

# Step One

Module Three  
Mini Lesson Guide

the  
marketing  
Democracy™

# Welcome!



While you may think about your business 24/7/365, your customers only think about you for a mere fraction of their day. If you interrupt your customers when they are busy doing other things, they will likely ignore you. The best marketing finds the right time and the right place to engage with customers when they're in the right mindset. This module introduces you to a technique known as persona building so you can find "marketing moments of truth" for your business.

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## Module Overview

In this module, we are going to focus on four key ideas:

- In [Lesson One](#), you will learn to see your customers as real people with lives that extend well beyond your business.
- In [Lesson Two](#), you will learn how to develop a "day in the life" of your customers so that you can see them as real people and understand the rhythms of their busy lives.
- In [Lesson Three](#), you will learn to identify the times and spaces that are right for you. You will also learn to identify where/when you don't belong.
- In [Lesson Four](#), you will learn to identify patterns among different customer personas that can guide your "big picture" strategy.

To help you create your customer personas, you can purchase a "Day in the Life Template." This downloadable PDF is fully functional if you open it in Adobe Acrobat Reader. Be sure to click on the "listen" icon in the lower right-hand corner to learn more about this helpful tool. And, for additional inspiration, you can watch the real-world example video to see this lesson in practice.

Congratulations on taking this important step in your journey to developing world-class marketing for your business.








# Lesson One

## Meet Your Customers--The Real People Behind Your Business Transactions

### Why This Matters

We begin this module with a dose of humility. Being “customer-centered” doesn’t go far enough. Your customers are only “customers” for a very small portion of their daily lives. Lesson One is designed to illustrate the differences between your customers and the real people behind those transactions. If you can understand your customers as real people, you can begin to connect with them in more meaningful ways. You may still only interact with them for just a small moment in their lives. But understanding their lives and knowing your place will make all the difference.

### 5 Key Takeaways

-  Large companies are often far removed from their customers. It's hard for them to get to know them first-hand. Other businesses have a more direct line of sight. Use this to your advantage--get to know your customers.
-  There is a significant difference between a customer and a person. A customer is no more than a transactional view of purchase behavior.
-  Your customers only play the role of “customer” for a mere fraction of their time. The rest of their time is spent living their lives and focusing on other things.
-  You should relate to your customers beyond their relationships with you. The more you get to know them, the better you will be able to serve them.
-  The best way to get to know someone is to talk to them. Start a conversation--either in-person or online and you will be amazed by what you can learn.



## Ask Yourself

**Before moving on to Lesson Two, take the time to reflect on this lesson.**

Do you understand the five key takeaways that were presented at the beginning of the lesson?

What do you know about your customers beyond their relationships with you? How far does that knowledge go? Think of this as two extremes: customers vs. people. Where does your knowledge fall?

If you could have a casual conversation with your customers, what questions would you ask in order to get to know them better?

Do you have a customer learning plan in place? What activities can you do either formally or informally to open up the pathways to learning about them?

# Lesson Two

## Build a "Day in the Life" of Your Customers

### Why This Matters

In lesson one, we made the case for getting to know your customers as real people. In this lesson, we are going to provide you with the tools you need to accomplish this goal. In order to truly know your customers you need to walk a mile in their shoes. This lesson will show you how by introducing you to a technique known as persona building. If you can build a “day in the life” of your customers, you can begin to understand who they are, what they do throughout their days, and where you fit into the scheme of their lives.

### Key Takeaways

- When developing your marketing plan, create examples of real people and build your plan to engage with them. This technique is known as persona building.
- If your customers do not fit a single persona, build out as many personas as it takes to represent them properly. It's not uncommon to have a few personas to work with.
- Since you occupy only a small fraction of your customer's time and thoughts, construct a day in their life to fully understand who they are and how you fit into their schedule.
- While no two days are the same, look for patterns. If there are different time cycles for different types of days (for example: weekdays and weekends, or school-days and school breaks) be sure to build out both.
- Organize the day in the life clocks into dayparts based upon different activities and mindsets of your customer throughout the day. Don't feel constrained by traditional definitions of time.



## Ask Yourself

**Before moving on to Lesson Three, take the time to reflect on this lesson.**

Do you understand the five key takeaways that were presented at the beginning of the lesson?

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Have you built personas before? Or, are you starting from scratch?

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How many personas do you need to represent the main customer segments in your targeting strategy? Can you identify a real customer in each segment to serve as an example?

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Do you know everything that you need to know in order to build these personas, or are you missing key insights that you need to learn about your customers?

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# Lesson Three

Identify When You're Welcome  
and When You're Interrupting

## Why This Matters

Once you get to know your customers as real people and you understand the rhythms of their daily lives, you can identify where and when your customers will appreciate hearing from you. There is a significant difference between “reaching” your customers and engaging them. Marketing communication that reaches customers at the wrong times can actually damage relationships. Lesson three is designed to help you learn when you are welcome and when you are interrupting so that you can focus on the moments that count. It’s good for your customers and it's good for your bottom line.

## Key Takeaways

-  There’s a right time and place to engage with your customers. Know when you’re welcome and when you’re interrupting.
-  Just because someone is using a particular marketing channel at a particular moment in time does not mean they are mentally available to receive your marketing message.
-  The most important (and humbling) step is to determine where and when you don’t belong. Avoid interrupting your customers when they are focused on other more important things in their lives.
-  Know the difference between where/when your customers directly interact with you and where/when they are thinking about you.
-  If you do the work, you can develop what is referred to as contextually relevant moments of truth--being in the right time, at the right place, with the right message.



## Ask Yourself

**Before moving on to Lesson Four, take the time to reflect on this lesson.**

Do you understand the five key takeaways that were presented at the beginning of this lesson?

