



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.

”



Data Expert

Forecast sales and do reporting

We have different teams that do different sales activities. I can make sure everyone in the sales organization has the data they need to do their job best.



TOP ACTIVITIES

1. Viewing or creating reports and dashboards
2. Customizing and administering Salesforce

3+

HRS/DAY

Reporting
Forecasting sales

1-3

HRS/DAY

Manage sales pipeline
Manage tools for sales team

SALESFORCE USAGE

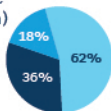
Heavy
Usage
57%



Light
Usage
23%

WORKING STYLE

Outside
(In Person)



Inside
(Remote)

No Customer Contact



Deal Closer

Work & close deals

I pretty much live off of my task list, it tells me what to do, once you get it down it makes your life a lot easier if you just learn to use it correctly.



TOP ACTIVITIES

1. Logging activities (calls, emails, notes)
2. Updating existing prospects and customers
3. Entering new prospects and customers
4. Reviewing and working through lists of leads/opptys

3+

HRS/DAY

Prep for sales calls and meetings

Demo solutions

Prepare quotes, contracts, proposals

Conduct in-person sales meetings

Close deals

SALESFORCE USAGE

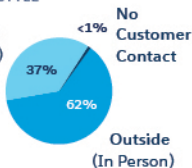
Heavy Usage
53%



Light Usage
41%

WORKING STYLE

Inside
(Remote)



Outside
(In Person)



Pipeline Builder

Prospect and nurture leads

It keeps me organized and knowing precisely what I am supposed to do in a given day.



TOP ACTIVITIES

1. Entering new prospects and customers
2. Updating existing prospects and customers
3. Logging activities (calls, emails, notes)

3+

HRS/DAY

Find new leads (outbound prospecting) and determine fit

Answer inbound leads

Qualify and nurture leads

1-3

HRS/DAY

Prospect for new optyps in existing accounts

SALESFORCE USAGE

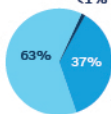
Heavy Usage
62%



Light Usage
31%

WORKING STYLE

Inside
(Remote)



No Customer Contact
<1%

Outside
(In Person)



Sales Leader

Manage teams, process, & tools

Salesforce allows me to keep track of progress, what is working, what is not working, how to adjust and refine the sales process and new customer process.



TOP ACTIVITIES

1. Viewing and creating reports and dashboards
2. Customizing and administering Salesforce
3. Collaborating with colleagues

3+

HRS/DAY

Manage & coach sales reps
Train sales reps on process/tools

1-3

HRS/DAY

Manage tools for sales team

SALESFORCE USAGE

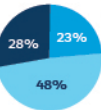
Heavy Usage
62%



Light Usage
29%

WORKING STYLE

Outside
(In Person)



No Customer Contact

Inside (Remote)



Trusted Advisor

Manage accounts

It's a great way to stay organized and store all account information and place orders all in one location.



TOP ACTIVITIES

1. Updating existing prospects and customers
2. Logging activities (calls, emails, notes)
3. Entering new prospects and customers

3+

HRS/DAY

Maintain relationships w/existing customers
Upsell products (grow deals)
Manage renewals

1-3

HRS/DAY

Prospect for new optpts in existing accounts
Gather requirements from prospects

SALESFORCE USAGE

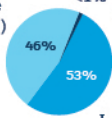
Heavy Usage
44%



Light Usage
45%

WORKING STYLE

Outside
(In Person)
46%



No Customer Contact
<1%

Inside
(Remote)
53%