

Customer Persona Framework — Reference Sheet

Build a persona that drives every conversation, message and tender you write

Why This Matters:

A customer persona is a detailed, research-based profile of your ideal client. It is not a market segment — it is one specific person. When you write for one person, your message lands with everyone who shares their situation. Every framework in this program — your value proposition, capability statement, tender language and LinkedIn profile — must be calibrated to this persona.

The 7-Component Persona Framework

Left column: what each component captures and the questions to ask. Right column: the CDD "Tier 1 Contender" as a fully worked example.

1 DEMOGRAPHICS

The factual profile — who they are on paper.

Ask: What role? What size business? What sector? Where?

TIER 1 CONTENDER EXAMPLE

- CEO / Owner / COO / General Manager
- Regional SME or mature high-revenue business
- Civil construction, earthmoving, heavy engineering, logistics or environmental services
- NQ / Townsville-based | 5–50 staff | \$2M–\$30M revenue

2 PSYCHOGRAPHICS

What drives them — motivations, fears and mindset.

Ask: What do they want most? What do they fear? What do they value?

TIER 1 CONTENDER EXAMPLE

- Motivated by legacy, market dominance, major contracts
- Fears contract rejection due to compliance gaps
- Anxious about operations they cannot fully control
- Transitioning from hustle mindset to governance mindset
- Protective of time, resources and hard-earned reputation

3 BEHAVIOURS

How they operate, decide and seek information.

Ask: Who do they trust? How do they buy? What influences them?

TIER 1 CONTENDER EXAMPLE

- Relies on vetted, high-trust advisors: accountant, lawyer, external CFO — not cold outreach
- Engages industry associations and peer networks
- Uses LinkedIn for B2B networking and credibility
- Monitors government tenders and compliance updates

4 PAIN POINTS

The specific problems keeping them up at night.

Ask: What is failing? What have they tried? Where are the gaps?

TIER 1 CONTENDER EXAMPLE

- Cannot prove capability on paper — skills undocumented
- Business is founder-dependent: "If I leave, it stops"
- Not on major project tender invite lists
- No formal WHS, QMS or governance documentation
- Overwhelmed by compliance mandates from bigger clients

5 GOALS & MOTIVATIONS

What winning looks like — commercial and personal.

Ask: What do they want in 3 years? What legacy? What contract?

TIER 1 CONTENDER EXAMPLE

- Achieve direct Tier 1 prequalification status
- Access multi-million dollar government / prime contracts
- Build a business that does not depend on them personally
- Establish ISO certification and auditable systems
- Leave a business that has real value beyond the owner

6 OBJECTIONS

What they will say before they say yes.

Ask: What past experiences make them hesitant? What risks feel real?

TIER 1 CONTENDER EXAMPLE

- "Is this just theory — or will it actually solve my problem?"
- "My team is already stretched. Is this more work for us?"
- "What if this doesn't work? Who else has done it?"
- "Why wouldn't I just hire a consultant to do it for me?"
- "How long before I see a real result from this?"

7 VOICE

The exact words, tone and language level they use naturally.

Ask: What phrases do they repeat? How technical is their language?

"We have the skills — we just lack the systems to prove it."

"I need operational certainty, not another binder full of theory."

"If I step away for a month, the whole business grinds to a halt."

Language Level: Plain-Trade to Business | Direct, practical, no jargon

Your persona is the foundation. Every other framework in this program is calibrated to it.

Value proposition • Capability statement • Tender language • LinkedIn profile • Discovery call questions

Customer Persona Worksheet — Build Your Own

Complete this for your primary client segment. Be specific — write for one person, not a market.

Your Persona Name / Title: _____

Target Industry / Sector: _____

Date Completed: _____

1 DEMOGRAPHICS

Role / Title / Company Size / Sector / Location / Revenue:

2 PSYCHOGRAPHICS

Core Motivations / Biggest Fears / Mindset / Values:

3 BEHAVIOURS

How They Find Information / Who They Trust / How They Buy:

4 PAIN POINTS

Top 3–5 Problems They Cannot Solve Alone Today:

5 GOALS & MOTIVATIONS

What Does Winning Look Like? 3-Year Vision / Legacy:

6 OBJECTIONS

What Will They Say Before They Say Yes? (list 3–4):

7 VOICE

The exact phrases, words and tone your persona uses. What language level? What do they repeat?

How to Apply Your Persona — 4 Key Uses

1 Marketing & Messaging

Write every message to this one person. Use their exact language. Speak to their pain before you mention your solution.

2 Discovery Call Preparation

Know their pain points before you call. Anticipate their objections. Ask questions that confirm what you already know about them.

3 Tender & Capability Writing

Frame your capability in the language of your persona's goals. Show you understand their procurement requirements, not just your own.

4 Product & Service Development

Every offer you build should solve a specific pain point from this profile. If it does not appear on this sheet, ask why you are building it.

4 Common Persona Mistakes to Avoid

Too Vague

"Business owners" is not a persona. Name a role, sector, size and location.

Too Aspirational

Build your persona for who buys from you today, not who you wish would.

No Real Quotes

A persona without verbatim language is a guess. Interview real clients.

Never Updated

Review and update your persona after every 3 new client conversations.

Once your persona is complete, it feeds every other framework in this program.

Your value proposition, capability statement, tender language and LinkedIn profile all follow from this single page.

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