

Customer Personas & Market Segmentation — Workbook

This workbook turns the course into reps you can run on a real market. Each section mirrors one course module with hands-on exercises, fill-in worksheets, and checklists you apply to a product or service you actually care about. Pick one offer and carry it through every section, and you will finish with a sized market, two or three defined segments, an interview screener and guide, at least one evidence-backed persona, a scored prioritisation matrix, and a value proposition and message tailored to your chosen segment.

Foundations: Segmentation, Targeting, and Positioning

Get the STP sequence right, audit any persona you already have for fiction, and size your market with TAM, SAM, and SOM before slicing it.

Worksheet: Run Your Offer Through STP

Force yourself to separate the three jobs in order. Fill each field in sequence; do not skip ahead to positioning before you have a target.

Offer in one sentence (what you sell and to whom)

Segment: three or more candidate groups in this market

Target: the single group you will serve first and why

Position: how you want that group to perceive you versus alternatives

Personify: a one-line description of the person inside that target you will champion

Exercise: Fiction Audit of an Existing Persona

Take any persona you, your team, or a competitor already uses (or one you can imagine being made in a workshop). Score it against the evidence standard from the course.

- List every attribute on the persona, then mark each as Demographic, Goal, Trigger, Obstacle, or Decision-criterion.

- For each attribute, write its source (interview, survey, analytics, sales notes) or write NONE.

- Count what fraction of attributes have a real source versus NONE.

- Rewrite one decorative attribute (e.g. likes yoga) as something that would actually change a buying decision.

Worksheet: Bottom-Up Market Sizing (TAM, SAM, SOM)

Estimate the opportunity from your own unit economics, not a borrowed headline. Write down every assumption so a skeptic can challenge it.

Total potential buyers in your market (TAM count) and source of the number

Buyers you can actually reach and serve (SAM count) and the filters that narrow TAM to SAM

Realistic annual revenue per customer

SAM in revenue (SAM count multiplied by revenue per customer)

Target share of SAM in a defined period and resulting SOM in revenue

Checklist: Foundations Readiness Check

- I can state my Segment, Target, and Position separately and in that order.
- Every persona attribute I plan to keep has a real source or is flagged as a hypothesis.
- I have a bottom-up SOM in annual revenue, with assumptions written down.
- My chosen target segment is large enough in revenue to be worth pursuing.
- I have not written final positioning or messaging before deciding who I serve.

Choosing How to Slice: Segmentation Variables

Pick segmentation variables that actually change behaviour, write an Ideal Customer Profile if you sell B2B, and frame your segments as Jobs to Be Done.

Exercise: Test Your Candidate Variables

List the variables you are tempted to segment by, then put each through the does-it-change-behaviour test from the course. Keep only the ones that pass.

- List up to six candidate variables across demographic, geographic, psychographic, behavioural, and firmographic families.

• For each, answer: does a different value change the customer's NEED?

• For each, answer: does it change the MESSAGE that would persuade them?

• For each, answer: does it change their WILLINGNESS TO PAY? Keep only variables that change at least one.

Worksheet: Write Your Ideal Customer Profile (B2B) or Lead Segment (B2C)

If you sell to organisations, define the firmographic filter for a fit account. If you sell to individuals, define the lead behavioural or psychographic segment instead. Fill the fields that apply.

Industry or vertical (NAICS/SIC if known) — B2B

Company size band by employees and annual revenue range — B2B

Geography and language you can serve — B2B and B2C

Relevant context or tech (e.g. already uses a CRM you integrate with) — B2B

Lead behavioural or psychographic trait that defines the segment — B2C

Worksheet: Frame Segments as Jobs to Be Done

Write a job statement for each candidate segment in the when / want to / so I can format. Keep your product out of the sentence so it stays about the customer.

Segment A job: when [situation], I want to [motivation], so I can [outcome]

Segment B job: when [situation], I want to [motivation], so I can [outcome]

Functional, emotional, and social dimension of the primary job

The situation or trigger that sets off the job

Checklist: Segmentation Quality Check

- I am leading with a behavioural, psychographic, or job-based variable, not demographics alone.
- Each segment differs in need, message, or willingness to pay — not just on paper.
- I can describe each segment vividly AND find them with available data or tools.
- If B2B, I have an ICP for the account and know it is separate from the persona for the people.
- Each segment has a job statement with no product mentioned inside it.

Research: Talking to Real Buyers

Recruit the right people, run non-leading discovery and switch interviews, and validate the patterns at scale with a survey and your own analytics.

