

Part II: Persona

Fill out this part of the worksheet, beginning with the bio/background information from the sample persona or another one that will be helpful for your work.

SAMPLE PERSONA



Bio/Background

- First-year intervention specialist
- Latina
- Close family ties

Goals

- Work-life balance as she prepares to have a family

Motivations

- Mentors and learning to help deepen special ed expertise and classroom management skills

Frustrations

- Unreasonable demands from current principal that take the joy out of teaching
- Struggling to keep her head above water

BIO/BACKGROUND

Years of experience (total): _____ Years at this organization: _____

Life Characteristics (e.g., in college or training; preparing for retirement; caring for older family, caring for children; leisure time focused on friends and social life, causes, etc.)

Employee Journey Stage

- Talent Acquisition (Recruit, Hire)
- Talent Development (Onboard, Develop, Perform)
- Total Rewards (Support, Reward, Transition/Exit)

Values (e.g., family, friends, social, cause-oriented, career, work-life balance)

Identity (could include generational alignment, racial/ethnic identity, gender, etc.)

GOALS

Based on the persona information on the previous page, what could you add to this individual's professional and personal goals, as well as a few motivations and frustrations?

1. _____
2. _____
3. _____

MOTIVATIONS	FRUSTRATIONS

BRAND AFFINITY

Are there any products or other brands that this persona could prefer? Knowing them could help you learn about how to approach them in your positioning.

1. _____
2. _____

POSITIONING STATEMENTS

Now, write one positioning statement in each column to highlight your total rewards for this persona.

PHYSICAL	EMOTIONAL	SOCIAL	CAREER	FINANCIAL

What's Next?

Take this worksheet back with you to help guide your next steps to refine more tailored total rewards messaging and visuals.

- How will you craft EVP messages aligned with prioritized personas?
- What actions will you take to capture and keep the interest of personas you prioritize?