Tool:
Persona mapping

netwealth

Customer persona:

What defines the individual?

Demographics	Attitudes	Technology	Activities

What defines the customer?

Gain	Pain	Influence

Example Customer persona: The weekend entertainer

What defines the individual?

Demographics	Attitudes	Technology	Activities
• 58 year old • Educated, employed • High h/h income • Married with 2 children aged >18, who do not live at home • Owns home • Lives in a major capital city	• Loves entertaining • Likes being amongst people – life of the party • Likes brand names over no-names • Prefer to holiday overseas	• Loves his big screen TV • Likes researching for things on the internet • Doesn't really use his mobile, only when he has to • Doesn't understand social media, YouTube	<u>Weekday</u>: BDM for privately owned commercial lighting company – has been there for 10 years. Spends a lot of time on road <u>Weekend</u>: Entertains guests, likes cooking, movies, theatre, dinners, etc.

What defines the customer?

Gain	Pain	Influence
• Considering retirement in next 10 years • Wants to have holidays every year • Wants to maintain current standard of living • Wants to accumulate property so can leave each child one	• Currently has no idea of what they spend. Hates budgeting. • Is nervous about their mental health – parent had dementia	• Gets investment tips from mates, Allan Kohler; reads the AFR • Relies on his accountant for tax advice • His wife is an actuary, so does the numbers