Do you know the times and places when and where your customers would be most receptive to your marketing communications?

Do you currently interrupt your customers at certain times and in certain places when/where they are doing more important things? What can you do to avoid this?

Do you have strategies and plans for the two different mindsets of your customers: when they are thinking about you and when they are actively purchasing and/or using your products and services?



# Lesson Four

## Look for Common Ground Among Different Personas

### Why This Matters

Throughout this module, we have demonstrated how you can relate to your customers as real people in their daily lives. But not all marketing communication can be delivered to each person directly. You will need to keep it personal while broadening the scope of your efforts. This final lesson will focus on how you can identify common themes across your customers' lives that will enable you to broaden your appeal while still maintaining those important personal connections. These common themes can show up in many ways and we will provide you with the tools to uncover them.

### Key Takeaways



When building day in the life maps for different personas, you will begin to notice common themes. These themes lend important insights into what makes your business special.



By focusing on common themes, you can learn how far you can stretch across different customer segments without losing your connection to any one of them.



Common themes can be based upon many different factors that are described in the day in the life exercise. Be open and look for patterns just about anywhere and everywhere.

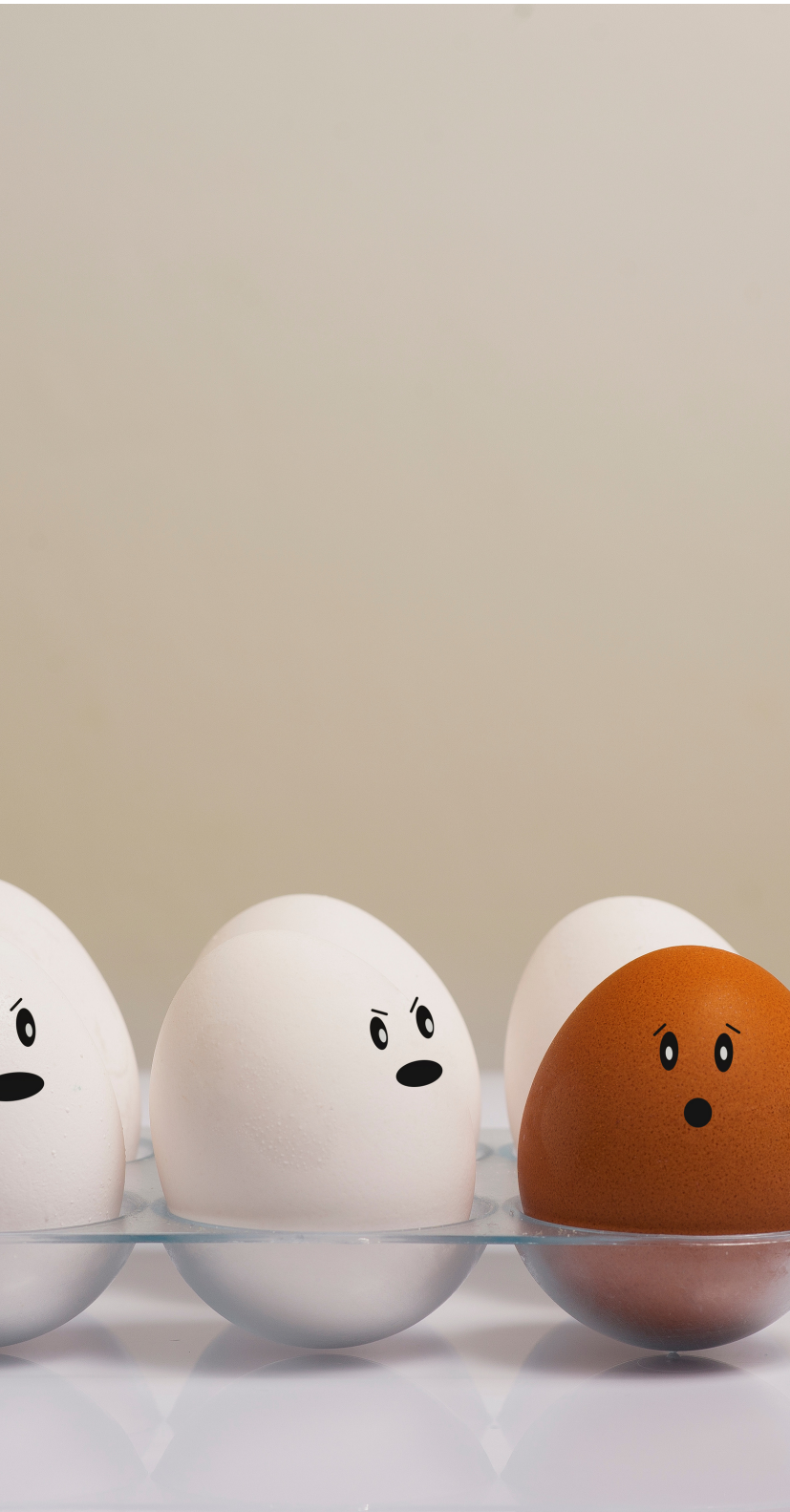


Different personas may use your products and services at similar times. You can use these common times to create a seasonality (time of year) and scheduling (day of week and time of day) strategy.



Different personas may have common lifestyle characteristics that can provide a great backdrop for your marketing communications strategy.





## Ask Yourself

**Before moving on to the action plan, take the time to reflect on this lesson.**

Do you understand the five key takeaways that were presented at the beginning of the lesson?

Do you understand both the similarities and differences among your customer segments?

Can you come up with a common theme that you can use to make your marketing communication relevant across your target segments?

What changes would you make to your current marketing approach to take advantage of these common themes?