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# **Improve Demand Generation Targeting and Engagement Across the Buying Team With B2B Buyer Personas**

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## Improve Demand Generation Targeting and Engagement Across the Buying Team With B2B Buyer Personas

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Initiatives: Go-to-Market Strategy

Well-defined buyer personas for demand generation can improve alignment and performance of marketing and sales. Product marketers should use personas to improve segmentation, relevance of messaging, content and calls to action via the right channels, and more effectively engage buying team members.

### Overview

#### Key Findings

- Personalized buyer experiences result in deeper engagement, but technology purchases are undertaken by teams. The buying process can be delayed if too much focus is placed on individual priorities without context to the organizational goals.
- Disconnected demand generation tactics targeted at a broad audience of buyers are less effective than integrated efforts targeted at specific buyer and enterprise personas as part of a comprehensive program.
- Many persona efforts are undermined by their complexity, a lack of adoption and poor awareness of how best to target specific attributes of personas, resulting in buyer personas being unused or underutilized.

#### Recommendations

To improve the performance of demand generation programs as part of their go-to-market strategies, technology product marketers should:

- Incorporate target organizational needs and goals into demand generation strategies alongside individual buyer attributes by leveraging enterprise personas together with buyer personas.

- Develop consistent approaches to audience targeting, storytelling, content strategies and selection of communication channels by leveraging buyer personas to inform integrated demand strategies.
- Drive alignment and adoption of persona use across all demand generation programs by implementing a required training program for key stakeholders including agency partners, internal marketing teams and sales development representatives (SDRs).

## Introduction

A set of well-crafted buyer and enterprise personas serves as a foundational reference for product marketers and stakeholders from sales, services, marketing and agencies to deliver effective demand generation programs. Personas ensure that programs target the right audience and deliver engaging messages through channels where buyers go for information that moves them through their journey in a connected and compelling manner.

Yet personas can be leveraged for a number of different purposes across product management, product marketing, sales and services, such as user personas applied when designing digital and product user experiences. There may be an overlap between buyer and user personas, but the intent in how they are applied in practice is different. When designed with too many purposes in mind, personas increase in complexity and often overwhelm and confuse intended stakeholders. As a result, the personas are unused or underutilized. Buyer personas should be developed for individuals involved in the buying decision, rather than for every person who needs to be informed downstream as a purchase is being considered or product is used downstream. To build buyer personas with demand generation in mind, product marketers need to consider how marketing and sales will leverage the various components to develop and execute demand generation programs.

Building buyer personas with specific demand generation use cases in mind is only the beginning. Elevating buyer personas to the point that they become essential parts of the standard toolkit for demand generation requires product marketers to educate stakeholders on the various ways they should be applied. To keep them fresh and relevant as the business evolves and buyer characteristics change, it is important to undertake at least annual review and revision cycles to educate stakeholders across marketing and sales. Part of this process should include feedback sessions where stakeholders provide input on what works and what doesn't, as well as how buyer characteristics evolve.

