

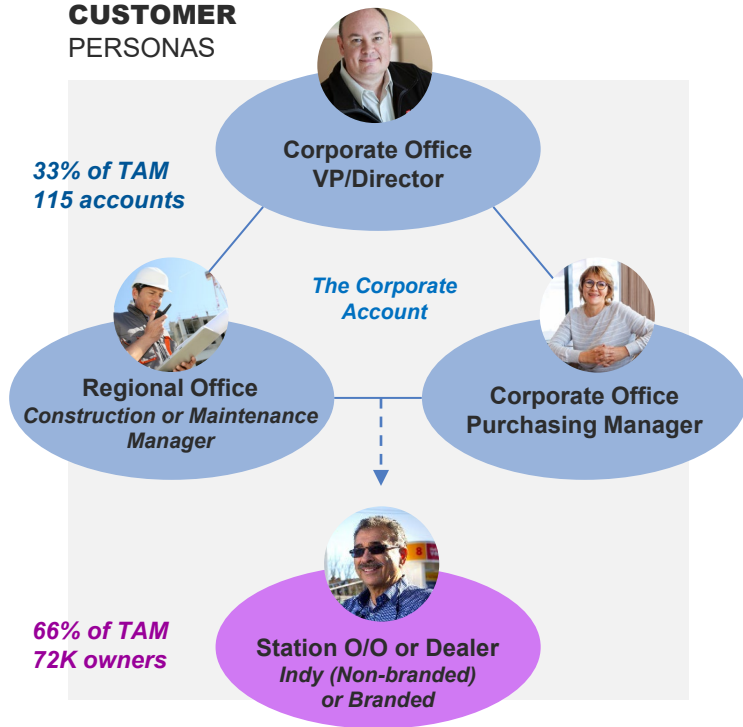


# CREE LIGHTING

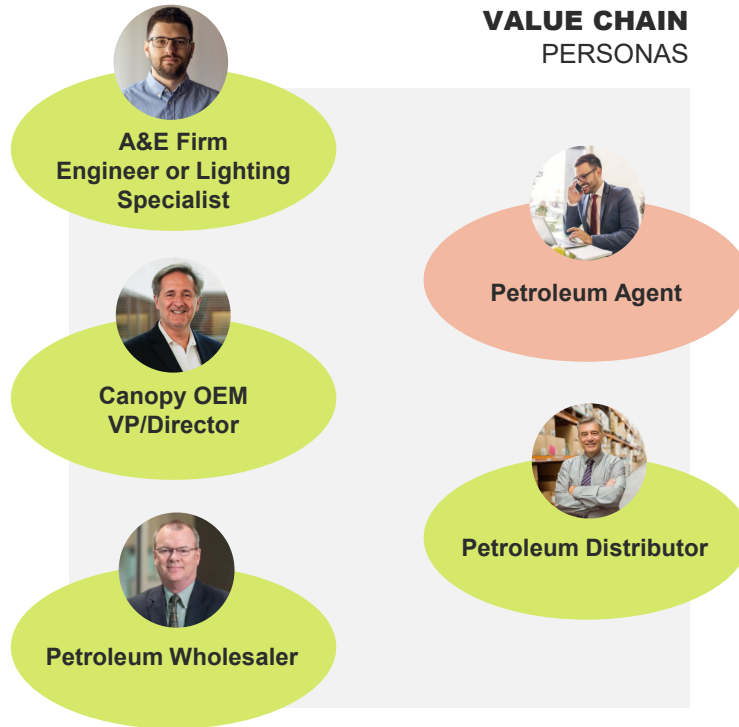
Petroleum Personas  
October 2020

# Target Audience Personas

## KEY END CUSTOMER PERSONAS



## KEY VALUE CHAIN PERSONAS



# Key End Customer Personas

# Persona #1: Corporate Office VP or Director - *Construction/Maintenance/Real Estate/Development/Brand*



Hi, I'm Tom.

## FUNCTIONAL ATTRIBUTES

### Job Role:

VP or Director

### Common Titles:

Construction, Maintenance,  
Real Estate, Development, Brand

### Position on Org Chart:

Executive, Reports to C-Suite

### Buying Center:

Operations, Oversees entire footprint

### Firmographics:

National or Regional Chains  
MM/BB Private or Public Corps  
100-500+ US & Can locations  
or Big Oil (minimal owned stores)

### Demographics:

Typically white male, 40-60yo,  
higher education (BS+MBA),  
married with kids, upper middle  
class, enjoys sports/golf

<b>EMOTIVE</b>	<b>Initiatives:</b> <ul style="list-style-type: none"> <li>In charge of the physical footprint and/or store image</li> <li>Oversees all new construction and remodel projects (50K foot view)</li> <li>Maintain safe and profitable locations nationwide</li> <li>Maintain supply contracts if applic.</li> <li>Keep store format competitive and on-brand, grow store footprint</li> <li>EMV regulations/upgrades</li> </ul>	<b>Challenges:</b> <ul style="list-style-type: none"> <li>Cash pressure from COVID</li> <li>Keeping projects on time, on budget, code compliant</li> <li>Balancing multiple initiatives and vendors at once, staying ahead</li> <li>Threats from new entrants (Big Box CS formats, AmazonGo, GoPuff)</li> <li>Consumer continually evolving (skewing younger, tech-savvy)</li> </ul>	<b>Buyer Need:</b> <ul style="list-style-type: none"> <li>Sees lighting as a cost, not necessarily a benefit, so best value to meet company standards (savings ROI to justify the decision)</li> <li>Wants VIP/white glove treatment from suppliers (streamline turnkey approach with added services)</li> <li>Confidence to justify decisions with rest of C-suite</li> </ul>	<b>Lexicon:</b> <ul style="list-style-type: none"> <li>Business value</li> <li>Competitive advantage</li> <li>ROI</li> <li>Warranty</li> <li>Project Schedule</li> <li>OTD</li> <li>Contingency or Confidence (%)</li> </ul>
<b>DECISION PROCESS</b>	<b>Buyer Role:</b> <ul style="list-style-type: none"> <li>Top decision-maker for setting the store spec and company-wide maintenance policies</li> </ul>	<b>Decision Drivers:</b> <ul style="list-style-type: none"> <li>(If there's a Big Oil contract) – Keeping the supply contract and relationship in good standing</li> <li>Up-front price and immediate energy savings</li> <li>Peace of mind                             <ul style="list-style-type: none"> <li>Influencer recommendation: Long-standing A&amp;E Firm</li> <li>Supplier reputation/relationship/prior experience</li> <li>Reliability, Warranty</li> </ul> </li> <li>Longer-term maintenance and operational savings</li> <li>Brand appearance and consumer loyalty                             <ul style="list-style-type: none"> <li>Competitive edge with better format as well as longer-range roadway visibility (brightness, optics); "Copy Cats"</li> <li>Better customer experience (cleanliness, safety, comfort, color) to grow in-store &amp; forecourt sales</li> </ul> </li> <li>Legal avoidance with improved visibility (accident/theft avoidance)</li> <li>(Controls Buyer) Easy, flexible, scalable controls for nation-wide code compliance (incl. Title-24) and streamlined install across entire footprint</li> </ul>		
<b>BEHAVIORAL</b>	<b>Content Asset Types:</b> <ul style="list-style-type: none"> <li>RFP bids/proposal packages                             <ul style="list-style-type: none"> <li>Store application layouts</li> <li>Project schedules</li> <li>Cost estimates</li> </ul> </li> <li>Sales presentations</li> <li>Supplier website</li> <li>Product info and spec sheets</li> <li>Marketing materials</li> <li>Customer testimonials/case studies</li> </ul>	<b>Interaction Types:</b> <p>Human Interactions:</p> <ul style="list-style-type: none"> <li>In-person or virtual sales meetings</li> <li>Team conference calls</li> <li>Colleague word of mouth</li> <li>Site visits / Demo installations</li> <li>Conferences</li> <li>Relationship builders (e.g. dinners, golf)</li> </ul> <p>Non-Human Interactions:</p> <ul style="list-style-type: none"> <li>Researching industry trending topics online</li> <li>Reviewing supplier website &amp; materials</li> </ul>	<b>Watering Holes:</b> <ul style="list-style-type: none"> <li>Trade Associations &amp; Conferences:                             <ul style="list-style-type: none"> <li>NACS – Natl Assoc C-Stores</li> <li>APCA – American Petro &amp; CS Assoc</li> <li>PMAA – Petro Marketers of Amer Assoc</li> <li>Geo/Regional Associations</li> </ul> </li> <li>Trade Magazines: NACS, CS News, CSP Magazine, CS Decisions, PetrolPlaza</li> <li>Business Magazines: WSJ, Inc.</li> <li>Social: LinkedIn (Professional) / FB (Personal)</li> </ul>	

