

Looking to generate better sales leads?

Client personas help you boost sales and build engagement around the investors you want to attract.

Creating an effective client persona.



Rich, meaningful data about your investors is the path to better decision-making and greater sales success. Yet significant insights about your investors too often remain locked inside the minds of your sales team.

How do you transfer that knowledge so that it feeds into your firm's lead-generation processes and creates higher-quality sales opportunities? One way is by building client personas you can use to fine-tune your targeting and engagement. Here are four steps to help you get started.



STEP ONE

What to ask:

Who are the people we need to reach to create business growth?

What to do:

Invite your sales team to create a detailed, complete portrait of your ideal investors.



STEP TWO

What to ask:

What insights can we measure about our target investors? (*How do they prefer to communicate? Where do they spend their time online?*)

What to do:

Work with your technology and sales enablement partners to gather analytics on investors you want to engage with—use what you know about them to guide communications and marketing.



STEP THREE

What to ask:

Can we round out our persona with psychological elements such as what our ideal investors care about?

What to do:

Ask the sales team to provide as much detail as possible on the attitudes, worries, hopes, and dreams of your ideal client.



STEP FOUR

What to ask:

How will we use our investor persona to help us create more effective marketing programs and communications targeted to our ideal investor?

What to do:

Document your client persona with input from sales and other colleagues and regularly revisit it to help keep your lead generation, marketing, and investor engagement strategies on track.

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To help you start building your client persona, work with colleagues and stakeholders to answer the following questions about the investors you most want to reach. Keep in mind that you may need to build more than one persona for different investor audiences, depending on your business objectives.

Part 1: Pain Points

- What are the biggest challenges facing your ideal investor?
- What do they see as their most significant risks?
- What information or reassurance might make a difference to this investor?

Part 2: Aspirations


- How does your ideal investor define success?
- What are their goals—financial, personal, and otherwise?
- What does your ideal investor value most?


Part 3: Preferences


- How, and how often, does your ideal investor expect to meet with you?
- What frequency and types of communications does your ideal investor want and need?
- What are the service expectations of your ideal investor?


Using a 4D perspective to build compliance partnerships that support your strategy.



 Gather investor insights from your sales team

 Apply data about investors' preferences

 Differentiate your approach based on investor pain points

 Deliver engagement built around your ideal client

Learn more about 4D at ulicny.com/4d-ulicny-method-utool.