussions that can later be used to find patterns. Each interview should be comprised of five parts:

1. Organizational Context
2. Personality Attributes
3. Propensity to Buy & Purchase Preferences
4. Motivators & Priorities
5. Content Clues

We have included a series of sample questions broken down by section that you can use to build your interview guide. You likely won't have time to use all of these in each interview, but should instead select 1-2 questions from each section that you feel will best match the cadence of your conversation.

They are designed to solicit discussion and identify patterns and should be customized for your business.



Need help customizing your questions?

Reach out to Samantha.Stone@marketngadvisorynetwork.com.

We're happy to help.

PRO TIP: Allow 3-4 minutes per question.



INTERVIEW PART 1:

Organizational Context

I like to start with these questions because it warms up the discussion by putting the participant at ease. It's a great way to build a rapport between you and the interviewee. But don't think of these as throw away questions. Take-aways are going to come not only from the response you receive but also from the tone by which the responses are delivered.

For example the two responses below give the same answer, but the context is totally different.



Question: Who does the grocery shopping in your household?



RESPONSE A:

"I do all of the grocery shopping. I bring a list of recipes so I can browse the store and be inspired for dinner this week. Sometimes I lose track of time."



RESPONSE B:

"(Sighs) I do all of the grocery shopping. I bring a list so I can get in and out of the store as fast as possible."

In both examples the answer was the same, but the tone (and your take-aways) are completely different. Responder A loves the grocery store. He's inspired by walking the aisles and thinks of it as "me time". Responder B hates grocery shopping and thinks of it as a chore.

Can you imagine the different messages and offers you might provide for one vs. the other?

Organizational Context

Question Bank:

1	What was the best team experience you've ever been a part of? Explain why.
2	Put yourself back in the classroom, what grade would you give your current [insert relevant process, category, or role]? (If they didn't answer with an A, ask as follow up what would it take to get them one grade higher.)
3	How is your team structured? What is the title of the person you report to at work?
4	What's the most frustrating part of your day?
5	How long have you been in your current job?
6	How much would you spend without checking with someone else?



On rare occasions an interviewee isn't comfortable answering one of your questions. Give them permission to pass, but remind them this is for market research only, it's totally confidential and that none of their responses will be aligned to them or their organization. Often once you confirm the data won't be used for other purposes they will open up.

PRO TIP: Never build a persona based solely on internal employee interviews. You must speak with the buyers you want to engage directly.



INTERVIEW PART 2:

Propensity to Buy

The persona interview is not the time to evaluate specific features of your offering, however, you can gain important sentiment insight into how your audience prioritizes the category of offerings.

Question Bank:

I'm going to read a series of statements and pause after each one. I'd like you to tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the statement.	Strongly agree, somewhat agree, strongly disagree, somewhat disagree
My [CATEGORY] _____ is easy to use	
_____ is my most critical concern	
Our organization is not willing to invest in _____ that I trust	
The fear of losing _____ keeps me up at night	
Most _____ could meet my needs	
Price is the most important factor in selecting _____	
Ease of use is the most critical component of _____	
I'm likely to change our current _____	
I focus heavily on _____	
I have at least one _____ I couldn't live without.	
I am very effective at _____	
A significant factor of my success is my ability _____	
It is hard to find _____ when I need it	
I feel confident _____ will deliver on my goals	

Propensity to Buy

Question Bank:

What percent of your budget are you allocating to each of the following:

Category	% of this year's budget	How does this relate to last year? (Increase, decrease, no change)	How do you expect to change in the next year? (Increase, decrease, no change)
Category 1			
Category 2			
Category 3			
.....			



Propensity to Buy

Question Bank:

1	When was the last time you purchased (category of offering)? Describe the process to me. What triggered you to make the purchase?
	If you had to choose between two that did the same thing what criteria would you use to chose one over the other?
	How did you decide whom to evaluate?
	Who else was involved in the purchase process?
	If two providers had equivalent services how would you decide which product to select?
2	Who do you consult when spending \$x?
3	What was the best purchase process you ever participated in? Describe why.
4	When a new gadget comes out that you might want to use you are most likely to: <ul style="list-style-type: none">(a) Stand in line for hours to be the first in your network to have one(b) Place a pre-order excited to be among early owners but not willing to wait in line(c) Sit back and wait for version two so all the kinks will be worked out

Only **21%** of companies say employees have a clear and consistent image of the company's target

*Regalix study, 2014

INTERVIEW PART 3:

Personality Attributes

Although we're focused on business-related insights that can be applied to real tactical execution, don't be tempted to skip this section! While it probably doesn't matter if your interviewee is a cat or dog person (unless you own a pet store) it is critical that you understand how they think. These questions will help you build an emotional, not just logical connection with your buyer.