## Persona #2: Regional Office Construction or Maintenance Manager



Hi, I'm Mario.

### FUNCTIONAL ATTRIBUTES

#### Job Role:

Regional or Field Manager

#### Common Titles:

Construction, Project or Maintenance Manager

#### Position on Org Chart:

Reports to Corporate VP/Director

#### Buying Center:

Operations, Oversees assigned regional footprint

#### Firmographics:

National or Regional Chains  
MM/BB Private or Public Corps  
100-500+ US & Can locations

#### Demographics:

Typically white male, 30-50yo,  
BS-Business or equiv. experience,  
married with kids, middle class,  
enjoys sports, cars, outdoorsy

<b>EMOTIVE</b>	<b>Initiatives:</b> <ul style="list-style-type: none"> <li>Oversees all new construction, remodel and/or store maintenance projects for their assigned region</li> <li>Maintain safe and profitable locations within their region</li> <li>Keep format competitive and on-brand (implement company-wide initiatives)</li> <li>Help grow regional footprint/reputation with upgrade projects</li> <li>EMV regulations/upgrades</li> </ul>	<b>Challenges:</b> <ul style="list-style-type: none"> <li>Keeping projects on time, on budget, code compliant</li> <li>Balancing multiple initiatives and vendors at once</li> <li>Very time crunched staying on top of all projects, Don't waste their time with low-value interactions</li> <li>Dealing w/ supplier issues (RMAs)</li> <li>Schedule setbacks</li> </ul>	<b>Buyer Need:</b> <ul style="list-style-type: none"> <li>Sees lighting as a cost, not necessarily a benefit, so best value to meet company standards (savings ROI to justify the decision)</li> <li>Make their job easier and minimize business disruption</li> <li>Application, installation and product info at their fingertips</li> <li>Confidence to justify decisions with superiors (VP/Director)</li> </ul>	<b>Lexicon:</b> <ul style="list-style-type: none"> <li>Business value / ROI</li> <li>Cost savings</li> <li>Competitive advantage</li> <li>Project schedule</li> <li>Supplier service metrics like OTD %, standard lead times, RMA lead times</li> <li>Warranty</li> </ul>
<b>DECISION PROCESS</b>	<b>Buyer Role:</b> <ul style="list-style-type: none"> <li>Champions the decision-making process and provides due diligence from the field back to their corporate VP/Director.</li> </ul>	<b>Decision Drivers:</b> <ul style="list-style-type: none"> <li>(Branded-Oil Chains) – Keeping the supply contract and relationship in good standing</li> <li>Up-front price and immediate energy savings</li> <li>Peace of mind <ul style="list-style-type: none"> <li>Influencer recommendation: Long-standing A&amp;E Firm, Strong Agent or Distributor relationship</li> <li>Supplier reputation/relationship/prior experience</li> <li>Reliability, Warranty</li> </ul> </li> <li>Longer-term maintenance and operational savings</li> <li>Brand appearance and consumer loyalty <ul style="list-style-type: none"> <li>Competitive edge with better format as well as longer-range roadway visibility (brightness, optics); "Copy Cats"</li> <li>Better customer experience (cleanliness, safety, comfort, color) to grow in-store &amp; forecourt sales</li> </ul> </li> <li>Legal avoidance with improved visibility (accident/theft avoidance)</li> <li>(Controls Buyer) Easy, flexible, scalable controls for nation-wide code compliance (incl. Title-24) and streamlined install across entire footprint</li> </ul>		
<b>BEHAVIORAL</b>	<b>Content Asset Types:</b> <ul style="list-style-type: none"> <li>RFP bids/proposal packages <ul style="list-style-type: none"> <li>Project schedules</li> <li>Required product specs</li> <li>Cost estimates</li> </ul> </li> <li>Sales presentations</li> <li>Supplier website</li> <li>Product info and spec sheets</li> <li>Product certifications and reliability data</li> <li>Marketing materials</li> <li>Customer testimonials/case studies</li> </ul>	<b>Interaction Types:</b> <p>Human Interactions:</p> <ul style="list-style-type: none"> <li>In-person or virtual sales meetings</li> <li>Team conference calls</li> <li>Colleague word of mouth</li> <li>Site visits / Demo installations</li> <li>Conferences</li> </ul> <p>Non-Human Interactions:</p> <ul style="list-style-type: none"> <li>Researching industry trending topics online</li> <li>Reviewing supplier website &amp; materials</li> </ul>	<b>Watering Holes:</b> <ul style="list-style-type: none"> <li>Trade Associations &amp; Conferences: <ul style="list-style-type: none"> <li>NACS – Natl Assoc C-Stores</li> <li>APCA – American Petro &amp; CS Assoc</li> <li>PMAA – Petro Marketers of Amer Assoc</li> <li>Geo/Regional Associations</li> </ul> </li> <li>Trade Magazines: NACS, CS News, CSP Magazine, CS Decisions, PetrolPlaza</li> <li>Social: LinkedIn (Professional) / FB (Personal)</li> </ul>	

# Persona #3: Corporate Office Purchasing Manager



Hi, I'm Sue.

## FUNCTIONAL ATTRIBUTES

### Job Role:

Purchasing/Procurement

### Common Titles:

Purchasing or Sourcing Manager,  
Specialist or Agent, Buyer

### Position on Org Chart:

Reports to VP, Procurement

### Buying Center:

Finance or Operations/Supply Chain

### Firmographics:

National or Regional Chains  
MM/BB Private or Public Corps  
100-500+ US & Can locations

### Demographics:

50/50 male-female, white, 35-60yo, BS Business/Finance, strong-willed and tough negotiators, naturally skeptical

