



marketing

KNOW YOUR USERS

User persona help us better understand and empathize with the real people who use our product - people like you!

At Salesforce, personas help us keep our users at the center of the design process. Our persona are research based to ensure that they truly reflect the people that use our products. Beyond title or role, our personas provide insight into users' work behaviors, motivations, goals, and the tools they use to get their jobs done.

We believe that when teams understand who they are building for and are versed in those users' needs and behaviors, then they can make better decisions about the products on their behalf.

USING THIS PERSONA PACK

Use these cards to help answer questions:

- What does my persona need to do first to get their job done?
- Which persona am I building or adding new features for?
- Given their activities, which features are a top priority for my persona?
- Which personas will be affected by the feature that I am building?

Consider telling Persona-based user stories:

As a Deal Closer I want to log all of my interactions with my customers so that I can follow-up and provide the information they need to make a purchasing decision.

”

As a Pipeline Builder I need to quickly see who I should call next so that I can meet my daily activity quota.

”



Designer-Developer

Create and code marketing assets

[Do I consider myself a marketer, or a designer, or developer?] It depends on the day, it depends on the hour sometimes.



MARKETING SOPHISTICATION LEVEL

Individualized

Real-time

Lifecycle

Segmented

CHANNEL SOPHISTICATION LEVEL

Single

Omni

6 hours per day spent in Marketing Cloud

TYPICAL ACTIVITIES

1. Design marketing assets
2. Code and test emails
3. Coordinate approvals across current marketing assets



user research



IT Services

Support marketing data operations

The only things I really do... are troubleshoot issues that we might have or help people design the next phase of their products that have to deal with email.



MARKETING SOPHISTICATION LEVEL

Individualized

Real-time

Lifecycle

Segmented

CHANNEL SOPHISTICATION LEVEL



< 1 hour per day spent in Marketing Cloud

TYPICAL ACTIVITIES

1. Manage infrastructure for the organization
2. Create APIs for data for the Marketing Cloud
3. Debug automations and journeys



Marketing Manager

Oversee teams, projects, and campaigns

[I love the] complex projects that I get to work on as well as really being able to build out that customer lifecycle program.



MARKETING SOPHISTICATION LEVEL

Individualized

Real-time

Lifecycle

Segmented

CHANNEL SOPHISTICATION LEVEL



3 hours per day spent in Marketing Cloud

TYPICAL ACTIVITIES

1. Active manager of people, processes, and strategic execution
2. Coordinate cross-channel messaging, cadence, and customer journeys
3. Help craft strategic direction
4. Approve content
5. Analyze campaign metrics



user research



Social Coordinator

Publish content, engage customers & analyze social data

The objective of social is to give a company the human element, and that's what we do.



MARKETING SOPHISTICATION LEVEL

Individualized

Real-time

Lifecycle

Segmented

CHANNEL SOPHISTICATION LEVEL

Single

Omni

1-3 hours per day spent in Marketing Cloud

TYPICAL ACTIVITIES

1. Draft and schedule social content
2. Triage and respond to incoming social posts
3. Listen and report on social analytics, metrics and trends



Marketing Specialist

Execute campaigns and leverage data to find insights

I like discovering new things. I like to test, I like to see how the campaign's performing, how my decisions bring some extra revenue and prove to my team, to my colleagues, that our decision was the right one.



MARKETING SOPHISTICATION LEVEL

Individualized

Real-time

Lifecycle

Segmented

CHANNEL SOPHISTICATION LEVEL



5

hours per day spent in Marketing Cloud

TYPICAL ACTIVITIES

1. Execute on marketing plan
2. Develop, schedule, and send marketing communications
3. Analyze data to drive decisions
4. Monitor campaigns



user research



Strategic Leader

Crafts marketing strategy based on data

If you read the email and there is something there that matters to you, the client, and it causes you to take action, then everybody just won.



MARKETING SOPHISTICATION LEVEL

Individualized

Real-time

Lifecycle

Segmented

CHANNEL SOPHISTICATION LEVEL



2 hours per day spent in Marketing Cloud

TYPICAL ACTIVITIES

1. Craft marketing strategy
2. Review dashboards to understand customer engagement, ROI
3. Provide direction to marketing team
4. Approve content for major campaigns