Question Bank:

1	Who is a personal hero of yours?
2	How would your peers describe you?
3	What would your work colleagues be surprised to learn about you?
4	What was the last book you didn't finish? What prevented you from finishing it?
5	If you could have any super power you could imagine, what would it be? Why?
6	If the "voice in your head" giving you advice was a cartoon character who would it be?
7	When deciding to spend \$500 you are most likely to... (pick one) (a) Carefully evaluate all of my options using a spreadsheet to weigh my options (b) Whip out the check book and ask questions later (c) Consult with my network to verify the quality of my options

INTERVIEW PART 4:

Motivators & Priorities

Understanding what is important to your buyer is essential to building an offering that is compelling. When this portion of a persona is well researched it's easy to go through a list of all your benefits & capabilities and select the value messages that are most likely to resonate for a particular audience.

Question Bank:

- 1 What are you most proud of achieving in the last 12 months?
- 2 What's the hardest part of your job?
- 3 What are your top four priorities for this year?
- 4 When you look back in 18 months from now how will you know you've been successful?
- 5 What have you most regretted not doing in the past six months?

INTERVIEW PART 5:

Content Clues

One of the most immediate values a persona can provide is to offer guidance on the type of content that will attract your audience. In this section you'll test a series of ideas. While you may find specific pieces to produce, the purpose of this exercise is to identify topics of interest and to test how your audience responds to different formats such as How to Guides vs. Research.

Question Bank:

I'm going to share a series of headlines. After each one I will pause and I'd like you to rate how compelled you would be to read an article with that headline on a zero to five scale.	0 – not at all interested 3 – neutral rating 5 – would drop what I'm doing right now to read it
How to _____	
Everything you ever wanted to know about but were afraid to ask _____	
10 Reasons to _____	
Cost Effective _____	
GeYng Started with _____	
Eight Ways You're Doing Wrong _____	
Does your _____ pass the quality test? _____	
5 Signs It's Time to _____	
Quantifying the Value of _____	
Six ways to _____	



The above are title prompts which I've found effective and easy to apply to most businesses. The fill in the blanks should be completed with key capabilities of your offering. But don't limit yourself to these specific frameworks. Pull additional ideas from Google Keyword lists, your existing lead nurturing campaigns and ideas generated by your sales and product teams. You'll be surprised when conducting the research how one persona will be drawn to one set of titles, and another to totally different selections.



PRO TIP: This part of the interview should be highly dynamic. If you're not finding content that enhances (fours and fives) throw in a new title based on your discussion. You may even want to pause and ask what they searched for last week but couldn't find.

Content Clues

Question Bank:

1	What was the last book you read for pleasure? What was the last professional book you read?
2	What publications/magazines do you read regularly?
3	For what keywords do you have saved searches?
4	What was the last professional event you attended?
5	Do you belong to any professional associations? Which?
6	If I were to look at your Google search history what would be the headlines of the last three articles you read related to (insert category)?



According to Forrester, 75% of B2B Buyers believe that vendors are generating too much material for them to sort through. Relevance Is KEY!



RECRUITING CANDIDATES

At this point all your hard work is about to pay off. You're probably chomping at the bit to get started but wondering how to recruit the right candidates.

Unfortunately there is no magic switch that aligns resources but there are some tried and true techniques. You'll be surprised how many people agree to participate when you take the time to ask.

Who Do I Interview?

There are no hard and fast rules about how many people you should speak with but I've found 3-5 people who are alike representing one segment of your buyer community to be a good guide. You will likely have multiple buyer segments that make up your full community.

Be sure to select interview candidates who represent various demographic segments for which you want to target communications.

