

CONVERSATION CANVAS™

PERSONA:
 CREATED BY:
 DATE:
 VERSION:

Written from the your ideal customer's POV, create a canvas for each persona you're targeting.	BUYER'S JOURNEY				
	ATTRACT Committed to Change	CONVERT Committed to Finding Solution	CLOSE Committed to Making a Selection	EXPAND Committed to Buying More	RETAIN Committed to Renewing
TRIGGER & MINDSET					
ACTIONS					
KEY MESSAGE					
CONTENT					
CHANNELS					
METRICS					

PART 1: UNDERSTANDING YOUR IDEAL CLIENT

Focus on the trigger, mindset and how buyers buy. If you have more than one target audience, you should complete this exercise for each target.

Information can be found through interviews and market research.

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<p>What prompted the potential customer to question their current practice? How do they currently perceive your company and product?</p>	TRIGGER & MINDSET	What happened that was the final breaking point to motivate them to take action? What are they currently using? What perceptions do they have about your product? Your company? What are the problems they face? (pain points) 1. 2. 3. 4.	What are my competitors using? How will it work with other tools we use? What do we expect to gain from this new solution? 1. 2. 3. 4.	Are companies who use this product satisfied? How well does the product meet my needs? My managers? My executives? How do each of the vendors compare against my requirements? Who is offering the best overall deal? Will this vendor be able to grow with us as we get bigger and become more sophisticated?	How does this product help me be better at my job? How do we measure ROI? Are we seeing it? How well does the product solve our original issues? Did the vendor hit all the key milestones and did we meet our success criteria? How do our results compare with others?	What other problems or unconsidered needs do I have? Could other teams benefit from this? Now that I trust this vendor, can I get even more value from other products/services they offer? What additional benefits could I realize if I bought more?
<p>What kinds of questions is the potential customer asking they search for a solution? What tasks do they need to complete to move forward?</p>	ACTIONS	How can I find out if others in my industry are experiencing these same issues? How are they finding success? Who needs to be involved in this project? Who ultimately will make the final decision?	Gather requirements from key team members. Evaluate specific products based on our requirements. Engage with sellers of various potential solutions. Define the cost-benefit of different solutions.	Get buy-in from stakeholders and commit to a specific solution after evaluating multiple vendors. Define the budget, timelines and key dependencies. Clearly define what success looks like in measurable terms. Have a plan to implement and rollout to users and get them trained so they see value quickly.	We've been tracking product usage and performance. We've also tracked how well we've performed against our success metrics. Users see value and enjoy using the product -- some may even be advocates. The vendor we've chosen has shown they care about our business and have been proactive in helping us get value from their product.	We trust the vendor we've chosen. We're expanding access to the product to more people across the company. If this vendor has new products or services we're interested in learning more about them and potentially buying more.

PART 2: CREATING COMMUNICATIONS

Use the information from Part 1 to identify the best messaging, content and offer for each stage of the relationship.

Be clear about what is unique about your product and explicit about how it addresses their issues and the business value they will realize.

Insights can be gained through internal, customer and prospect interviews, in addition to "lost customer" interviews. Review data you've collected on product engagement, customer feedback, and what your competitors are doing.

This process is iterative and requires lots of testing to reach desirable results.

