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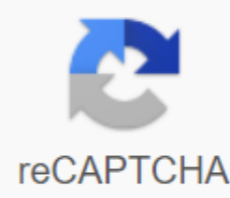
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Persona 4 requests

A payment request, also known as a payment request, is a non-standard request for approval by a department for the approval of payment by the company for goods or services. It is often used for purchases when an invoice is not provided. Organizations often allocate budgets to departments for the purchase of supplies, goods and services. Payment requests are used to obtain approval of a payment to a non-standard purchase or, in some cases, to repay a payment. Organizations that have payment application processes use paper or electronic forms. Applications include key dates, purchase details and item, as well as payment amounts, as well as any supporting documentation. Payment request policies generally have limitations on the types of purchases that can be made through applications. For example, Temple University's policy includes the statement: A claim cannot be used for the purchase of capital assets, travel, goods or most services over $2,000. These items would likely be included in other budgets or procurement processes. A client character is a fictionalized representation of a specific type of customer that you are trying to reach and is used by companies to guide marketing decisions and sales activities. Creating a client character involves finding and defining your ideal customer types, and then developing a fictional character based on your target marketing audience. One of the most important aspects of creating a client character is to have the right information so that you can make informed decisions. Pipedrive allows you to track leads, customers and offers, and also generates information that you can use to define your customer personalities. The price starts at $12.50 per user, per month. Sign up for your free trial today. Visit Pipedrive What is a customer character? Customer personalities are an ideal or target representation of your client. More than just a profile, a client character brings this ideal client to life through a narrative description of their background, demographics, pain points and ways to address these pain points. It is used to guide your lead generation and marketing efforts and help you make decisions about qualification and engagement with prospects. Free customer persona model If all this sounds overwhelming, don't worry. We've created a template that you can use to assemble your personalities Use this downloadable PDF as a guide to help you think about the information you need to create characters that will help you stay focused on your marketing efforts, but don't be afraid to add information that affects your ideal customer. How to create a client character Creating a client character doesn't have to be complicated, but you certainly have to work to understand who your ideal client is and what their unique needs are. We will walk through the steps of creating personas using our client character client as a guide. Here are six steps to creating a customer character: 1. Look for your ideal customer departure by looking for your best customers. It doesn't just mean the customers who generated the most revenue, but it's definitely an aspect. Most importantly, dive into the specific types of customers that are right for your business. For example, if you are a B2B, think more specifically about who in your accounts receivable tends to be the best decision maker for your products and services. Two of the main ways to start searching for your ideal customer are: Search customer data A good place to start searching for your ideal customer is with your existing customer data. If you use a customer relationship management (CRM) tool, you can generate reports that help you better identify common traits in well-functioning customers. Specifically, this will give you information about the customer's purchase trip. You can find information about the types of roles that are common to your client, their specific needs, and how you have addressed them previously. Pro Tip: MRCs like Pipedrive are a great place to find more information about the types of customers you are currently selling to. Pipedrive allows you to track transactions as they progress through your sales process, generate customer and offer reports, and track your sales process. Pipedrive plans start at $12.50 per user per month. Visit their website for more information. Visit Pipedrive Talk at your sales team No one has more insight into your customers than people who interact with them on a daily basis, and you should definitely include their expertise in your research. Ask them about the customers they've found to be a good fit, and more importantly, why. Talk to them about the individual perspectives that later became customers, and ask them to describe the shopping trip, including the needs and pain points they expressed. Here are a few questions to get started: What do your best customers have in common? What are the biggest challenges they face? What is their title or role? What are their values or what is important to them? How did they become a prospect or a customer? 2. Identify Customer Segments With the searches you've done, you can begin to identify different customer segments, or groups of similar characteristics. As you do, you can start grouping your customers into segments based on things like role, needs, and the products and services they buy. The goal here is to identify common client groups that you can then represent with a client character. As a best practice, don't limit your efforts to your best customers. It's actually beneficial to try to find as many types of like-clients as you can, and later you can go back and and which are the best representation of your ideal customer. In addition, it will help you identify the negative characters you want to avoid or disqualify during your marketing process. 3. Talk to real people Looking for your customer data and talking with your front-line team are good places to start, but to really understand your customers and create effective characters, you'll need to have conversations with real people. Ideally,

you should identify a handful of customers who have demonstrated that they fit your business, and reach out to communicate and learn more about who they are and what matters most. While focus groups are often an effective marketing tool for developing client personalities, I recommend more informal one-on-one conversations. When I was a field account executive, my team often scheduled informal appointments with some of our best customers on a cup of coffee as an opportunity to register and strengthen the relationship. We often learn a lot more about our customers in these contexts than in any other part of the sales process. Since you've already started your research and grouped your customers into different segments (at least in your mind), these conversations should focus on testing what you've found so far. I recommend having a list of open-ended questions that you can ask, but it shouldn't feel like an interview. You could say to a long-time customer, 'was curious, I know there are a lot of options on the market. So that I can better help other companies like yours, can you tell me a little bit how our solution has worked so well for you? You will find information about what they like, what they don't like, and how you are able to respond to their pain points. As a bonus, you'll probably encounter areas where you can improve your process to move forward. 