THE CUMBERBATCH GROUP

Customer Persona Worksheet

An evidence-based framework for understanding priority customers, their goals, decisions, behaviors, barriers, and expectations

Business or project	
Persona lead	
Date prepared	
Market or geography	
Version	

How to use this worksheet

Build each persona from interviews, observation, sales records, customer-service patterns, research, and other credible evidence. Avoid inventing decorative details that do not affect the decision. Focus on the customer's situation, desired progress, constraints, behavior, buying process, and the implications for the offer and customer experience.

01 PERSONA SCOPE AND EVIDENCE

Define the decision this persona must support, the customer group being studied, and the strength of the available evidence.

Scope element	Definition
Business decision	
Product or service	
Market or geography	
Customer type	
Persona boundary	
Time period	

Evidence source	Sample or volume	Date	Confidence	Important limitation
Customer interviews				
Sales or CRM data				
Market research				
Observation or support data				

Important evidence still missing

02 PRIORITY SEGMENT

Describe the customer group in business-relevant terms and distinguish it from adjacent segments.

Segment factor	Primary persona	Adjacent segment
Customer type		
Industry or category		
Life or business stage		
Location or reach		
Budget or economic context		
Current solution		
Urgency		
Distinctive characteristic		

Why this segment should be prioritized

Who should not be included in this persona

03 ROLE AND OPERATING CONTEXT

Understand the customer's responsibilities, environment, pressures, resources, and the people affected by the decision.

Context factor	Persona details	Implication
Role or responsibility		
Typical day or workflow		
Performance expectations		
Available resources		
Time constraints		
Internal pressures		
External pressures		
People affected		

Context the business is most likely to misunderstand

Change in circumstances that creates urgency

04 GOALS AND DESIRED PROGRESS

Clarify what the customer is trying to accomplish and how success is evaluated in practical and personal terms.

Goal level	Desired progress	Evidence	Measure of success
Immediate task			
Functional outcome			
Economic outcome			
Emotional outcome			
Social outcome			
Longer-term ambition			

Most important outcome

Trade-off the customer is willing to make

Outcome the customer values but may not state directly

05 PROBLEMS, FRUSTRATIONS, AND RISKS

Identify the obstacles, costs, uncertainties, and consequences that make progress difficult.

Problem or barrier	Frequency	Impact	Current response	Evidence

Cost of leaving the problem unresolved

Risk the customer is most determined to avoid

Reason the customer may tolerate the current situation

06 BEHAVIORS AND CURRENT WORKFLOW

Document what the customer actually does before, during, and after confronting the problem.

Stage	Current behavior	Tool or channel	Friction	Workaround
Recognize the need				
Seek information				
Evaluate options				
Make the decision				
Begin using				
Assess results				

Behavior that matters more than stated preference

Habit or workflow the solution must fit

07 BUYING DECISION

Map the trigger, participants, criteria, objections, budget, timing, and authority involved in the purchase.

Decision factor	Persona details	Evidence
Purchase trigger		
Decision maker		
Influencers		
User		
Budget source		
Decision criteria		
Approval process		
Timing		
Primary objection		

Factor most likely to win the decision

Factor most likely to delay or prevent purchase

08 INFORMATION AND TRUST

Determine where the customer learns, whose judgment matters, and what evidence is required before confidence develops.

Information or trust factor	Persona behavior	Implication for the business
Preferred search channel		
Trusted people or institutions		
Content or format preferred		
Questions asked first		
Proof required		
Trust signal		
Credibility concern		
Privacy or security concern		

Evidence the business should provide earlier

Claim the customer is least likely to believe without proof

09 ALTERNATIVES AND SWITCHING

Understand how the customer currently solves the problem and what must be overcome to change behavior.

Alternative	Why it is chosen	What works	What fails	Switching barrier
Direct competitor				
Indirect solution				
Internal workaround				
Do nothing or delay				

Current alternative most difficult to displace

Reason the customer would switch

Risk the customer perceives in switching

10 CUSTOMER JOURNEY IMPLICATIONS

Translate persona insight into specific improvements across discovery, evaluation, purchase, delivery, and retention.

Journey stage	Customer need	Likely concern	Business response	Measure
Awareness				
Consideration				
Decision				
Onboarding				
Delivery or use				
Support				
Retention or referral				

Moment that matters most to this persona

Journey improvement that should be prioritized

11 MESSAGING IMPLICATIONS

Convert persona evidence into relevant messages, proof, language, and calls to action without stereotyping the customer.

Message element	Recommended direction	Evidence
Problem to acknowledge		
Outcome to emphasize		
Benefit to lead with		
Objection to address		
Proof to provide		
Language to use		
Language to avoid		
Primary call to action		

One-sentence message for this persona

Message that would feel generic or unconvincing

12 PERSONA SUMMARY AND ACTION PLAN

Consolidate the evidence into a usable persona and identify the business changes the insight requires.

Persona element	Approved summary
Persona name or segment label	
Defining situation	
Primary goal	
Central problem	
Decision trigger	
Decision criteria	
Primary barrier	
Trusted proof	
Relevant message	

Required business action	Owner	Due date	Evidence of completion

Next evidence-gathering activity and review date