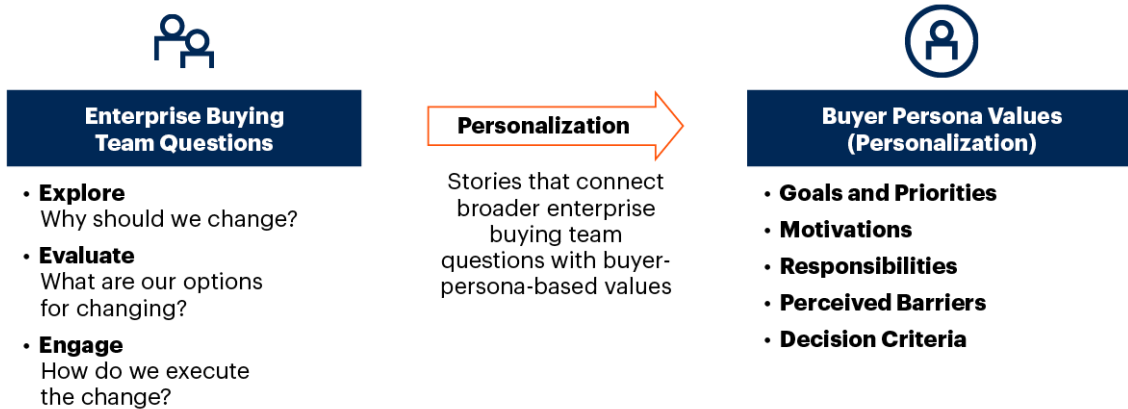
## Analysis

### Incorporate Both Enterprise and Buyer Values in Storytelling

The most effective demand generation campaigns incorporate both individual and account-level messaging and targeting. Technology marketers who don't consider whether individual buyer personas are associated with an ideal target account risk attracting the right buyer from an enterprise that does not fit their ideal customer profile, making them less attractive from a sales opportunity perspective. Messaging storylines must consider that while individual buyer personas are engaged in buying cycle activity streams, they are collectively seeking to answer three high-level questions. Answering these questions helps to move buyers through each step together as a team and build consensus along the journey (see Figure 1). To avoid scenarios where individuals from the buying team focus solely on personal needs without consideration of how those needs connect to the organization's goals, key stories told must incorporate both individual and organizational values.

**Figure 1: Questions to Answer That Balance Enterprise Buying Team and Individual Values**

#### Questions to Answer That Balance Enterprise Buying Team and Individual Values



Source: Gartner  
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To build understanding of the concerns influencing the purchase decisions of specific buyer personas, technology marketers must evaluate how to answer key questions that contribute to their buying profiles. These cues should be incorporated into individual buyer personas to support personalization of messaging and content offers for demand generation programs, while maintaining connection to the broader enterprise buying team's concerns:

- **Goals and Priorities** – What am I trying to achieve, and how am I evaluated in relation to the organizational change?
- **Motivations** – Why is the organizational change important to me professionally and personally? How is success measured relative to desired outcomes?
- **Responsibilities** – What are my related daily activities, and what would make them easier?
- **Perceived Barriers** – What are my fears and frustrations around the changes that are keeping me from being my best?
- **Decision Criteria** – How will I evaluate potential solutions based on my role, and how does it relate to broader organizational goals?

All the messaging storylines must be compatible across audiences and activity streams. Do not tell one audience something different from another audience (see [Personalizing Content for Your Buyers: Targeted vs. Too Much](#)). Follow Gartner’s recommended communication process:

- Positioning should remain the same throughout all storylines.
- Messages should be adapted to meet the specific needs of the audience and buying activity stream pairing in each corresponding storyline.

## Develop and Apply Buyer Personas Built for Demand Generation

To leverage buyer personas for demand generation and to increase the adoption and use across marketing, sales, services and agency partners, as well as ensure consistent, integrated programs, technology marketers need to design them with specific use cases in mind. We outline four common high-value demand generation use cases for the development of this type of buyer persona:

1. Define the data profiles for individual target buyers involved in the buying cycle activity streams.
2. Develop key messaging storylines that drive buyer awareness and preference for your company and products.
3. Develop a content strategy that results in engaging experiences for your target buyers.

4. Select marketing channels for stories and content that reach the intended audience in the right place at the right time.

Individual buyer personas developed with these key use cases in mind provide a well-rounded foundational reference for marketing and sales to enable delivery of consistent, integrated demand generation programs (see Table 1). Account-based marketing programs may use similar use cases for demand generation programs, but marketers may include more details in the buyer persona pertaining to how the traits of the individual buyer may change as target accounts in the program change.