4. Complete a Persona profile Imagine you're writing a fiction book about one of your most valuable clients. How would you develop this character? Think about the qualities and characteristics they would present. Think about their needs, desires, goals and challenges. All of these considerations are the same as you should give to your fictional client character. Our free downloadable model can be used to complete this step. Specifically, think about the following aspects of your client personality: Background Your character is more than a title or role. There are a number of variables that contribute to who they are, and the better you can define these the best your character will represent your ideal client. For example, if you create a character for Dave the Purchasing Manager, consider what education and work experience has led to, and ask yourself what motivated Dave to pursue this particular area of work. Demography These are more generalized characteristics where they live, age, gender, income bracket and employment (if they are a consumer). The goal is to examine their overall living situation, as this has a significant impact on their pain points and specific challenges. If you sell to customers in various fields, you will find that customers will have different needs depending on their location, income range, occupation, and even race or gender. Personality and preferences It may seem strange to talk about your client's personality and preferences, but that's what makes a personal a person. In fact, this is an essential aspect of using a character to inform your sales and marketing efforts because it tells you how you will best be able to connect. If you've already started sending a client email and told you, Well, Joe doesn't really read emails, so I should probably give him a call, you understand that personality and preferences play a huge role in the customer relationship process. Establishing these people in your client personality will help you make better decisions about how to communicate with prospects in the future. Goals Whether your client is an individual consumer or another company, he or she has specific goals. Some of them may relate to your products or services, but ideally you will paint a more general picture of their goals. This will help you relate to what is most important to them, what is important to connect with any prospect or customer. For example, if you are a financial services consultant, you could create a character for Hank the Owner, who wants to pay for his home, save enough for retirement, and have enough discretionary income to travel with his grandchildren in the next four to seven years. These goals are directly related to your services, but even if you sell new roofs, knowing what Hank's goals are related to creating value for his family will make a huge difference in how you approach him. Pain Points Whether your client is a business or a consumer, he has specific challenges and problems that you are likely interested in solving. Identifying pain points for each of your characters helps you better understand why they might be involved in your marketing campaign. This helps you make decisions about the message most likely to connect with your prospects and help them go further in the sales process. If you identify a character whose greatest point of pain is to find a better way to help their children eat your marketing to this character could highlight the organic aspect of your product. On the other hand, if their biggest pain point is that they are trying to feed a family on a budget, your marketing message will probably focus more on the value and affordable nutrition provided by your product. How you can help The ultimate goal of a client character is to identify and write down the ways in which your business can address their specific pain points. Having this as an explicit part of your client character provides you with a solid reminder that you can use as you plan your sales approach. Different characters will have different needs, and will therefore benefit from different products or services, and it is important to identify and understand each of them. Don't underestimate how powerful this is for your sales team. While they should always engage in a dialogue about needs to better understand the client in front of them, a client character provides a valuable starting point for research and approach to new perspectives, as it provides a framework for identifying their likely pain points and possible solutions. 5. Give your character a name and a story This is where you turn your profile into a story of a fictionalized person who represents your real clients. Using the profile you've created, your job is to create a story that brings your character to life. This is an important step because it's what solidifies each character in your mind and makes them more relatable. When you talk about your characters while your team creates marketing campaigns, you want to think about them as if you knew them. For example, when my team was working on a new marketing initiative, it was not uncommon to hear someone at the table say something like, I don't think Susie the solo entrepreneur is really going to resonate with that message. Eventually, it just became Look, Susie's not going to worry about that; what we really need to do is address his true point of pain. Susie had become part of the conversation because she was real. She was our client. Ideally, your customer personalities will become a natural part of the conversation in your business, and help you make better decisions on how to most effectively attract the right types of customers. Giving your character a name and a story takes them from an abstract idea and turns them into something tangible that you can act on. 6. Match your strategy to your personas Translating these stories into specific marketing activities is the final step in the process, but don't overlook how important it is to take a look at what you are currently doing to attract customers through the prism of your newly created characters. It's a waste of time to go through the effort of finding your customers and creating romanticized personas, and then not actually implementing them in your marketing planning. Some of the specific areas that your characters Inform your strategy include: Where to focus marketing efforts: Once you know who your character is, you can make decisions on which channels are most likely to reach them effectively, be it social media, digital ads, direct mail, or traditional advertising. What to say: Your customer personalities should help you decide which messages are most likely to resonate with your ideal customers. Adapting your marketing message to specific characters increases the likelihood that they will respond and become customers. Sales process: The customer's overall journey should be clearer now that you better understand their needs, values and background, and you now need to adjust your sales efforts and your overall process to match them. How to measure: Because you have a better alignment between your customer personas and your marketing and sales efforts, you can match how you measure performance to whether you are actually reaching those customers. Examples Personas Customer To get you started, we include some examples of customer personalities that represent what a finished product might look like. If you use the model provided, that would be what you would use for the Customer History section. Here are some examples of personas for a digital marketing agency: Susie the owner of the small business Susie started her own business because she