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<p>Understanding the buyer and how they make purchase decisions is the foundation of all marketing activities. What does the buyer need to know and believe to motivate them to move to the next stage?</p> <p>This is the foundation of the copy and content you need to create at each stage of the process.</p>	<p>KEY MESSAGE</p>	<p>Need a compelling "hook" to get their attention. The goal of awareness is to intrigue a potential buyer with a strong POV or insight into their industry, competitors, trends or the macroenvironment. Reference their pains/gains, your marketing efforts should communicate that you have a new and better way of doing things. This is your brand promise.</p> <p>What will your business deliver?: (These are your 3 core value propositions).</p> <p>1:</p> <p>2:</p> <p>3:</p>	<p>Communications need to explain how your product will help the buyer reach their business goals.</p> <p>Explain why your product is different and a better solution from others in the market.</p> <p>Product feature/Benefits</p> <p>1: /</p> <p>2: /</p> <p>3: /</p>	<p>Communications should showcase scenarios of how people use your product, highlighting core, differentiated capabilities, and the outcome -- these are sometimes called "use cases". You also need to deliver "proof" that what you're claiming is real.</p> <p>Emphasize Use Cases + Core Capabilities + Outcomes + Proof</p> <p>1:</p> <p>2:</p> <p>3:</p>	<p>Communications for renewal start at the moment of sale and are meant to:</p> <ol style="list-style-type: none"> 1) Demonstrate you care about the relationship by continually providing value to your customers. 2) Inform customers about new product offers. 3) Promote frequent use of product and capabilities. 4) Esure satisfaction with product and customer/company relationship. <p>These communications consist of:</p> <ol style="list-style-type: none"> 1) Thought leadership -- defined as having a strong POV of what is happening in the industry, the competitive environment your customers operate in, macro-environmental impacts, what's coming in the future and how that will impact them. 2) Product + Company news -- fixes, updates, new capabilities, services, partners, etc. 3) How to get more value out of the product 4) Primary research tracking user satisfaction and brand perceptions (quarterly or annually). This is above and beyond what happens at a transactional level. 	<p>Well before renewal, you should be tracking and communicating to your customers what they have accomplished with the help of your product, how they stack up vis-a-vis their industry counterparts, and what they can do to get more value from you as a partner and the product. (SEE RETAIN communications).</p> <p>A natural outcome of a healthy, on-going relationship is that your customers will buy more from you. Selling more to existing customers is more profitable and faster than selling to someone you don't have a relationship with.</p> <p>Up-sell (sell a higher priced product), Cross-sell (sell a different product you offer) are part of "retain" which is essentially Relationship Marketing or Customer Marketing.</p>

PART 2: CREATING COMMUNICATIONS CONTINUED

		ATTRACT Committed to Change	CONVERT Committed to Finding Solution	CLOSE Committed to Making a Selection	EXPAND Committed to Buying More	RETAIN Committed to Renewing
<p>The type of content you create has to be relevant to the buyer, their industry and the stage of the relationship. From your buyer profile, you should know type of content they need, want, and engage with. Different target audiences need different things.</p>	CONTENT	<ul style="list-style-type: none"> Blog Posts Contributing articles Videos Industry reports Speaking engagements Press releases Analyst reports 	<ul style="list-style-type: none"> Case studies, white papers, ebooks, infographics, one-pagers Webinars Events Company overview, product walkthrough videos Community Product reviews Podcasts 	<ul style="list-style-type: none"> Customer logos, testimonials, videos, case studies, success stories and social proof ROI tools Product Demos Promotions/Free Trials Comparison charts (vs. top competitors) Customer references 	<ul style="list-style-type: none"> Quarterly business review Customer surveys Referral program Newsletter Online In-person training Inspirational and instructional videos Events Product launches, product release notes SWAG 	<ul style="list-style-type: none"> In addition to what's mentioned in RETAIN Promotional offers Advisory board
<p>The channels you invest in depends on where your ideal clients go for information about their industry, competitors, products like yours, career development, and networking.</p>	CHANNELS	<ul style="list-style-type: none"> Advertising Website Blog Media Relations/PR Search (SEO) Social media Events Conferences Partners Networks 	<ul style="list-style-type: none"> Content syndication Website SEO SEM Media Relations/PR Social media Events Conferences Partners email Chat SMS Online communities, groups, networks 	<ul style="list-style-type: none"> Sales Team Website Blog Social media Events Conferences email Chat SMS Partners Online communities, groups Podcasts 	<ul style="list-style-type: none"> Email Marketing Blog Podcasts Search (SEO) SEM Social media Customers Events Advocacy Referral programs Loyalty program Community 	<ul style="list-style-type: none"> Email Marketing Blog Podcasts Search (SEO) SEM Social media Customers Events Advocacy Referral programs Loyalty program Community
<p>What are the top 2-3 data points you plan to track to understand whether your marketing program is having a business impact?</p>	METRICS	<ul style="list-style-type: none"> Followers Visitors Inbound traffic Media mentions pickup 	<ul style="list-style-type: none"> Leads Qualified Leads Opportunities Conversion rates across the sales funnel 	<ul style="list-style-type: none"> Leads Qualified Leads Opportunities Conversion rates across the sales funnel Cost per conversion across the stages of the relationship 	<ul style="list-style-type: none"> Engagement rates: content, core product features Satisfaction scores Followers Recommenders Lifetime Value Churn rate 	<ul style="list-style-type: none"> Engagement rates: content, core product features Satisfaction scores Followers Recommenders Life Time Value