

Customer Persona Worksheet

A customer persona turns "everyone" into "someone" — and "someone" is a lot easier to build for. This worksheet has two halves.

Pages 2–4 — Build two or three personas

Resist the urge to build one "average" persona. Two or three distinct ones force you to admit your customer base is not monolithic, and they surface tension between user needs early — while it is still cheap to resolve.

Pages 5–7 — Walk the product as each one

Go through your product one persona at a time and answer as if you are that person. Answering honestly — even uncomfortably so — is where the real value shows up.

Type directly into the shaded boxes. If nothing types, save the file to your device and open it in a PDF reader — some phone previewers display forms without filling them.

Persona 1

Give this persona a name

A real-sounding name makes the rest easier to answer.

Where does your persona live?

Urban, rural, suburban — and what that changes about access, shipping, or space.

What do they do for a living?

Their schedule, their budget, and who signs off on a purchase.

What are their hobbies?

Where they already spend time — communities, publications, events.

What does their family situation look like?

Kids, pets, who they ask for recommendations.

Are they comfortable using technology?

What they will tolerate, and what they will need guiding through.

Where are they most likely to see your product?

The channels your marketing budget should actually go to.

Persona 1

How much are they already spending on something similar?

What they pay now, and what they wish were different.

Persona 2

Give this persona a name

A real-sounding name makes the rest easier to answer.

Where does your persona live?

Urban, rural, suburban — and what that changes about access, shipping, or space.

What do they do for a living?

Their schedule, their budget, and who signs off on a purchase.

What are their hobbies?

Where they already spend time — communities, publications, events.

What does their family situation look like?

Kids, pets, who they ask for recommendations.

Are they comfortable using technology?

What they will tolerate, and what they will need guiding through.

Where are they most likely to see your product?

The channels your marketing budget should actually go to.

Persona 2

How much are they already spending on something similar?

What they pay now, and what they wish were different.

Persona 3

Give this persona a name

A real-sounding name makes the rest easier to answer.

Where does your persona live?

Urban, rural, suburban — and what that changes about access, shipping, or space.

What do they do for a living?

Their schedule, their budget, and who signs off on a purchase.

What are their hobbies?

Where they already spend time — communities, publications, events.

What does their family situation look like?

Kids, pets, who they ask for recommendations.

Are they comfortable using technology?

What they will tolerate, and what they will need guiding through.

Where are they most likely to see your product?

The channels your marketing budget should actually go to.

Persona 3

How much are they already spending on something similar?

What they pay now, and what they wish were different.

Walk the Product as Persona 1

Answer as this persona, not as yourself. Write down the answers — this exercise routinely exposes assumptions founders did not know they were making.

1. What questions do I have as I use this?

2. Is anything confusing or unclear?

3. What's the smallest version of this I'd actually be willing to pay for?

4. What features would be "nice to have," but aren't essential?

5. What would I be willing to pay more for?

6. What would make me quit using this altogether?

7. How long would I realistically keep using this?

8. How likely am I to tell other people about it?

Walk the Product as Persona 2

Answer as this persona, not as yourself. Write down the answers — this exercise routinely exposes assumptions founders did not know they were making.

1. What questions do I have as I use this?

2. Is anything confusing or unclear?

3. What's the smallest version of this I'd actually be willing to pay for?

4. What features would be "nice to have," but aren't essential?

5. What would I be willing to pay more for?

6. What would make me quit using this altogether?

7. How long would I realistically keep using this?

8. How likely am I to tell other people about it?

Walk the Product as Persona 3

Answer as this persona, not as yourself. Write down the answers — this exercise routinely exposes assumptions founders did not know they were making.

1. What questions do I have as I use this?

2. Is anything confusing or unclear?

3. What's the smallest version of this I'd actually be willing to pay for?

4. What features would be "nice to have," but aren't essential?

5. What would I be willing to pay more for?

6. What would make me quit using this altogether?

7. How long would I realistically keep using this?

8. How likely am I to tell other people about it?