wanted to do something she loves. She has always been entrepreneurial, and she has worked hard to turn her passion into her own business. She works hard to balance her business and her family because she wants to build something that will last and make a difference in the life she provides them. As her business grew, she added a handful of employees and her role shifted from most of the work itself to managing and developing a team. She had to learn these skills by testing by fire, but loves that her business is providing a place for others to share her passion. Its biggest challenge is to put in place systems and processes that will grow as the business grows. She may not be a tech-savvy, but she learns quickly and is not afraid of change. We can help Susie by taking her marketing efforts from her very complete plate and handling her website, social media, and email marketing. We can serve her marketing department and develop strategies with her on the best ways to reach the right customers. We will also ensure that she feels in control with regular registration meetings to provide analysis and reporting on how our combined efforts work. Michelle the Marketing Director Michelle is a marketing manager at a large regional credit union. She climbed 100 years after a summer internship five years ago and now leads a team of five marketing. Michelle studied graphic design at university, but soon discovered that she enjoys the process of creating marketing strategy and campaigns. She also discovered that she was good at it. Michelle is ambitious and dedicated to her work and business. She sees herself rising, although she appreciates both her current work and her team. Michelle is married and she and her husband work hard, but love to travel and spend time with Goldendoodle puppy. Her biggest job challenge is that she often feels like her team is supposed to do more with limited resources, and several current team members wear too many hats. We can help Michelle by partnering and filling gaps in areas like digital design and social media. We can also manage larger projects when they arrive, allowing them to outsource work that they are not able to produce internally, especially media production. Our experience working with other clients like it gives us the opportunity to help her make the kind of strategic decisions that will generate qualified leads and make her team beautiful. Types of customer personas It is important to recognize that there are differences between the types of personas you would create for a B2B business-to-business sales organization compared to a business that sells primarily to consumers. While both types of characters are essentially a fictionalized individual representation of your target client, one represents both the needs of themselves and their organization, while the other may focus on their family or other personal motivations. Here are three types of customer personas to keep in mind: B2B Customer Personas A customer character from a company you're selling to can represent a purchasing manager, end user or C-level executive. More than just a role, a character represents the challenges they face in their business, and how you can help meet their specific needs. When creating a character, it's important to understand the unique challenges and responsibilities that everyone faces, and how it affects their buying path. Consumer Customer Personas This is a customer character for a person who makes a purchase for themselves or for their family. They do not make the purchase on behalf of an organization by which they are employed, but rather for personal use. Different types of personas that fall into this category may include a pet owner, relative or pet owner. If your business primarily sells to consumers, they help compose the ideal types of customers you want to reach and create a narrative to help focus your efforts. Negative Characters In addition to clarifying the characters you are trying to reach, it can be just as valuable to articulate the types of personas you want to avoid. There may be a variety of reasons, but you can mostly identify the types of customers that don't work as well in the long run. For example, you can that a specific type of prospect has a low lifetime customer value (CLV), which means you might choose not to invest your marketing and sales resources on them. There may be a variety of reasons, but generally it is because you notice over time that certain types of leads do not end up being a good fit with your product or services, and you are unable to effectively offer them a solution that matches theirs Or sometimes it may mean that you have found that customers who have certain types of needs or challenges will be too expensive to serve to be profitable to pursue. Why personas are useful to business If I asked you what are the typical needs of a 64 to 80 year old woman living in a Midwestern town, you might have no idea. If I asked you to think about your grandmother, it would be completely different. Customer personalities are useful because they bring a segment of our target market to life, and help us stay focused on the marketing efforts that will attract and convert them best. Understanding your customers through personas helps create a vivid picture of who you are trying to achieve with your marketing or sales efforts. They help filter out noise and focus your efforts where you already know they will be most effective. For example, if you are a small photography studio that caters to family portraits, your character could be a mother with children, and your marketing efforts would focus on how to reach her and meet her needs. Here are some of the benefits of using customer personalities: Keep everyone on the same page: Once you've defined a client character, everyone knows who you're talking about when you refer to Melissa the Marketing Director or Steve the School Teacher. They focus your marketing efforts: small businesses have limited resources and need to choose wisely how they use them to market their products. Client personalities help make decisions about which efforts are likely to be most effective in reaching their target. Frequently asked questions (FAQs) What is the difference between a character and a profile? A profile is a collection of information, and a character is a fictionalized representation of a real person. One way to think about it is that the profile is a list of information about someone, where the character is the story of who they are and what matters to them. How many personalities do I need to have? Very few companies have one, and you should create a character for each of the ideal types of customers you sell to. Consider organizing personas by product or service type so that you match your marketing efforts with the customers you sell to each. Bottom Line Personas customer are a valuable tool, and the process of creating them will help your business clarify the types of customers you want to pursue with your marketing efforts. They provide your entire team with a point of contact to use in the campaigns and evaluation of the effectiveness of your marketing and sales process. One way to measure whether your client personalities are effectively guiding your decisions is to evaluate your sales pipeline. Pipedrive is a CRM that allows you to organize and move transactions through a highly visual pipeline tool and gives you the ability to track your performance. Performance. plans start at $12.50 per user, per month. Visit Pipedrive to start today. Visit Pipedrive Pipedrive

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