<b>EMOTIVE</b>	<b>Initiatives:</b> <ul style="list-style-type: none"> <li>Tasked with identifying, researching, and approving new suppliers for all company projects including store remodel and new construction bids.</li> <li>Typical day includes tracking supply shipments to ensure alignment with project schedules, vetting potential suppliers, researching products specified by the construction/design team, and maintaining all related documentation and certifications.</li> </ul>	<b>Challenges:</b> <ul style="list-style-type: none"> <li>If the products are of poor quality or do not arrive on time at the right locations, projects grind to a halt and/or business is disrupted.</li> <li>If a project runs over budget due to poor supplier selection, they cause the company to lose money.</li> </ul>	<b>Buyer Need:</b> <ul style="list-style-type: none"> <li>Assurance that the right products are sourced and purchased from reliable suppliers at the best price.</li> <li>Assurance that the correct products will arrive at the right job site on time and exactly as promised.</li> <li>Demonstrate their personal value to the company by finding savings, negotiating the best prices, and having the best supplier record.</li> </ul>	<b>Lexicon:</b> <ul style="list-style-type: none"> <li>TCO</li> <li>Reliability</li> <li>Supplier service metrics like OTD % and standard lead times</li> <li>Approved vendor list</li> <li>BOM</li> <li>Vendor Capabilities Review</li> </ul>
<b>DECISION PROCESS</b>	<b>Buyer Role:</b> <ul style="list-style-type: none"> <li>Professional ratifier / contract negotiator for new corporate supplier agreements.</li> <li>They place the P.O.</li> <li>Sole decision maker on established supplier repeat purchases.</li> </ul>	<b>Decision Drivers:</b> <ul style="list-style-type: none"> <li>Supplier reputation and prior experience are paramount. (Very loyal to existing suppliers) <ul style="list-style-type: none"> <li>Is the supplier already on the "approved vendor list"? They would much rather use an existing vendor to supply newly required products as this reduces the cost and the contract negotiations necessary to onboard a new vendor.</li> <li>The more a potential supplier can demonstrate their ability to step right into the supply chain that exists as a new or replacement resource, the more likely they are to make the "short list" for consideration.</li> </ul> </li> <li>Best negotiated price and related factors such as impact of shipping options, volume and other discounts, etc.</li> <li>Available shipping options to meet project schedules</li> <li>Overall quality of the products or services they're sourcing</li> </ul>		
<b>BEHAVIORAL</b>	<b>Content Asset Types:</b> <ul style="list-style-type: none"> <li>RFP bids/proposal packages <ul style="list-style-type: none"> <li>Project schedules</li> <li>Required product specs</li> <li>Cost estimates</li> </ul> </li> <li>Supplier website</li> <li>Product info and spec sheets</li> <li>Product certifications and reliability data</li> <li>Warranty and Terms &amp; Conditions</li> <li>Customer list/testimonials/case studies</li> <li>On-Hand Inventory Reports</li> </ul>	<b>Interaction Types:</b> <p>Human Interactions:</p> <ul style="list-style-type: none"> <li>Often lengthy negotiation calls and vendor capabilities reviews</li> <li>In-person or virtual account meetings</li> <li>Team conference calls</li> <li>Networking with professional peers</li> </ul> <p>Non-Human Interactions:</p> <ul style="list-style-type: none"> <li>Reviewing supplier history &amp; activity</li> <li>Reviewing supplier website &amp; materials</li> </ul>	<b>Watering Holes:</b> <ul style="list-style-type: none"> <li>Procurement Trade Associations &amp; Conferences: <ul style="list-style-type: none"> <li>ProcureCon, ISM, CIPS, APICS, APS</li> </ul> </li> <li>Petro Trade Associations &amp; Conferences: <ul style="list-style-type: none"> <li>NACS – Natl Assoc C-Stores</li> <li>APCA – American Petro &amp; CS Assoc</li> <li>PMAA – Petro Marketers of Amer Assoc</li> <li>Geo/Regional Associations</li> </ul> </li> <li>Social: LinkedIn (Professional) / FB or Twitter (Personal)</li> </ul>	

## Persona #4: Station Owner/Operator (Branded or Non-Branded/Independent)



Hi, I'm Malik.

### FUNCTIONAL ATTRIBUTES

#### Job Role/Title/Position:

Owner/Operator, GM, President

#### Buying Center:

Store Opex / Branded stores also receive brand image allowances

#### Firmographics:

Either independent (70%) or branded dealer (30%) of a big oil or CS company, Mostly just 1 location but some own up to 50 locations, Family-owned with strong nepotism/tribal relationships

#### Demographics:

Typically male, 35-60yo, Likely foreign immigrant (EMEA, Hispanic, Russian), Very price sensitive due to personally financially leveraged, Entrepreneurial, Community-oriented and (new) patriotic, Very conservative, Not as tech-savvy, Married, Large extended family

<b>EMOTIVE</b>	<b>Initiatives:</b> <ul style="list-style-type: none"> <li>In charge of all aspects of the business and physical footprint</li> <li>Maintain safe and profitable business while reducing costs where possible</li> <li>Beat competition and ideally expand footprint (locations, format)</li> <li>EMV regulations</li> <li>Dealers: Maintain brand/supply contracts, Attract top tier brands</li> </ul>	<b>Challenges:</b> <ul style="list-style-type: none"> <li>Cash pressure from COVID</li> <li>Cannot afford to lose money with business disruptions - Keeping projects fast-moving and on budget</li> <li>Staying ahead of the competition, very much a "copy cat" culture</li> <li>Dealing with customer complaints or bad ratings: Lights out, leaky canopies, dirty appearance</li> <li>Dealing with lighting issues (RMAs)</li> <li>High employee turnover (thus, family)</li> </ul>	<b>Buyer Need:</b> <ul style="list-style-type: none"> <li>Sees lighting as a cost, not necessarily a benefit, looking for cheapest solution with best value</li> <li>Make their job easier and minimize business disruption</li> <li>Dealers: Solutions that meet the brand spec requirements</li> <li>Independent Owners: Desire autonomy and flexibility in decision-making</li> <li>Need help with layouts (some have A&amp;E firm, some may rely on agent/manufacture)</li> </ul>	<b>Lexicon:</b> <ul style="list-style-type: none"> <li>Price, Cost</li> <li>Customer Service</li> <li>Warranty</li> <li>Reliability</li> <li>Product Lifetime</li> <li>Sparkle (nighttime brightness)</li> </ul>
<b>DECISION PROCESS</b>	<b>Buyer Role:</b> <ul style="list-style-type: none"> <li>Sole decision-maker for all aspects of the business. Some larger businesses hire a Maintenance Manager to delegate some of the day-to-day maintenance work to.</li> </ul>	<b>Decision Drivers:</b> <ul style="list-style-type: none"> <li>(Dealers) Keeping the brand/supply contract and relationship in good standing – Why? A branded contract helps with consumer recognition/preference, guarantees fuel supply, especially when supplies are tight. Supply guarantees can also smooth out extreme price volatility seen in the wholesale gas markets. SEE NOTES for imaging requirements.</li> <li>Up-front price and immediate energy savings – Personally financially leveraged</li> <li>Peace of mind <ul style="list-style-type: none"> <li>Influencer recommendation: Peer and Family networks</li> <li>Supplier reputation/relationship/prior experience</li> <li>Reliability, Warranty</li> </ul> </li> <li>Longer-term maintenance and operational savings</li> <li>Competitive edge and consumer loyalty <ul style="list-style-type: none"> <li>More "sparkle" to attract nighttime customers, better in-store format, attract better tier brand (Franchisee)</li> <li>Better customer experience (cleanliness, safety, comfort, color) to avoid complaints and grow sales</li> </ul> </li> <li>Legal avoidance with improved visibility (accident/theft avoidance)</li> <li>Code compliance (permitted projects)</li> </ul>		
<b>BEHAVIORAL</b>	<b>Content Asset Types:</b> <ul style="list-style-type: none"> <li>Project quote/pricing</li> <li>Project schedule</li> <li>Product info and spec sheets</li> <li>Store application layouts (larger projects)</li> <li>Sales presentations</li> <li>Supplier website</li> <li>Marketing materials</li> <li>Customer testimonials/case studies</li> </ul>	<b>Interaction Types:</b> <p>Human Interactions:</p> <ul style="list-style-type: none"> <li>On-site sales meetings</li> <li>Peer/Family word of mouth/"Trunk" market</li> <li>Night rides / Site visits / Demo installs</li> <li>Distributor branch visits and customer appreciation or lunch &amp; learn events</li> <li>(Dealers) Dealer Conferences</li> </ul> <p>Non-Human Interactions:</p> <ul style="list-style-type: none"> <li>Price shopping online</li> <li>Reviewing supplier website</li> </ul>	<b>Watering Holes:</b> <ul style="list-style-type: none"> <li>Trusted peer/family network</li> <li>Trade Associations &amp; Conferences: <ul style="list-style-type: none"> <li>Nationality-Based Petro Associations</li> <li>Geo/Regional Associations</li> <li>NACS, APCA, PMAA</li> <li>(Dealers) Brand Associations</li> </ul> </li> <li>Trade Magazines: NACS, CS News, CSP Magazine, CS Decisions, PetrolPlaza</li> <li>Religious and foreign community affiliations (Muslim, Sikh, Hindu, Catholic, Russian Orthodox)</li> <li>Low social media adoption but growing</li> </ul>	

