**Company**: Describe type of business, such as: financial, service industry, etc.

**Time in title:** Include number of years in the role

**Reports to:** Typically advisors or board of directors

**Buying Process:** Typically decision maker

Briefly describe educational background and previous career experience. Add a high-level look at their path to business ownership. 



List five to seven main pain points here, such as:

* Staying profitable, ensuring systems and capacity for great customer service and finding good people
* Making sure we hit our growth numbers so we can provide job security for people
* I spend so much money on technology and it still seems like something is always breaking or we’re waiting for support.
* Keeping trust in my leadership high.

**Goal:** Describe overarching goal, such as: I want my company to grow and be a force for good in my community while being profitable.

**Drivers:** Describe the “why” behind the goal. Such as: I want to make a difference and do things right.

**Affiliations:** List a few places this person goes for information, such as: entrepreneur organizations, CEO roundtables, local chamber of commerce, trade shows, LinkedIn

**Top objections:** Describe what would turn this person off in the buying process, such as: I don’t
like a hard sell. I want to work with a partner that is interested in helping my company succeed.



*Include a quote that sums up this person’s mindset. Such as: “I set the vision, direction and tone of the company. I want a partner not a vendor.”*

In this section, describe the persona’s daily life at work, challenges and where they may have looked for help, such as: My days are about product management, efficient customer processes, business development and overall growth direction.

It’s my job to keep our company focused on our purpose and vision, too. It’s why we started our business and it helps motivate the team. Our goal is to achieve double-digit growth for the next two years while maintaining our profitability.

I must make smart purchases to stay profitable and keep jobs secure. I’m not completely happy with our current MSP.

In this section, describe why your company is the best choice for this persona, based on your unique selling proposition, such as: We are the smart choice and a good partner to help guide you. We understand your need to budget and see ROI. We create multi-year technology plans so you can meet your technology goals or upgrade those outdated systems in a planned manner. We keep your people running efficiently with the right technology. 