**Table 1: Individual Buyer Persona Characteristics for Demand Generation Use Cases**

Individual Target Buyer Profile	Key Storytelling Considerations	Content Strategy	Marketing Channel Preferences
<ul style="list-style-type: none"> <li>■ Demographic data</li> <li>■ Technographic data</li> <li>■ Psychographic data</li> </ul>	<ul style="list-style-type: none"> <li>■ Goals and priorities</li> <li>■ Motivations</li> <li>■ Responsibilities</li> <li>■ Perceived barriers</li> <li>■ Decision criteria</li> </ul>	<ul style="list-style-type: none"> <li>■ Involvement in buyer’s journey stages</li> <li>■ Technology or business savvy</li> <li>■ Operational versus strategic-level interest</li> </ul>	<ul style="list-style-type: none"> <li>■ Regularly visited and trusted resources</li> <li>■ Contact preferences</li> <li>■ Accessibility</li> <li>■ Time of day</li> </ul>

Source: Gartner (December 2021)

Each of the high-level use cases includes some examples of where the related persona characteristics can be applied in the development of demand generation programs. These are provided as examples and not intended to be an all-inclusive representation of how technology providers can leverage buyer personas.

**Target Buyer Profile**

As part of the buyer persona, technology marketers should include the specific data values to be used in developing target audience data profiles. Buyer-specific data can come from a variety of internal and external sources. Examples of data sources include CRM, web forms on landing pages and websites, and providers of revenue data solutions that incorporate these data characteristics with their profiling tools. These persona characteristics should be organized under the target buyer profile section:

- **Demographic Data** – characteristics such as job titles, job functions, job roles and job levels.
- **Technographic Data** – specific technologies they currently use and certifications they have acquired.
- **Psychographic Data** – specific topics or interests they may be following related to the industry, their role or key interests and any specific brand association or affinities they may have within the industry or related technologies. An example of this would be utilizing LinkedIn profile data to discover with which groups target buyers might be connected. This profile data could provide information regarding the target buyers' technology brand preferences to build a more robust understanding.

Technology marketers should use the persona target buyer profile to define target audiences for specific campaign tactics included in the demand generation program plan. This should also include advertising media placements and the development of outbound email target lists.

## **Example Applications for Target Buyer Profile Characteristics**

### **Advertising or Media Planning**

When developing an advertising or media plan, technology marketers may work directly with industry, digital and social media partners, or with an agency that will provide buyer personas to these media partners as references on which to build plans. The result will be a recommended set of advertising placements to promote key messages and content with a calculation of the number of impressions, or reach, for specific media targeted at the buyers based on the profile criteria provided.

### **Outbound Prospecting**

Effective outbound email and phone-based and social demand generation efforts target a specific set of personas with messages that speak about what they value personally, as well as their organizational goals. This is not possible without a clear definition of how to identify the specific target audience from a data profile perspective included in the buyer persona.

## **Key Storytelling Considerations**

Gartner research shows that to engage buyers most effectively, the stories technology marketers tell must put the buyer situation at the center of communication efforts. Key storytelling elements for a buyer persona should include buyers' needs, wants and desires, as well as their attitude and involvement in the buying decision – with respect to the broader buying team. The “Questions to Answer” for buyer personas (see Figure 1) should be included in the buyer persona and used to develop effective stories.

Key storytelling considerations provide solid foundations for personalizing the storylines that make up the content. These include case studies, product brochures, webinars, demonstrations and telemarketing guides, making them more relevant to buyers with similar need sets, values and decision criteria. This promotes the use of a common theme that connects to the values of the buying team at the enterprise level.

## **Example Applications for Key Storytelling Considerations**

### **Advertising Copy**

To increase effectiveness of demand generation advertising campaigns, rather than leading with product features without providing context as to why these are important considerations, technology marketers should focus on specific buyer situations, issues and solutions first. This copy should also communicate how resolving these issues on a personal level can help increase the buyer's ability to contribute to meeting broad organizational goals as part of the overall buying team objective.

### **Website Copy**

It is common for technology marketers to include a section on their website labeled “Who We Serve” that includes messaging and content focused on how they deliver specific value to the buyer personas included in their target account buying teams. Alternatively, audience-specific landing pages may be leveraged when a large number of different personas are addressed as part of demand generation programs.



An effective demand generation program connects the overall experience of the buyer. For example, a targeted buyer may see an advertisement that speaks to his or her specific values, click on the advert and be taken to a page on the technology provider website that reiterates the value proposition from the advertisement. The buyer then sees content assets that reinforce the story being told through the advertisement and on the webpage. Other examples of applications for targeted inbound campaigns include paid search and sponsored LinkedIn programs designed to engage with specific audiences.

