

# LeanData Buyer Persona Overview



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## Overview

### Why are Buyer Personas Used?

In many organizations, it's essential to categorize your leads and contacts into Personas. You may choose to segment your leads and contacts by certain characteristics such as job title, role, function, and level (e.g. manager vs. C Level) to better market or sell into the accounts you're actively targeting.

### Benefits

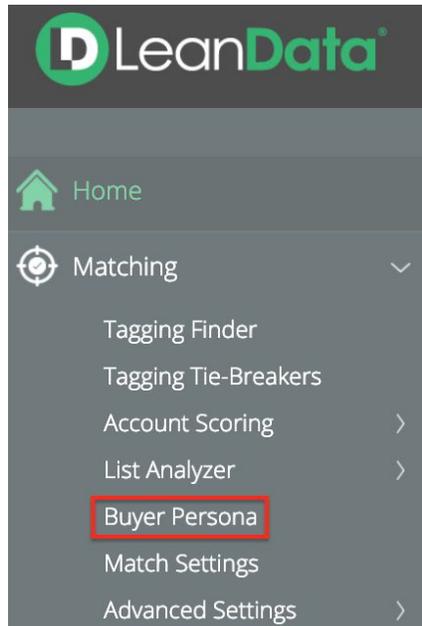
- Segment leads and contacts to effectively market to relevant groups
- Automatically mark leads and contacts with their persona information
- Continuously / automatically keep personas updated

### Use Cases

- Identify persona "white space" on account and opportunities - identify additional roles or personas that you need in your opportunities and which have been successful for you.
- Segment marketing by various personas
- Enable nurturing in marketing automations by persona

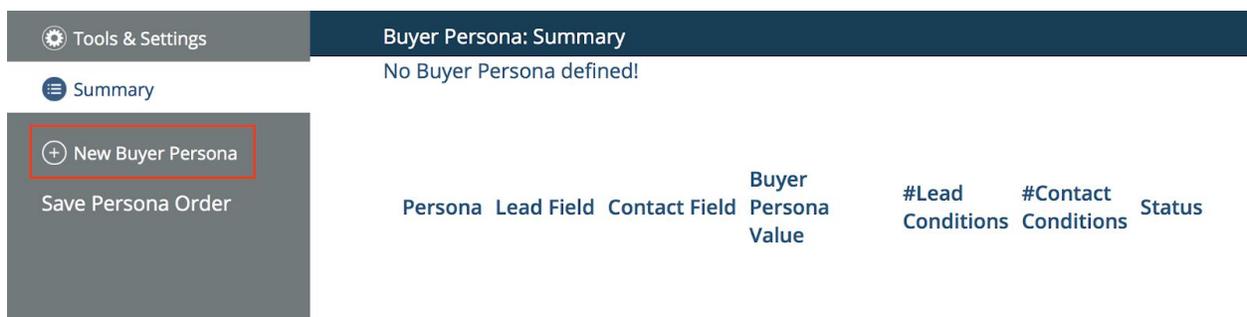
## How to Access Buyer Persona

In order to access the Buyer Persona section of LeanData, you can go to the application within your Salesforce instance and click into the matching section, click the Buyer Persona tab. If you do not have access to the Buyer Persona feature, please reach out to your Customer Success Manager.



## How to Set up Buyer Persona

To set up a Buyer Persona, click into New Buyer Person tab.



1. Set the title for your Buyer Persona. This is how you will identify the Persona you are defining.
2. Choose the Lead and Contact field you would like to populate with the Buyer Persona Value. If you have not created the field, create the field in your SFDC instance before continuing with Buyer Persona set up.

- Set the Buyer Persona Value to be populated on the Lead and Contact field you have selected. The Buyer Persona Value can be number or text field. It is up to your organization what value you would like to be populated onto the field.

Buyer Persona: Details

1 Title 1st Test BP Active Inactive

2 Lead Field Buyer Persona Contact Field Buyer Persona 3 Buyer Persona Value 1

## Defining your Buyer Persona Parameters

- Choose the Lead fields you would like to use to define your Buyer Persona.
- Under Operator, click the down arrow on the right side to choose the type of Operator to use.
- Set the value you would like to use from the field. You can set more than one value by using “,” in between.
- Click into New Entry to add more fields to be used
- Filter Logic will let you combine your logic with AND / OR statements
- If you would like to remove the field, click the delete option
- If needed, you can define Buyer Personas at the Contact level by repeating steps 1-6 in the Contact Section
- Click the Save button

Lead (3 conditions)

Field	Operator	Value	Action
1. Title	contains	CMO, Marketing	Delete
2. Industry	equals	Technology, Software, Info	Delete
3. Company	equals	Test	Delete