## Key Value Chain Personas



# Persona #1: A&E Firm Engineer or Lighting Specialist

Example Targets: Fiedler (CA), Dimension Group (TX)



Hi, I'm Alex.

## FUNCTIONAL ATTRIBUTES

### Job Role:

EE or Lighting Designer

### Common Titles:

"PE" Professional Engineer,  
or "LC" Lighting Certified

### Position on Org Chart:

Reports to a Project Lead

### Buying Center:

Client sets the overall project budget and Project Lead allocates his portion for lighting.

### Firmographics:

Design-Build Firm. Small to Medium size private business with long-standing relationship to corporate accounts

### Demographics:

Typically white male, 30-60yo, BS - EE or Design, very career-oriented, focus on professional certs/continuing ed, introvert, problem-solver

EMOTIVE	<b>Initiatives:</b> <ul style="list-style-type: none"><li>Develops the lighting spec (interior and exterior) as part of the overall store design</li><li>Performs all the technical product research and local code due diligence to ensure project meets all requirements and client objectives.</li></ul>	<b>Challenges:</b> <ul style="list-style-type: none"><li>Earn revenue for their firm through billable hours – so very particular about how they spend their time on a project to maximize hours while staying within client's budget.</li><li>Expected to be the expert on all things lighting as well as all related code compliance but may not always be up to date with the latest information.</li><li>Value engineering of their design</li></ul>	<b>Buyer Need:</b> <ul style="list-style-type: none"><li>Confidence in supplier and solutions to justify recommendation to their client</li><li>Make their job easier and faster by putting product and technical info, application and design aids at their fingertips</li><li>Lots of options to choose from</li><li>Inspiration and use cases to reference</li><li>Need to see the business value or ROI to support their recommendation</li></ul>	<b>Lexicon:</b> <ul style="list-style-type: none"><li>Billable hours</li><li>Lighting performance specs</li><li>IES/Application requirements</li><li>Electrical code requirements</li><li>Fit and form / Aesthetics</li><li>Price (fit with client budget)</li></ul>
DECISION PROCESS	<b>Buyer Role:</b> <ul style="list-style-type: none"><li>Key influencer for setting the national store spec (for corporate accounts)</li><li>Also brought in on smaller projects that require permitting (NC or remodel) to ensure code compliance</li></ul> <b>Level of Engagement:</b> <ul style="list-style-type: none"><li>Heavily involved in the up front due diligence researching solutions and making a recommendation in the form of a design or lighting spec.</li><li>Involved in commissioning controls</li></ul>	<b>Decision Drivers:</b> <ul style="list-style-type: none"><li>Enjoys the technical aspects of the design – Solutions and products that he's excited about</li><li>Will this design grow firm revenue by designing press-worthy properties that elevate reputation?</li><li>Legal Avoidance: Avoid mistakes that will damage the firm's reputation or even lead to a lawsuit (code compliance)</li><li>Tool and Support needed to deliver the best spec without excessive work hours</li><li>Confidence in their selection: Top-notch product quality, availability, delivery, customer service</li><li>Education opportunities (product training, demo, etc.) ensures firm as subject matter experts.</li></ul>		
BEHAVIORAL	<b>Content Asset Types:</b> <ul style="list-style-type: none"><li>RFP bids/proposal packages<ul style="list-style-type: none"><li>Store application layouts</li><li>Project schedules</li></ul></li><li>Sales presentations</li><li>Supplier website</li><li>Design/Application Guides &amp; Visual Aides</li><li>Product info and spec sheets</li><li>Design gallery / inspiration</li><li>Marketing materials</li><li>Blog/Whitepapers</li><li>Sample Kits</li></ul>	<b>Interaction Types:</b> Human Interactions: <ul style="list-style-type: none"><li>In-person or virtual client meetings</li><li>Team conference calls</li><li>Colleague word of mouth</li><li>Factory or Site visits</li><li>Demo installations</li></ul> Non-Human Interactions: <ul style="list-style-type: none"><li>Researching trending topics online</li><li>Reviewing supplier website</li><li>Continuing professional education</li></ul>	<b>Watering Holes:</b> <ul style="list-style-type: none"><li>Trade Associations &amp; Conferences:<ul style="list-style-type: none"><li>IEEE</li><li>IES</li><li>IALD</li><li>AIA</li></ul></li><li>Trade/Design Magazines: IEEE, LD+A, Architect</li><li>LinkedIn (Professional) / FB (Personal)</li></ul>	

## Persona #2: Canopy OEM Partner - VP or Director

Example Targets: McGee, Jimco Supply, Phillips Aluminum, Madison Industries



Hi, I'm Kevin.

### FUNCTIONAL ATTRIBUTES

#### Job Role:

Canopy manufacturer

#### Common Titles:

Owner or Principal,  
VP of Biz Dev or Operations

#### Position on Org Chart:

Owner or Reports to Owner

#### Buying Center:

Firm OPEX

#### Firmographics:

Small to Medium size private business, 4<sup>th</sup>/5<sup>th</sup> Gen, family-owned

#### Demographics:

Typically white male, 30-60yo, BS-Business or equiv. experience, married with kids, middle class, enjoys sports/golf