Worksheet: Interview Screener and Recruiting Plan

Define who qualifies before you recruit anyone, so you do not waste interviews on the wrong people. Decide your sources and incentive up front.

Three to five screener questions that qualify the right buyer or user

Target number of interviews per segment (aim five to eight) and number of segments

Recruiting sources (recent buyers, churners, communities, panel such as User Interviews or Respondent)

Incentive offered per interview and session length

Definition of saturation: how you will know you can stop

Exercise: Build a Non-Leading Interview Guide

Draft questions that talk about the person's past behaviour rather than your idea, following The Mom Test and the JTBD switch-interview structure. Rewrite any leading question.

- Write an opening story prompt: tell me about the last time you faced [problem].

- Write a timeline question that finds when the old way first stopped working, and a trigger question for what

finally pushed them to act that week.

- Write two anxiety questions about what nearly stopped them from switching.
- Find and rewrite one leading or hypothetical question (would you...) into a past-behaviour question.

Worksheet: Survey to Size the Patterns

After interviews, build a short survey that measures how common each pattern is. Derive answer options from the words buyers actually used.

Survey tool (Typeform, SurveyMonkey, Google Forms, Qualtrics)

Two to four questions, each measuring one job, pain, or decision criterion

Answer options drawn from verbatim interview language

Defining variables included so you can cut results by segment (role, size, behaviour)

Target sample size and distribution channel

Checklist: Research Integrity Check

- I screened participants and did not just interview friends or my happiest customers.
- I included recent switchers or churners, not only satisfied buyers.
- My questions ask about past behaviour, not predictions or opinions of my idea.
- I captured verbatim quotes with permission for use in personas and copy.
- I have a plan to size the qualitative patterns with a survey or analytics.

From Insight to Action: Personas, Prioritisation, and Messaging

Synthesise research into a sourced persona, score segments to pick a beachhead, and translate the winner into a value proposition, channel plan, and message.

Worksheet: Build One Evidence-Backed Persona

Synthesise your affinity-mapped themes into a single primary persona. Attach a source to every meaningful claim; if there is no source, mark it as a hypothesis.

Name and one-line summary capturing the role and the job

Core job to be done in when / want to / so I can form

Goals and desired outcomes that define success

Obstacles, anxieties, and objections (each with source)

Decision criteria and trusted information sources (each with source)

Two or three verbatim quotes, each labelled with its source

Exercise: Score and Pick Your Beachhead Segment

Use a weighted attractiveness matrix to choose objectively instead of emotionally. The companion xlsx template does the maths; use this exercise to set it up.

- List your candidate segments as the rows to score.

- Choose four to six criteria (size, growth, willingness to pay, reachability, pain intensity, fit) and assign weights summing to 100 percent.

- Score each segment 1 to 5 per criterion and let the template compute weighted totals.

- Name the highest-scoring segment as your beachhead and write one sentence on why you will win it first.

Worksheet: Translate the Persona into a Value Proposition and Message

Connect the persona's top job and pain to your offer using the Value Proposition Canvas logic, then turn it into a channel plan and a headline in their own words.

Persona's top job and most painful obstacle

Your pain reliever or gain creator that fits that job and pain

One-sentence value proposition for this persona

Channels the persona actually said they trust and use

Headline written in the persona's verbatim language, leading with their outcome

Checklist: Activation and Maintenance Check

- Every meaningful claim on my persona has a source or is flagged as a hypothesis.
- I designated one primary persona rather than keeping too many to remember.
- I chose my target segment with a scored matrix, not a gut preference.
- My value proposition relieves a pain or creates a gain the persona actually named.
- I scheduled a persona review (every 6 to 12 months) and a way to log new evidence.

Your Action Plan

1. Choose one product or service you own and will carry through the entire plan.
2. Run it through STP and write a bottom-up TAM, SAM, and SOM with assumptions noted.
3. List candidate segmentation variables and keep only those that change need, message, or willingness to pay.
4. Write a Jobs to Be Done statement for each candidate segment, and an ICP if you sell B2B.
5. Draft a screener and a non-leading interview guide, then recruit five to eight buyers per segment.
6. Run the interviews, capture verbatim quotes, and stop each segment at saturation.
7. Affinity-map the notes into themes and size the patterns with a short survey or your analytics.
8. Synthesise the findings into one primary, fully sourced persona.
9. Score your segments with the weighted attractiveness matrix and pick a beachhead.
10. Write a value proposition, channel plan, and message for the beachhead persona, and schedule a persona review.