4 + New Entry

5 - Remove Filter Logic

1 OR 2 OR 3

7 Contact (1 conditions)

Field	Operator	Action
1. --None--	--None--	Delete

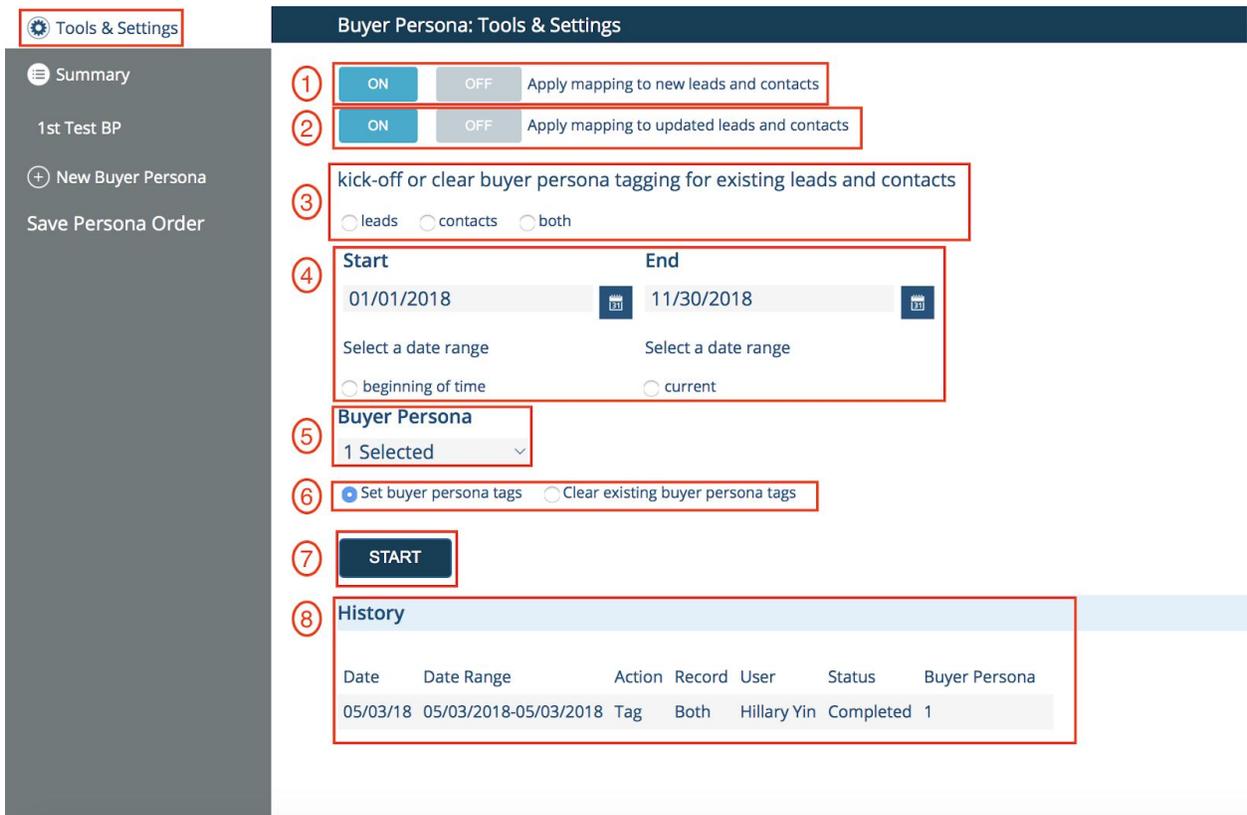
+ New Entry

- Remove Filter Logic

8 SAVE CANCEL

## Buyer Persona: Tools & Settings

1. Choose to Turn On or Off the setting to apply the mapping to new Leads and Contacts.
2. Choose to Turn On or Off the setting to apply the mapping to updated Leads and Contacts.
3. Choose to kick-off or clear buyer persona tagging for existing leads and contacts.
4. Choose the Start and End Date range.
5. Choose the Buyer Persona by clicking the down arrow. You can select more than one Buyer Persona.
6. Choose to Set Buyer Persona tags or to clear the existing Buyer Persona Tags
7. Click into Start icon.
8. The history of the Buyer Persona Record can always be viewed in the history frame.



The screenshot shows the 'Buyer Persona: Tools & Settings' interface. On the left is a sidebar with 'Tools & Settings' selected, and options for 'Summary', '1st Test BP', 'New Buyer Persona', and 'Save Persona Order'. The main content area includes:

- 1:** Toggle for 'Apply mapping to new leads and contacts' (ON).
- 2:** Toggle for 'Apply mapping to updated leads and contacts' (ON).
- 3:** Radio buttons for 'kick-off or clear buyer persona tagging for existing leads and contacts' (leads, contacts, both).
- 4:** Date range selection for 'Start' (01/01/2018) and 'End' (11/30/2018) with calendar icons and options for 'beginning of time' or 'current'.
- 5:** 'Buyer Persona' dropdown menu showing '1 Selected'.
- 6:** Radio buttons for 'Set buyer persona tags' (selected) and 'Clear existing buyer persona tags'.
- 7:** 'START' button.
- 8:** 'History' table showing a record.

Date	Date Range	Action	Record	User	Status	Buyer Persona
05/03/18	05/03/2018-05/03/2018	Tag	Both	Hillary Yin	Completed	1

Questions? Contact [support@leandatainc.com](mailto:support@leandatainc.com)