EMOTIVE	<b>Initiatives:</b> <ul style="list-style-type: none"> <li>Manufactures and supplies the fuel canopy (and other large specialized construction) to station owners and dealers within their geographic footprint</li> <li>Sometimes acts as an equipment distributor to those same customers (as a turnkey offer)</li> <li>Maintain customer relationships and grow business</li> </ul>	<b>Challenges:</b> <ul style="list-style-type: none"> <li>Cash pressure from COVID</li> <li>Keeping projects on time, on budget, code compliant</li> <li>Meeting the canopy design requirements of Big Oil/CS Chains</li> <li>Dealing with customer complaints or bad ratings due to leaky or defective canopies</li> <li>Dealing w/ product issues (RMAs)</li> <li>Pressure to stay relevant (latest design or construction trends).</li> </ul>	<b>Buyer Need:</b> <ul style="list-style-type: none"> <li>Confidence in supplier and solutions since its their reputation on the line</li> <li>Make their job easier and faster by putting product, technical, and application information at their fingertips</li> <li>Need to see the business value or ROI of partnering with a lighting manufacturer</li> </ul>	<b>Lexicon:</b> <ul style="list-style-type: none"> <li>Supplier service metrics like OTD % and standard lead times</li> <li>Product Quality/Reliability</li> <li>Customer Service</li> <li>Competitive advantage</li> <li>Upfront cost</li> <li>Warranty</li> <li>On-Hand Inventory</li> <li>Store or Brand Spec</li> </ul>
DECISION PROCESS	<b>Buyer Role:</b> <ul style="list-style-type: none"> <li>Sells and delivers lighting as part of the overall canopy solution. Responsible for post-sale support including installation and any RMA facilitation.</li> </ul>	<b>Decision Drivers:</b> <ul style="list-style-type: none"> <li>Profitable competitive edge                             <ul style="list-style-type: none"> <li>Best canopy solutions, pricing, service and brand reputation</li> <li>Added value (product or service) to attract customers – leading to revenue growth, thus selling lighting/turn key</li> <li>Product breadth to meet customer needs</li> </ul> </li> <li>Trusted Partnership with manufacturer for business stability                             <ul style="list-style-type: none"> <li>Top-notch product quality, availability, delivery, customer service and RMA process</li> <li>Dedicated customer service/sales team/AE</li> <li>Preferred pricing, incentives and impact of shipping options, volume and other discounts, etc.</li> <li>Education opportunities (product training, demo, etc.) since they are not lighting experts</li> </ul> </li> </ul>		
BEHAVIORAL	<b>Content Asset Types:</b> <ul style="list-style-type: none"> <li>Approved Store or Brand Spec Docs (Canopy)                             <ul style="list-style-type: none"> <li>Approved/Required product specs</li> <li>Application/Image requirements</li> </ul> </li> <li>RFP with Project schedules &amp; cost estimates</li> <li>Sales presentations</li> <li>Supplier website</li> <li>Product info and spec sheets</li> <li>Application &amp; Selection Guides</li> <li>Marketing materials</li> <li>Customer testimonials/case studies</li> </ul>	<b>Interaction Types:</b> <p>Human Interactions:</p> <ul style="list-style-type: none"> <li>In-person or virtual client meetings</li> <li>Team conference calls</li> <li>Colleague word of mouth</li> <li>Factory or Site visits</li> <li>Demo installations</li> </ul> <p>Non-Human Interactions:</p> <ul style="list-style-type: none"> <li>Researching trending topics online</li> <li>Reviewing supplier website</li> <li>Sample Kits</li> </ul>	<b>Watering Holes:</b> <ul style="list-style-type: none"> <li>Trade Associations &amp; Conferences:                             <ul style="list-style-type: none"> <li>PEI – Petroleum Equipment Institute</li> <li>NACS, APCA, PMAA</li> <li>Geo/Regional Associations</li> </ul> </li> <li>Construction Magazines</li> <li>Business Magazines: WSJ, Inc.</li> <li>Social: LinkedIn (Professional) / FB (Personal)</li> </ul>	

## Persona #3: Petroleum Distributor

*\*\*National/Regional chain distributors (Graybar, etc) are a very small portion of business overall but can have big impact on nat'l accounts.*



Hi, I'm John.

### FUNCTIONAL ATTRIBUTES

#### Job Role:

Distributor

#### Common Titles:

Principal, Sales Rep, Branch Managers, District Managers, Counter Sales

#### Position on Org Chart:

Reports to Principal, Agency

#### Buying Center:

Customer sets the overall project budget and distributor recommends product

#### Firmographics:

Small to Large size private business with long-standing relationships (the "local" guy), 2nd/3rd Gen, family-owned, mostly focus on project business.\*\*

#### Demographics:

Typically white male (few women), 35-55yo, High School Diploma to BS-Business

EMOTIVE	<b>Initiatives:</b> <ul style="list-style-type: none"> <li>Tasked with identifying and recommending solutions.</li> <li>Seeks opportunity for business growth and sales incentives.</li> <li>Educate customers on lighting solutions and guide them through the purchase.</li> <li>Builds and retain customer relationships.</li> <li>Few keep limited lighting stock in house</li> </ul>	<b>Challenges:</b> <ul style="list-style-type: none"> <li>Cash pressure from COVID</li> <li>Pressure to stay relevant (business, solutions, ecommerce threats).</li> <li>Keeping projects on time, on budget, code compliant</li> <li>Dealing w/ product issues (RMAs)</li> <li>Expected to be the expert on all things lighting as well as all related code compliance but may not always be up to date with the latest information, thus continuing ed is critical.</li> </ul>	<b>Buyer Need:</b> <ul style="list-style-type: none"> <li>Confidence in supplier &amp; solutions to justify their product recommendations</li> <li>Make their job easier and faster by putting product and technical information at their fingertips</li> <li>Need to see the business value and be treated like an important partner</li> <li>Need best service and support (e.g., easy RMA process)</li> <li>Make it easier to get repeat business (adding to or upgrading past projects)</li> </ul>	<b>Lexicon:</b> <ul style="list-style-type: none"> <li>Competitive advantage</li> <li>ROI</li> <li>Warranty</li> <li>Project Schedule</li> <li>OTD</li> <li>Stock and Flow</li> <li>Reliability</li> <li>Quality</li> <li>Customer Service</li> </ul>
DECISION PROCESS	<b>Buyer Role:</b> <ul style="list-style-type: none"> <li>Key influencer for product recommendation.</li> <li>Facilitates purchase transaction from taking the PO to delivering product and ensuring overall satisfaction.</li> </ul>	<b>Decision Drivers:</b> <ul style="list-style-type: none"> <li>Profitable competitive edge               <ul style="list-style-type: none"> <li>Added value (product or service) to attract customers – leading to revenue growth</li> <li>Product breadth to meet customer needs</li> </ul> </li> <li>Trusted Partnership with agency/manufacturer for business stability               <ul style="list-style-type: none"> <li>PDP/Loyalty Program Benefits: Preferred pricing, incentives, special shipping options (same location) and freight allowance terms, volume and other discounts, etc.,</li> <li>Top-notch product quality, availability, lead times/delivery, customer service, warranty and RMA process</li> <li>Education opportunities (product training, demo, etc.) ensures they are seen as subject matter experts.</li> <li>Dedicated customer service/sales team/AE</li> </ul> </li> <li>Customer loyalty and retention               <ul style="list-style-type: none"> <li>Better customer experience (OTD, reliable products, ease of doing business) to avoid complaints and grow sales</li> </ul> </li> <li>Legal Avoidance: Avoid mistakes that will damage the firm's reputation or even lead to a lawsuit (code compliance)</li> </ul>		
BEHAVIORAL	<b>Content Asset Types:</b> <ul style="list-style-type: none"> <li>RFP bids/proposal packages               <ul style="list-style-type: none"> <li>Store application layouts</li> <li>Project schedules</li> </ul> </li> <li>Sales presentations</li> <li>Supplier website</li> <li>Design/Application Guides &amp; Visual Aides</li> <li>Product info and spec sheets</li> <li>Design gallery / inspiration</li> <li>Marketing materials</li> <li>Blogs / Whitepapers</li> </ul>	<b>Interaction Types:</b> <p>Human Interactions:</p> <ul style="list-style-type: none"> <li>In-person or virtual client meetings</li> <li>Team conference calls</li> <li>Colleague word of mouth</li> <li>Factory or Site visits</li> <li>Demo installations</li> </ul> <p>Non-Human Interactions:</p> <ul style="list-style-type: none"> <li>Researching trending topics online</li> <li>Reviewing supplier website</li> <li>Sample Kits</li> </ul>	<b>Watering Holes:</b> <ul style="list-style-type: none"> <li>Trade Associations &amp; Conferences:               <ul style="list-style-type: none"> <li>NACS – Nat'l Assoc C-Stores</li> <li>APCA – American Petro &amp; CS Assoc</li> <li>PMAA – Petro Marketers of Amer Assoc</li> <li>Geo/Regional Associations</li> </ul> </li> <li>Trade Magazines: NACS, CS News, CSP Magazine, CS Decisions, PetrolPlaza</li> <li>Business Magazines: WSJ, Inc.</li> <li>Social: LinkedIn (Professional) / FB (Personal)</li> </ul>	

# Persona #4: Petroleum Wholesaler

Example Targets: US Oil, Petroleum Wholesale, Atlantis Mngmt Group



Hi, I'm Jerry.