## Content Strategy

Having a strategy for the development of downloadable content assets and other content categories that engage buyers and address typical questions associated with the stages of the buyer's journey is an important part of effective demand generation programs. It's not just the information included in the content but also the format that can influence whether buyers will be open to engagement. The connection between the messages delivered, the format they are in and the channels through which they are delivered all have to be considered at the same time. This is why technology marketers need to include all three as part of the buyer persona for demand generation. Specific persona details to include under the content strategy section of the persona include:

- **Involvement in the Buyer's Journey Stages** – What level of involvement does the persona have in the exploration, evaluation or engagement stages of the buyer's journey?
- **Technology or Business Savvy** – Taking into consideration the persona's target buyer profile, what is the likelihood (high, medium or low for each category) that the persona will consume content focused on the technical details versus business outcomes enabled by a potential solution?
- **Operational Versus Strategic-Level Accountability** – Based on key messaging considerations (and using a similar high, medium and low scoring methodology), is the persona accountable for operational or strategic-level business decisions, and how will this impact their role in evaluating a buying decision?
- **Content Type** – With which types of content does the persona prefer to engage? (For instance, white papers, videos, webinars, technical solution briefs or FAQs, among others).

The buyer persona content strategy can help technology marketers determine the content that is needed to support broad demand generation efforts and develop a plan for content development. This plan should first include a content inventory categorized by content type, product or service offering, key message or storyline, persona and stage of the buyer's journey. This will help identify what is needed to fill gaps in the demand generation plan and to prioritize the development of new assets.

## Marketing Channel Preferences

Technology marketers need to understand where target buyer personas go to learn what is happening in their industry, how the technology solution landscape is evolving, and how their peers are managing emerging issues and challenges. The best source for acquiring this understanding is to ask your customers and prospects directly while interacting through in-person or virtual events and meetings, over the phone, or with survey questions as part of a demand generation effort. This insight can be obtained through marketing surveys, a third-party agency, an inside sales organization or partners who speak with customers. Marketing analytics can also provide data to support these findings, such as response rates to emails and other outreach. These insights should be added to the buyer persona to inform where buyers will be most receptive to engagement. Some examples to consider including in the buyer persona are:

- **Regularly Visited and Trusted Resources** — Where do they go to educate themselves? Industry publications, industry events, role- or function-based publications, online communities and channels, user groups, vendor websites, vendor blogs and podcasts, for example.
- **Contact Preferences** — How do they prefer to be contacted? Email, text, social (LinkedIn, Instagram, Facebook, other), phone, mail, messaging (WeChat).
- **Accessibility** — How do they typically engage with media and content? Mobile device, desktop, television, radio, print.
- **Time of Day** — Do they set aside specific days or times to consume content? Do they prefer on-demand or live interactions? What else is happening in the environment at the same time? Do they listen during lunch breaks, while commuting, during specific office hours or in the evenings?

## Example Applications for Marketing Channel Preferences

### Selecting Marketing Channels

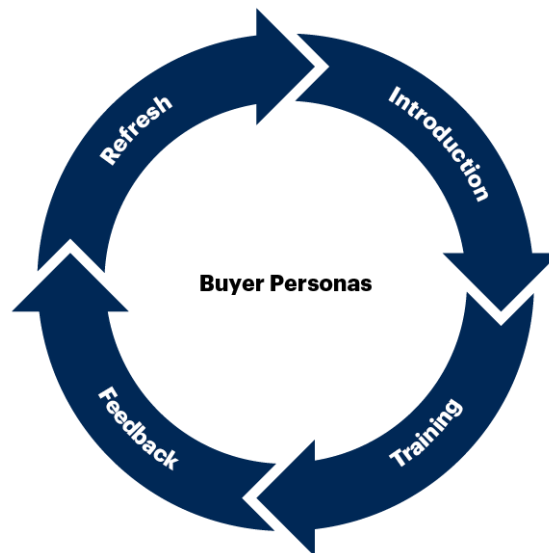
After messaging and content strategy are defined, selecting where those stories and related content will be delivered is the next component of an integrated demand generation program. Repurposing content throughout channels and in various content types will help reduce the resource requirements necessary to successfully execute a multichannel campaign effort. Many derivatives of one thought leadership piece can be leveraged through multiple channels, reinforcing the same story across a variety of touchpoints. Repetition creates a more memorable and consistent experience when derivatives of a single story architecture are leveraged across a number of different marketing channels. For example, the story could be leveraged for webinars, event presentations, a white paper and a blog series and promoted on LinkedIn, the website, third-party targeted media, paid search and a company newsletter over a certain period.