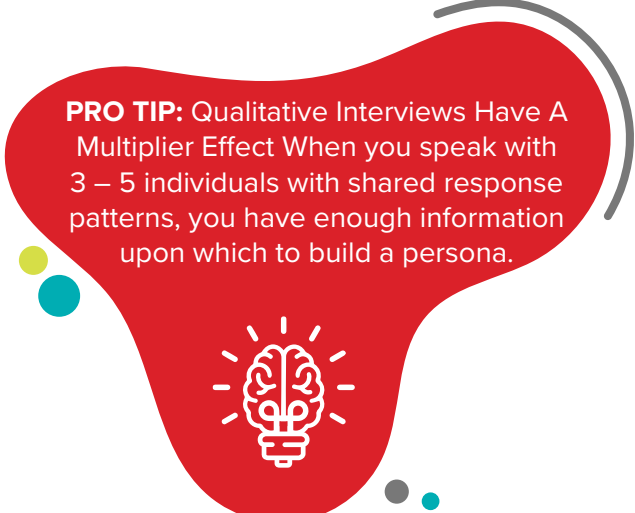
After these interviews you'll start to see patterns and can determine if you need to expand your audience in specific segments further.

You'll know when to stop when you stop learning new things from your conversations and they start to become a chore vs. a detective adventure.

Tips:

- Speak with both customers and non-customers
- For complex offerings, target buyers across various parts of the buying process (e.g. influencer, economic buyer and user)
- Focus on market segments that are most important to your initiative

PRO TIP: Qualitative Interviews Have A Multiplier Effect When you speak with 3 – 5 individuals with shared response patterns, you have enough information upon which to build a persona.



To Incent or Not to Incent?

Participant Profile	Incentive Value
Consumer/User	\$25
Manager	\$50 -\$100
Executive	\$200 -\$300



The decision to provide financial incentives for interview participation is based on the size and willingness of your audience to participate in the interview process. Although not always necessary I use a financial incentive in about 75% of the interviews I conduct.

Who Do I Interview?

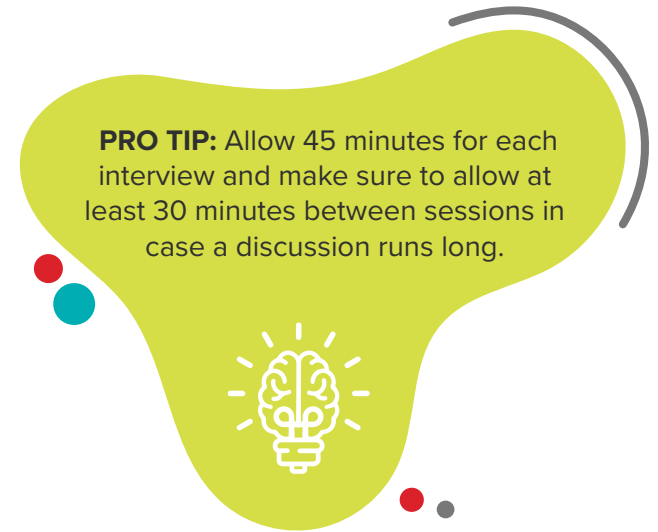
I recommend putting together a list of 25-35 interview candidates to jump-start your recruitment. Who you select depends upon what you are trying to learn. Below are common attributes and when to take them into consideration.

Attribute	Consideration
Geography	Cultural differences are impacted by geographic location and should be taken into consideration when conducting research for a global initiative. Be sure to conduct interviews in the native language of the interview participant. Sometimes, that is not practical, in which case conduct interviews in your native language where feasible and use quantitative survey techniques to validate your learning in other regions. If you are focused on a single region, North American for example, it's helpful to have participants from different geographic locations, but it's not your most important criteria.
Industry	The industry in which your participants work is often relevant for B2B organizations. Sometimes you are investigating an offering for a specific industry – make sure to recruit your interviewees from within that industry. In other instances you offer a product or service that you are directing to a wide range of industries. In this case pick respondents from a number of different industries to test for consistency. I find focusing on your top 5 industries to be most relevant. Your interview results will determine whether you have industry specific personas or different personas by industry.
Size of Organization	Do you sell an offering that supports groups of people working together? Whether the local soccer team, employees at a business or family dynamic the size of the team you are targeting can impact decision making practices and propensity to buy. If you have a specific focus i.e. Enterprise customers above 1000 employees it's easy to pull recruits from that segment. If you sell small business accounting services focus on small businesses. If you sell to a wide range of sized organizations be sure your interview pool represents your customer/target customer base.
Job Function	Role plays a very important part of the purchasing process for both consumer and business buying processes. Be sure to select representatives from across the buying process – economic decision maker, influencer and user.
Current Customers / Non Customers	In all cases you want to speak with both customers and non-customers in your target market. In the case where you are launching a new solution and don't yet have customers target two types of non-customers (1) those who you believe are likely early adopters based on previous category usage (2) those who are your long-term buyer target.
Other Attributes	Every business is unique. For example, do you sell wedding planning services? Then be sure you screen interview participants who are engaged and planning a wedding.