## FUNCTIONAL ATTRIBUTES

### Job Role:

Fuel wholesaler

### Common Titles:

Owner or Principal,  
VP of Biz Dev or Operations

### Position on Org Chart:

Owner or Reports to Owner

### Buying Center:

Firm OPEX

### Firmographics

Regional-based, private small to medium size business that's big enough to have negotiated supply deals directly with Big Oil. Some own their own stores as well.

### Demographics:

Typically white male, 30-60yo, BS-Business, married, middle class, entrepreneurial, good negotiator, enjoys sports/golf

<b>EMOTIVE</b>	<b>Initiatives:</b> <ul style="list-style-type: none"> <li>Typically supplies 50+ branded dealer stores plus own 10 stores of their own (some are much larger).</li> <li>Sometimes acts as an equipment distributor to those same dealers</li> <li>Some want to grow footprint (add dealers and/or stores)</li> <li>EMV regulations</li> </ul>	<b>Challenges:</b> <ul style="list-style-type: none"> <li>Cash pressure from COVID</li> <li>Managing multiple brand contracts at the same time</li> <li>Upgrade requirements can catch them by surprise and may need money to support (Ex: Exxon "Synergy" Program)</li> <li>Negotiating the best brand/supply deals (locked-in for 10+ years)</li> <li>Attracting and retaining new dealers can be costly</li> <li>Dealing w/ supplier issues (RMAs)</li> <li>Same challenge as store owners</li> </ul>	<b>Buyer Need:</b> <ul style="list-style-type: none"> <li>The best deals possible from suppliers. Desires to buy lighting more direct to cut out petroleum distributor margin (more savings for them).</li> <li>Solutions that meet the brand spec requirements</li> <li>Trusted partnership with suppliers for business stability</li> </ul>	<b>Lexicon:</b> <ul style="list-style-type: none"> <li>Brand/Supply Contract</li> <li>Competitive advantage</li> <li>Upfront cost</li> <li>Customer Service</li> <li>OTD</li> <li>Warranty</li> <li>Quality</li> <li>On-Hand Inventory</li> </ul>
<b>DECISION PROCESS</b>	<b>Buyer Role:</b> <ul style="list-style-type: none"> <li>Intermediary between big oil and branded dealers.</li> <li>Will offer brand image related upgrades, like lighting, to sweeten deal to onboard new dealers</li> </ul>	<b>Decision Drivers:</b> <ul style="list-style-type: none"> <li>Keeping the brand/supply contract and relationship with Big Oil brands in good standing. Requirements varies by oil. <ul style="list-style-type: none"> <li>Often have agreements with multiple brands at once and can pit them against each other to get the best deal.</li> <li>Brand consistency / good reputation across entire footprint</li> </ul> </li> <li>Profitable competitive edge <ul style="list-style-type: none"> <li>Best fuel pricing and best brand relationships (use relationship as a selling point to attract dealers)</li> <li>Added value (product or service) to attract customers – leading to revenue growth, thus selling lighting/turn key</li> <li>Product breadth to meet customer needs</li> </ul> </li> <li>Trusted Partnership with manufacturer for business stability <ul style="list-style-type: none"> <li>Top-notch product quality, availability, delivery, customer service and RMA process</li> <li>Dedicated customer service/sales team/AE</li> <li>Preferred pricing, incentives and impact of shipping options, volume and other discounts, etc.</li> <li>Education opportunities (product training, demo, etc.) since they are not lighting experts</li> </ul> </li> <li>For the stores they own, similar decision drivers as the Corporate Office VP/Director</li> </ul>		
<b>BEHAVIORAL</b>	<b>Content Asset Types:</b> <ul style="list-style-type: none"> <li>Approved Store Spec Documents <ul style="list-style-type: none"> <li>Approved/Required product specs</li> <li>Application/Image requirements</li> </ul> </li> <li>RFP with Project schedules &amp; cost estimates</li> <li>Sales presentations</li> <li>Supplier website</li> <li>Product info and spec sheets</li> <li>Application &amp; Selection Guides</li> <li>Marketing materials</li> <li>Customer testimonials/case studies</li> </ul>	<b>Interaction Types:</b> <p>Human Interactions:</p> <ul style="list-style-type: none"> <li>In-person or virtual client meetings</li> <li>Team conference calls</li> <li>Colleague word of mouth</li> <li>Factory or Site visits</li> <li>Demo installations</li> <li>Big Oil Dealer Conferences</li> </ul> <p>Non-Human Interactions:</p> <ul style="list-style-type: none"> <li>Researching trending topics online</li> <li>Reviewing supplier website</li> </ul>	<b>Watering Holes:</b> <ul style="list-style-type: none"> <li>Trade Associations &amp; Conferences: <ul style="list-style-type: none"> <li>PEI – Petroleum Equipment Institute</li> <li>NACS, APCA, PMAA</li> <li>Geo/Regional Associations</li> <li>Big Oil Dealer Associations</li> </ul> </li> <li><a href="https://www.opisnet.com/">https://www.opisnet.com/</a> - OPIS is the go-to market research source for global fuel pricing</li> <li>Business Magazines: WSJ, Inc.</li> <li>Social: LinkedIn (Professional) / FB (Personal)</li> </ul>	

# Persona #5: Petroleum Agent



Hi, I'm Anthony.

## FUNCTIONAL ATTRIBUTES

### Job Role:

Sales Agent

### Common Titles:

Principal, Sales Rep,  
Manufacturer's Rep

### Position on Org Chart:

Reports to Principal, Manufacturer

### Buying Center:

Customer sets the overall project budget and agent submits orders on their behalf.

### Firmographics:

Agency. Small to Medium size private business with long-standing relationship to distributors and customer base.

### Demographics:

Typically white male (few women), 35-60yo, High School Diploma to BS – Business Admin, 4<sup>th</sup>/5<sup>th</sup> Gen, family-owned, focus on project business.

