Ashford Business Services Ltd

Customer Persona Sheet

This sheet describes one type of customer for Sarah Mitchell in enough detail that marketing, sales, and product decisions can be checked against a real person instead of a vague audience. A persona is only useful if it rests on research: record the research behind it at the end of this sheet, and review the persona when that research changes.

1. Persona snapshot

Persona label: James Patel

One-line description: One-line description of this customer type

Role or life situation: Role or life situation of this customer type

Quote in their own words: Quote capturing how this customer type describes their main problem, in their own words as agreed at the meeting.

2. Demographics and background

Age range: Age range of this customer type

Location type: £45.00

Occupation or sector: Occupation or sector of this customer type

Household or company size: Household size or company size relevant to this customer type

Education level: Education level typical of this customer type

Income or budget band: Income or budget band of this customer type

Background summary: Background summary: career, family, or business context that shapes this customer type as agreed at the meeting.

3. Goals

- Professional or business goal: Professional or business goal of this customer type
- Personal goal: Personal goal of this customer type
- Short-term milestone: Short-term milestone this customer type wants to reach
- How they judge success: How this customer type judges whether they have succeeded

4. Challenges and pain points

- Challenge or pain point 1 faced by this customer type, with how it affects them
- Challenge or pain point 2 faced by this customer type, with how it affects them
- Challenge or pain point 3 faced by this customer type, with how it affects them
- Frustration with current solutions: Frustration this customer type has with current solutions

- Obstacle to reaching their goal: Main obstacle stopping this customer type from reaching their goal

5. Motivations and values

- Value or motivation 1 that drives this customer type
- Value or motivation 2 that drives this customer type
- Value or motivation 3 that drives this customer type

What reassures them: What reassures this customer type when choosing a product or service

What puts them off: What puts this customer type off when choosing a product or service

6. Buying behaviour

How they research a purchase: How this customer type researches before buying

Who influences the decision: People or roles who influence this customer type buying decision as agreed at the meeting.

Who makes the final decision: Person or role who makes the final buying decision as agreed at the meeting.

Buying trigger: Event or situation that triggers this customer type to buy

Decision criteria in order: Decision criteria of this customer type, in order of importance as agreed at the meeting.

Common objection: Most common objection raised by this customer type

Answer to that objection: Honest answer to the most common objection

Price sensitivity: £45.00

Purchase frequency: How often this customer type buys in this category

7. Channels and communication

Channels they use most: Channels this customer type uses most often

Channels they trust most: Channels this customer type trusts most

Preferred tone: Tone of communication this customer type responds to best

Content they value most: Content type this customer type values most

Best time or context to reach them: 10:30 am

8. Journey with our offer

Awareness: How this customer type first becomes aware of an offer like ours

Consideration: What this customer type compares and checks during consideration

Purchase: What this customer type needs from the buying experience itself

After purchase: What this customer type needs after purchase to stay satisfied

Loyalty: What would make this customer type buy again or recommend us

9. What this persona should change

Message to emphasise: Message to emphasise for this customer type

Message to avoid: Message to avoid for this customer type

Offer or feature to highlight: Offer or feature to highlight for this customer type

Channel to prioritise: Channel to prioritise for reaching this customer type

10. Research behind this persona

Research sources: Research sources used to build this persona: interviews, surveys, sales records, or analytics

Number of customers researched: Number of customers or respondents behind this persona

Date of research: 9 November 2026

Known gaps in the research: Known gaps or assumptions in this persona that still need checking

Next review date: 9 November 2027

Sign-off

Prepared by: Sarah Mitchell

Date prepared: 9 November 2026

Approved by: Sarah Mitchell

Date approved: 9 November 2026