Sample Communications

Now that you know who to target, and what you want to ask, it's time to start scheduling interviews. Your database and LinkedIn In-Mail are both good recruiting tools. In addition, I find services such as <https://www.respondent.io/> and Survey Monkey panel very helpful services for recruiting, screening and scheduling interviews/ If you have a particularly challenging audience to recruit, or simply don't have time to schedule the interviews yourself, there are reputable services that can help. Make sure you don't just pick any calling service, choose one that has a track record for research recruitment.

When reaching out to solicit interviews I almost always start with an email or InMail introduction then follow up via phone to those who respond.



SAMPLE INTRO KNOWN CONTACT:

Dear <first name>,

I'm recruiting participants for a research study and you would be perfect. This study is designed to understand your (insert offering category) _____ needs and priorities.

I promise it will be painless and no advanced preparation is required.

Do you have 45 minutes in the next two weeks you can spare? I promise not to waste your time and the insights you provide will be used to improve our offerings.

SAMPLE INTRO UNKNOWN CONTACT:

Dear <first name>,

We haven't had the pleasure of meeting yet but I hope to change that. I'm conducting (insert offering category) _____ research and would very much appreciate your insights.

I promise to make it painless. Would you be able to spare 45 minutes for a phone interview next week?

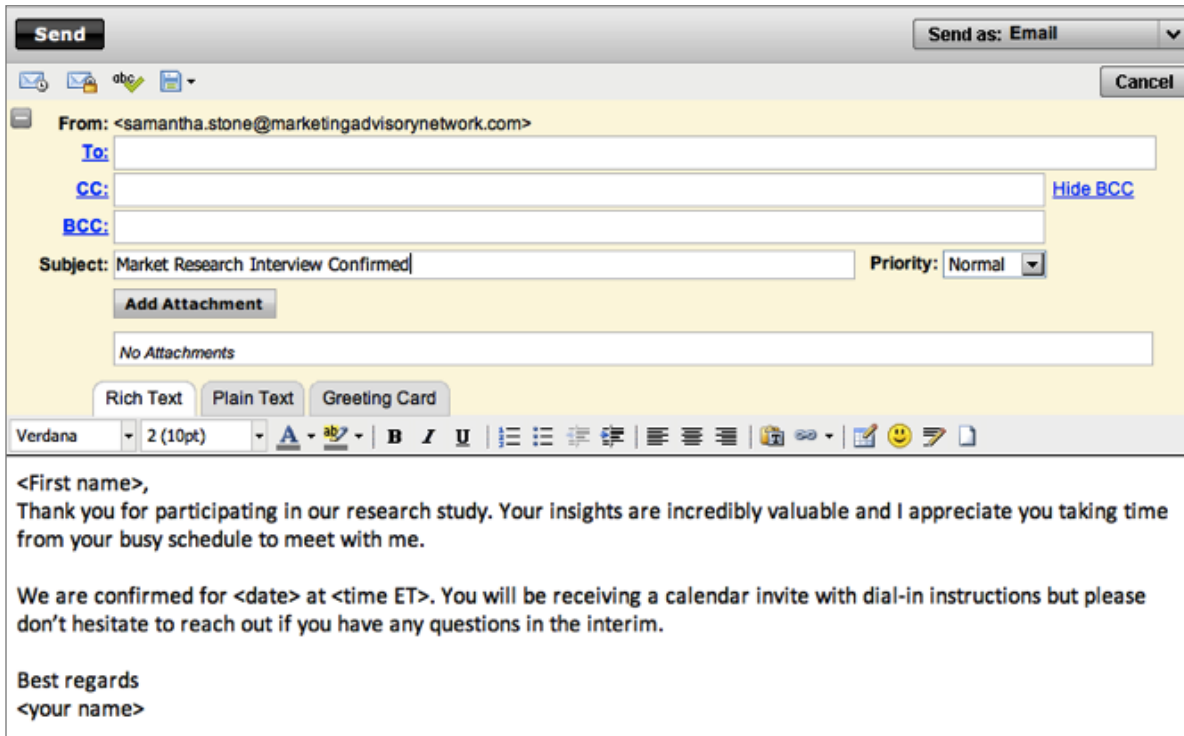
Note: When an incentive is being offered I generally don't include it in my initial LinkedIn or email outreach unless I'm having a difficult time securing candidates.