### Drive Alignment With Stakeholders and Agency Partners

Technology and service providers spend a significant amount of time defining and developing target markets and ideal customer profiles, as well as supporting go-to-market efforts. To drive alignment and use of personas by marketing and sales teams interacting with buyers, the product marketers should implement processes for introducing and providing regular updates and formal training regarding how to leverage buyer personas (see Figure 2).

**Figure 2: Driving Alignment Around Buyer Personas**

#### Driving Alignment Around Buyer Personas



Source: Gartner  
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## **Communicating the Introduction and Updates to Buyer Personas**

Regular town hall marketing meetings or conference calls are valuable forums in which to introduce personas, including use-case examples of how to use them in order to support ongoing demand generation efforts. To gain alignment with the marketing and sales leadership teams, technology marketers should include a review of any significant updates to target buyer personas and the rationale behind those updates as part of quarterly business reviews of demand generation programs.

Technology marketers need to also introduce new personas to external marketing agencies responsible for developing or supporting demand generation programs, as well as changes to buyer personas as they happen.

## **Training How to Apply Buyer Personas to Demand Generation Programs**

A formal rollout program to train individuals both inside and outside the company who are involved in demand generation programs needs to be developed for those in both marketing and sales roles. Whether in person or virtual, training should walk people through the anatomy of a persona and specific use cases like those described previously. Allow time in the training agenda for people to discuss current demand generation and selling programs they are working on and how they might apply the characteristics of each persona to add more value to the program and improve results. The training should also include directions on how to gather and provide input regarding how the various characteristics of the buyer personas are performing relative to their application in demand generation and selling programs.

## **Solicit Feedback to Keep Personas Relevant and Useful**

It is important to keep buyer personas updated annually (at a minimum), because buyer habits and characteristics evolve. Many organizations prefer to have personas updated prior to annual marketing planning and also consider them key parts of new product launch plans. Solicitation for input into personas should happen continuously as needed, but at a minimum 60 to 90 days prior to the start of the planning process with key stakeholders, including agency partners, internal marketing teams and SDRs. This ensures that the latest profiles are included in the annual plan. This feedback process is only successful when marketing and sales stakeholders perceive buyer personas as valuable resources in helping them do their jobs.

## Summary

For buyer personas to be considered foundational to demand generation planning and integrating personalization into programs, technology marketers must develop them with demand generation use cases in mind, such as persona targeting, key storytelling strategies, content strategies and marketing channels. However, having the right persona documents is not sufficient. Training key stakeholders on the various use cases for leveraging the personas and providing a forum for regular feedback are important parts of the life cycle of a demand generation buyer persona. Training and a feedback cycle help keep personas fresh, relevant and in use.

## Evidence

These best practice recommendations have been informed by thousands of Gartner technology provider clients on the topic of personas between 1 December 2019 and 1 December 2021.

## Acronym Key and Glossary Terms

CRM	customer relationship management
FAQ	frequently asked questions
SDR	sales development representative

## Document Revision History

Improve Demand Generation Targeting and Engagement Across the Buying Team With B2B Buyer Personas - 19 June 2020

Leverage B2B Buyer Personas to Personalize Demand Generation Programs and Engage Buying Teams - 7 January 2019

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## Recommended by the Author

Some documents may not be available as part of your current Gartner subscription.

The Enterprise Persona – Defining Your Ideal Customer Profile

Accelerate Buying Decisions Through a Customer-Centric ‘Questions to Answer’ Content Strategy

Market Guide for Revenue Data Solutions

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