<b>EMOTIVE</b>	<b>Initiatives:</b> <ul style="list-style-type: none"> <li>Tasked with identifying, researching, and approving manufacturers to represent.</li> <li>Seeks opportunity for business growth and sales commission.</li> <li>Educate distributors/customers on lighting solutions and guide them through the purchase.</li> <li>Recruit distributors for PDP program</li> <li>Build &amp; retain customer relationships.</li> </ul>	<b>Challenges:</b> <ul style="list-style-type: none"> <li>Pressure to stay relevant (business, solutions).</li> <li>Keeping projects on time, on budget, code compliant</li> <li>Dealing w/ product issues (RMAs)</li> <li>Expected to be the expert on all things lighting as well as all related code compliance but may not always be up to date with the latest information, thus continuing ed is critical.</li> </ul>	<b>Buyer Need:</b> <ul style="list-style-type: none"> <li>Confidence in supplier and solutions to justify recommendation to their client</li> <li>Make their job easier and faster by putting product and technical information at their fingertips</li> <li>Need to see the business value or ROI of premium solutions to support their recommendation</li> <li>Relies on channel partners (distributors) to bring in project business</li> </ul>	<b>Lexicon:</b> <ul style="list-style-type: none"> <li>Business value</li> <li>Competitive advantage</li> <li>ROI</li> <li>Warranty</li> <li>Project Schedule</li> <li>OTD</li> <li>Reliability</li> <li>Quality</li> <li>Customer Service</li> </ul>
<b>DECISION PROCESS</b>	<b>Buyer Role:</b> <ul style="list-style-type: none"> <li>Champions channels and customers through the buyer's journey from product recommendations to installation and overall satisfaction.</li> </ul>	<b>Decision Drivers:</b> <ul style="list-style-type: none"> <li>Profitable competitive edge <ul style="list-style-type: none"> <li>Added value (product or service) to attract customers – leading to revenue growth</li> <li>Product breadth to meet customer needs</li> </ul> </li> <li>Best price/commission and related factors such as impact of shipping options, volume and other discounts, etc.</li> <li>Trusted Partnership with manufacturer for business stability <ul style="list-style-type: none"> <li>Top-notch product quality, availability, delivery, customer service and RMA process</li> <li>Education opportunities (product training, demo, etc.) ensures agency as subject matter experts.</li> </ul> </li> <li>Customer loyalty and retention <ul style="list-style-type: none"> <li>Better customer experience (OTD, reliable products, ease of doing business) to avoid complaints and grow sales</li> </ul> </li> </ul>		
<b>BEHAVIORAL</b>	<b>Content Asset Types:</b> <ul style="list-style-type: none"> <li>RFP bids/proposal packages <ul style="list-style-type: none"> <li>Store application layouts</li> <li>Project schedules</li> </ul> </li> <li>Sales presentations</li> <li>Supplier website</li> <li>Design/Application Guides &amp; Visual Aides</li> <li>Product info and spec sheets</li> <li>Design gallery / inspiration</li> <li>Marketing materials</li> <li>Blogs / Whitepapers</li> </ul>	<b>Interaction Types:</b> <p>Human Interactions:</p> <ul style="list-style-type: none"> <li>In-person or virtual client meetings</li> <li>Team conference calls</li> <li>Colleague word of mouth</li> <li>Factory or Site visits</li> <li>Relationship builders (e.g. dinners, golf)</li> </ul> <p>Non-Human Interactions:</p> <ul style="list-style-type: none"> <li>Researching trending topics online</li> <li>Reviewing supplier website</li> <li>Sample Kits</li> </ul>	<b>Watering Holes:</b> <ul style="list-style-type: none"> <li>Trade Associations &amp; Conferences: <ul style="list-style-type: none"> <li>NACS – Natl Assoc C-Stores</li> <li>APCA – American Petro &amp; CS Assoc</li> <li>PMAA – Petro Marketers of Amer Assoc</li> <li>Geo/Regional Associations</li> </ul> </li> <li>Trade Magazines: NACS, CS News, CSP Magazine, CS Decisions, PetrolPlaza</li> <li>Lighting Magazines: LD+A, EdisonReport, Inside Lighting, NEMRA</li> <li>Business Magazines: WSJ, Inc.</li> <li>Social: LinkedIn (Professional) / FB (Personal)</li> </ul>	

# Buyer Journeys

# Corporate-Level Buyer Journey

**ROLE**  
**R** - Person responsible for the task  
**A** - Person accountable for the task  
**C** - Consulted  
**I** - Kept informed

**IMPORTANCE**  
**P** - Primary/Important/Does Often  
**S** - Secondary/Somewhat  
 Important/Does Sometimes  
**T** - Tertiary/Not as Important/Does Rarely

Journey Stages	Specific Activities & Interactions	National/Regional Chain (corp. account)				Branded Wholesaler (corp. account)				Big Oil (corp. account)	
		Purchasing Manager	A&E Firm LTG Spec	VP/Dir Construction	VP/Dir Maintenance	Purchasing Manager	VP/Dir Construction	VP/Dir Maintenance	A&E Firm	VP/Dir, Brand Image	Lighting Specialist
<b>Awareness</b>	Conducts online research	C/S		I/T	I/T	C/S	I/T	I/T	A/S	C/S	R/P
<i>Researching Options</i>	Engages with marketing efforts (ex. clicks ads)	C/S				C/S			A/S	C/S	R/P
	Asks peers for advice	C/S		C/S	C/S	C/S	C/S	C/S	I/T	C/S	R/P
	Attends conferences	C/S		R/S	R/S	C/S	R/S	R/S	A/S	R/P	R/P
	Reviews trade pubs/materials	I/T			I/T	I/T		I/T	A/S	R/P	R/P
	Downloads website content	I/T			I/T	I/T		I/T	A/S	C/S	R/P
	Attends Product Launch Webinars				C/S			C/S	A/S	I/T	R/P
	Exposed to point of purchase material										
<b>Consideration</b>	Requests product info	C/S		A/S	C/S	C/S	A/S	C/S	A/S	A/S	R/P
<i>Getting educated on products/services and benefits</i>	Requests pricing	R/P		A/S	A/S	R/P	A/S	A/S	A/S	A/S	R/P
	Conducts needs assessment	I/T		A/P	R/P	I/T	A/P	R/P	I/T	R/P	A/P
	Sees sales presentation	C/S		R/P	C/S	C/S	R/P	C/S	A/S	R/P	A/S
	Shops competitor options	A/S		C/S	C/S	A/S	C/S	C/S	A/S	C/S	R/P
	Shops pricing	R/P		C/S	C/S	R/P	C/S	C/S		I/T	R/P
	Requests agreement	R/P		C/S	A/P	R/P	C/S	A/P		A/S	R/P
	Exposed to point of purchase material										
	Requests photometric plan		R/P								
	Requests custom layout (Agent or Manufacturer)										
	Attend a manufacturer site or local installation visit										
	Attends a relationship-building activity	R/P		R/P	R/P	R/P	R/P	R/P		R/P	

# Corporate-Level Buyer Journey (cont.)

## ROLE

R - Person responsible for the task  
A - Person accountable for the task  
C - Consulted  
I - Kept informed

## IMPORTANCE

P - Primary/Important/Does Often  
S - Secondary/Somewhat  
Important/Does Sometimes  
T - Tertiary/Not as Important/Does Rarely

Journey Stages	Specific Activities & Interactions	National/Regional Chain (corp. account)				Branded Wholesaler (corp. account)				Big Oil (corp. account)	
		Purchasing Manager	A&E Firm LTG Spec	VP/Dir Construction	VP/Dir Maintenance	Purchasing Manager	VP/Dir Construction	VP/Dir Maintenance	A&E Firm	VP/Dir, Brand Image	Lighting Specialist
<b>Convert</b>	Signs agreement	A/P			C/S	A/P		C/S			C/S
<i>Confirming the partnership</i>	Undergoes training				S			S		I/T	R/P
	Accesses new relationship/account	C/S			I/T	C/S		I/T		R/P	R/P
	Initiates trial/test/demo	C/T		R/P	A/S	C/T	R/P	A/S			R/P
	Makes payment	R/P				R/P					
	Attends a relationship-building activity	R/P		R/P	R/P	R/P	R/P	R/P		R/P	
<b>Loyalty</b>	Schedules a relationship/account review	C/S		R/P	C/T	C/S	R/P	C/T	A/P	R/P	R/P
<i>Continuing to use products/ services and request support</i>	Contacts Customer Support	I/T			I/T	I/T		I/T			
	Makes an account change request	C/T		C/S	A/P	C/T	C/S	A/P	C/S	A/S	A/S
	Participates in loyalty/reward program										
	Engages with ongoing marketing or training (reads website, attends webinars)			I	I		I	I	I/T	I/T	R/P
	Attends a relationship-building activity	R/P		R/P	R/P	R/P	R/P	R/P		R/P	
	Initiates a RMA	I/P		I/P	I/P	I/P	I/P	I/P		I/P	I/P
	Participates in PDP enrollment										
	Receiving shipments experience	R/P		I/S	I/S	R/P	I/S	I/S			
<b>Advocacy</b>	Completes customer survey									R/S	A/S
<i>Recommending service to colleagues</i>	Rates service				A/P			A/P			
	Provides testimonial or referral to peer			C/S	C/S		C/S	C/S		R/P	R/P