Sample Communications

Once a meeting has been confirmed, communication is still essential. With good confirmation tactics you can ensure that 90%+ of those who schedule an interview follow through with the scheduled time.

Confirmation email:

Always send your interview participants an email confirming appointment details.



The screenshot shows an email client interface for composing a new email. At the top, there is a 'Send' button and a dropdown menu set to 'Send as: Email'. Below this is a toolbar with icons for email, calendar, and other functions. The main area contains the following fields:

- From:** <samantha.stone@marketingadvisorynetwork.com>
- To:** [Empty text box]
- CC:** [Empty text box] with a 'Hide BCC' link to the right.
- BCC:** [Empty text box]
- Subject:** Market Research Interview Confirmed
- Priority:** Normal
- Attachments:** An 'Add Attachment' button and a text box containing 'No Attachments'.

Below the fields is a rich text editor with tabs for 'Rich Text', 'Plain Text', and 'Greeting Card'. The font is set to Verdana, size 2 (10pt). The editor contains the following text:

<First name>,
Thank you for participating in our research study. Your insights are incredibly valuable and I appreciate you taking time from your busy schedule to meet with me.

We are confirmed for <date> at <time ET>. You will be receiving a calendar invite with dial-in instructions but please don't hesitate to reach out if you have any questions in the interim.

Best regards
<your name>

Sample Communications

Calendar Invite:

In addition to your confirmation email be sure to send your interview participant a calendar invite for the requested meeting time. I always include the day & time in the meeting invite location to ensure no time zone challenges arise. Be sure to also monitor the appointment to make sure it has been accepted by the interviewee.

Market Research Interview

8/20/2015 9:30am to 10:30am 8/20/2015 [Time zone](#)

All day Repeat...

Event details [Find a time](#)

Where Monday April 6th at 9:30am ET Go to Meeting Details Provided

Video call [Add video call](#)

Calendar

Description Thank you for participating in our market research study. If you have any trouble dialing into the provided conference line don't hesitate to call me at 781-xxx-xxxx.

PRO TIP: It may feel redundant to include both a confirmation email and calendar invite but I've found by combining both I can avoid making confirmation





CONDUCTING THE INTERVIEW

Finally the time has come and you get to start interviewing!

Take a deep breath, get your glass of water ready and shut down everything except for your notebook and conference calling line to avoid distractions. Persona interviews deserve your undivided attention.

Plan in advance how you are going to document the information collected. I like to type my notes and have a notebook handy for written scribbles. You can also record the session and have it transcribed later. If you chose to record the session be sure to seek permission from your guest but set them at ease by explaining the recording is to make sure you don't miss any of their feedback.



First and foremost remember this is NOT a survey. This is a conversation. Don't be a slave to your interview guide. Don't be afraid to skip a question, or dig deeper to understand something further. You can even add a new question if the one you asked isn't getting to the heart of what you want to address.



Make your interview candidate feel comfortable right from the start. Welcome them by name and thank them for joining you. Remind them this is purely for market research and all of their responses will be kept confidential (and away from sales!). Be sure to ask if they have any questions before you get started.



Although it is tempting to solicit offering specific win/loss or product feedback, the persona interview is not the time. If you can't help yourself – reserve those questions for the end as not to bias your interviewee's responses.



Silence can be your friend. Don't try to fill every pause in the conversation. The quiet will encourage your interview candidate to dive deeper into their thoughts.



Sometimes the best insights start as a passing comment. When you hear something you'd like to learn more about simply ask for more details. "Could you tell me more about XYZ" leaves room for the interviewee to dig deeper.



Use the interviewee's first name throughout the interview. It shows you are listening and that you value their opinion.

TAKE-AWAYS AND INSIGHTS

Taking hours of interviews and turning it into digestible insights is not easy but it is extremely rewarding. Keep these tips in mind so you don't pull out your hair in the process.

- **Read & re-read all of the interview notes** before doing anything else! Trust me it's worth the time. You'll start to mentally group individuals into logical personas.
- **Next, layout the data into grids** so you can see everything in one place and validate your initial gut reactions. Group personas by common motivators and priorities.
- **Don't keep all this great research to yourself.** Share it with people across the organization.

PRO TIP: Adelle Revella's book *Buyer Personas* documents a useful model for aligning your raw research content.



Thanks for reading! Next steps:

Feeling overwhelmed by the data? Don't worry, help is waiting. Contact Samantha Stone to qualify for a free 30 minute coaching session.

Samantha.Stone@marketingadvisorynetwork.com.