# Local-Level Buyer Journey

## ROLE

R - Person responsible for the task

A - Person accountable for the task

C - Consulted

I - Kept informed

## IMPORTANCE

P - Primary/Important/Does Often

S - Secondary/Somewhat

Important/Does Sometimes

T - Tertiary/Not as Important/Does

Rarely

Journey Stages	Specific Activities & Interactions	Indy Operator		Dealer/Franchiser (local customer)		
		Owner	A&E Firm	Owner	A&E Firm	Maintenance Mngr
<b>Awareness</b>	Conducts online research	R/P	A/S	C/P	A/S	
<i>Researching Options</i>	Engages with marketing efforts (ex. clicks ads)	R/P	A/S	C/S	A/S	
	Asks peers for advice	R/P	I/T	C/S	I/T	C/S
	Attends conferences	R/P	A/S	R/S	A/S	C/T
	Reviews trade pubs/materials	R/P	A/S	R/S	A/S	
	Downloads website content	R/P	A/S	T	A/S	
	Attends Product Launch Webinars	R/P	A/S	C/T	A/S	C/S
	Exposed to point of purchase material					
<b>Consideration</b>	Requests product info	R/P	A/S	A/S	A/S	C/S
<i>Getting educated on products/services and benefits</i>	Requests pricing	R/P	A/S	R/P	A/S	C/S
	Conducts needs assessment	R/P	I/T	A/S	I/T	C/S
	Sees sales presentation	R/P	A/S	A/S	A/S	
	Shops competitor options	R/P	A/S	A/S	A/S	C/S
	Shops pricing	R/P		A/P		
	Requests agreement	R/P		R/P		
	Exposed to point of purchase material					
	Requests photometric plan		R/P		R/P	
	Requests custom layout (Agent or Manufacturer)		R/P		R/P	
	Attend a manufacturer site or local installation visit					
	Attends a relationship-building activity	R/T		R/S		R/S

# Local-Level Buyer Journey (cont.)

## ROLE

R - Person responsible for the task

A - Person accountable for the task

C - Consulted

I - Kept informed

## IMPORTANCE

P - Primary/Important/Does Often

S - Secondary/Somewhat

Important/Does Sometimes

T - Tertiary/Not as Important/Does

Rarely

Journey Stages	Specific Activities & Interactions	Indy Operator		Dealer/Franchiser (local customer)		
		Owner	A&E Firm	Owner	A&E Firm	Maintenance Mngr
<b>Convert</b>	Signs agreement	R/P		R/P		
<i>Confirming the partnership</i>	Undergoes training	R/P		C/T		C/S
	Accesses new relationship/account	R/P		R/P		
	Initiates trial/test/demo	R/P		A/S		
	Makes payment	R/P		A/P		
	Attends a relationship-building activity	R/T		R/S		R/S
<b>Loyalty</b>	Schedules a relationship/account review	R/P	A/P	C/S	A/P	
<i>Continuing to use products/services and request support</i>	Contacts Customer Support	R/P		I/T		C/S
	Makes an account change request	R/P	C/S	C/T	C/S	
	Participates in loyalty/reward program	R/P		R/P		
	Engages with ongoing marketing or training (reads	R/P	I/T	I/T	I/T	
	Attends a relationship-building activity	R/T		R/S		R/S
	Initiates a RMA	I/P		I/P		I/P
	Participates in PDP enrollment					
	Receiving shipments experience	R/P		R/P		R/P (RMA)
<b>Advocacy</b>	Completes customer survey	R/P				
<i>Recommending service to colleagues</i>	Rates service	R/P		S		
	Provides testimonial or referral to peer	R/P		R		

# Value Chain Buyer Journey

## ROLE

R - Person responsible for the task

A - Person accountable for the task

C - Consulted

I - Kept informed

## IMPORTANCE

P - Primary/Important/Does Often

S - Secondary/Somewhat

Important/Does Sometimes

T - Tertiary/Not as Important/Does Rarely

Journey Stages	Specific Activities & Interactions	Petro Distributor		Petro Agent
		Principal	Sales Team	""
<b>Awareness</b>	Conducts online research	C/P	R/P	R/P
<i>Researching Options</i>	Engages with marketing efforts (ex. clicks ads)	C/P	R/P	R/P
	Asks peers for advice	C/P	R/P	R/P
	Attends conferences	R/P	R/P	R/P
	Reviews trade pubs/materials	R/S	R/P	R/P
	Downloads website content	C/P	R/P	R/P
	Attends Product Launch Webinars	C/P	R/P	R/P
	Exposed to point of purchase material			
<b>Consideration</b>	Requests product info	C/S	R/P	R/P
<i>Getting educated on products/services and benefits</i>	Requests pricing	C/S	R/P	R/P
	Conducts needs assessment	R/P	A/P	R/P
	Sees sales presentation	R/P	R/P	R/P
	Shops competitor options	C/S	R/P	R/P
	Shops pricing	C/S	R/P	R/P
	Requests agreement	R/P	A/P	R/P
	Exposed to point of purchase material			
	Requests photometric plan			
	Requests custom layout (Agent or Manufacturer)			
	Attend a manufacturer site or local installation visit			
	Attends a relationship-building activity	R/S	R/S	R/P

# Value Chain Buyer Journey (cont.)

## ROLE

R - Person responsible for the task

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## IMPORTANCE

P - Primary/Important/Does Often

S - Secondary/Somewhat

Important/Does Sometimes

T - Tertiary/Not as Important/Does Rarely

Journey Stages	Specific Activities & Interactions	Petro Distributor		Petro Agent
		Principal	Sales Team	""
<b>Convert</b>	Signs agreement	R/P		R/P
<i>Confirming the partnership</i>	Undergoes training	C/S	R/P	R/P
	Accesses new relationship/account	R/P	A/P	R/P
	Initiates trial/test/demo	C/S	R/P	R/P
	Makes payment	R/P		
	Attends a relationship-building activity	R/S	R/S	R/P
<b>Loyalty</b>	Schedules a relationship/account review	R/P	R/P	R/P
<i>Continuing to use products/ services and request support</i>	Contacts Customer Support	I/T	A/P	R/P
	Makes an account change request	R/P	A/P	R/P
	Participates in loyalty/reward program	R/P	C/S	R/P
	Engages with ongoing marketing or training (reads website, attends webinars)	C/S	A/S	R/P
	Attends a relationship-building activity	R/S	R/S	R/P
	Initiates a RMA	R/S	R/S	R/S
	Participates in PDP enrollment	R/P	R/P	I/S
	Receiving shipments experience	I/S	R/P	R/P
<b>Advocacy</b>	Completes customer survey	A/S	R/P	R/P
<i>Recommending service to colleagues</i>	Rates service	R/P	R/P	R/P
	Provides testimonial or referral to peer	I/T	R/P	R/P