



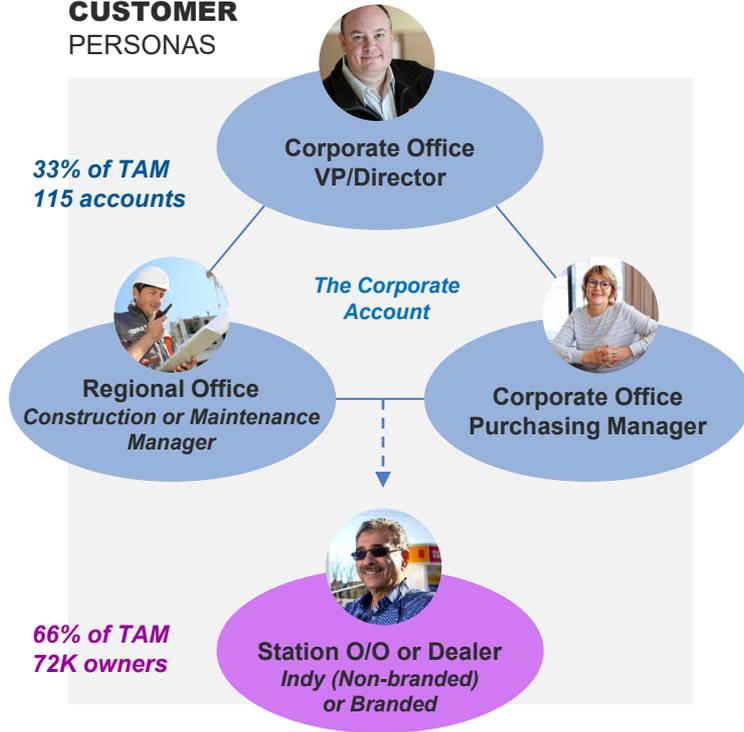
CREE LIGHTING

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

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

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

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

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

EMOTIVE	<p>Initiatives:</p> <ul style="list-style-type: none"> Tasked with identifying, researching, and approving new suppliers for all company projects including store remodel and new construction bids. 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. 	<p>Challenges:</p> <ul style="list-style-type: none"> 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. If a project runs over budget due to poor supplier selection, they cause the company to lose money. 	<p>Buyer Need:</p> <ul style="list-style-type: none"> Assurance that the right products are sourced and purchased from reliable suppliers at the best price. Assurance that the correct products will arrive at the right job site on time and exactly as promised. Demonstrate their personal value to the company by finding savings, negotiating the best prices, and having the best supplier record. 	<p>Lexicon:</p> <ul style="list-style-type: none"> TCO Reliability Supplier service metrics like OTD % and standard lead times Approved vendor list BOM Vendor Capabilities Review
DECISION PROCESS	<p>Buyer Role:</p> <ul style="list-style-type: none"> Professional ratifier / contract negotiator for new corporate supplier agreements. They place the P.O. Sole decision maker on established supplier repeat purchases. 	<p>Decision Drivers:</p> <ul style="list-style-type: none"> Supplier reputation and prior experience are paramount. (Very loyal to existing suppliers) <ul style="list-style-type: none"> 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. 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. Best negotiated price and related factors such as impact of shipping options, volume and other discounts, etc. Available shipping options to meet project schedules Overall quality of the products or services they're sourcing 		
BEHAVIORAL	<p>Level of Engagement:</p> <ul style="list-style-type: none"> Owens the upfront new supplier due diligence and vetting required during the construction spec RFP process as well as pricing and service negotiations. 	<p>Content Asset Types:</p> <ul style="list-style-type: none"> RFP bids/proposal packages <ul style="list-style-type: none"> Project schedules Required product specs Cost estimates Supplier website Product info and spec sheets Product certifications and reliability data Warranty and Terms & Conditions Customer list/testimonials/case studies On-Hand Inventory Reports 	<p>Interaction Types:</p> <p>Human Interactions:</p> <ul style="list-style-type: none"> Often lengthy negotiation calls and vendor capabilities reviews In-person or virtual account meetings Team conference calls Networking with professional peers <p>Non-Human Interactions:</p> <ul style="list-style-type: none"> Reviewing supplier history & activity Reviewing supplier website & materials 	<p>Watering Holes:</p> <ul style="list-style-type: none"> Procurement Trade Associations & Conferences: <ul style="list-style-type: none"> ProcureCon, ISM, CIPS, APICS, APS Petro Trade Associations & Conferences: <ul style="list-style-type: none"> NACS – Natl Assoc C-Stores APCA – American Petro & CS Assoc PMAA – Petro Marketers of Amer Assoc Geo/Regional Associations Social: LinkedIn (Professional) / FB or Twitter (Personal)

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

EMOTIVE	<p>Initiatives:</p> <ul style="list-style-type: none"> In charge of all aspects of the business and physical footprint Maintain safe and profitable business while reducing costs where possible Beat competition and ideally expand footprint (locations, format) EMV regulations Dealers: Maintain brand/supply contracts, Attract top tier brands 	<p>Challenges:</p> <ul style="list-style-type: none"> Cash pressure from COVID Cannot afford to lose money with business disruptions - Keeping projects fast-moving and on budget Staying ahead of the competition, very much a "copy cat" culture Dealing with customer complaints or bad ratings: Lights out, leaky canopies, dirty appearance Dealing with lighting issues (RMAs) High employee turnover (thus, family) 	<p>Buyer Need:</p> <ul style="list-style-type: none"> Sees lighting as a cost, not necessarily a benefit, looking for cheapest solution with best value Make their job easier and minimize business disruption Dealers: Solutions that meet the brand spec requirements Independent Owners: Desire autonomy and flexibility in decision-making Need help with layouts (some have A&E firm, some may rely on agent/manufacturer) 	<p>Lexicon:</p> <ul style="list-style-type: none"> Price, Cost Customer Service Warranty Reliability Product Lifetime Sparkle (nighttime brightness)
	DECISION PROCESS	<p>Buyer Role:</p> <ul style="list-style-type: none"> 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. 	<p>Decision Drivers:</p> <ul style="list-style-type: none"> (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. Up-front price and immediate energy savings – Personally financially leveraged Peace of mind <ul style="list-style-type: none"> Influencer recommendation: Peer and Family networks Supplier reputation/relationship/prior experience Reliability, Warranty Longer-term maintenance and operational savings Competitive edge and consumer loyalty <ul style="list-style-type: none"> More "sparkle" to attract nighttime customers, better in-store format, attract better tier brand (Franchisee) Better customer experience (cleanliness, safety, comfort, color) to avoid complaints and grow sales Legal avoidance with improved visibility (accident/theft avoidance) Code compliance (permitted projects) 	
<p>Level of Engagement:</p> <ul style="list-style-type: none"> Personally involved at every stage from education to solution review and selection. May delegate decision to Maintenance Manager but will still want the final approval. 		BEHAVIORAL	<p>Content Asset Types:</p> <ul style="list-style-type: none"> Project quote/pricing Project schedule Product info and spec sheets Store application layouts (larger projects) Sales presentations Supplier website Marketing materials Customer testimonials/case studies 	<p>Interaction Types:</p> <p>Human Interactions:</p> <ul style="list-style-type: none"> On-site sales meetings Peer/Family word of mouth/"Trunk" market Night rides / Site visits / Demo installs Distributor branch visits and customer appreciation or lunch & learn events (Dealers) Dealer Conferences <p>Non-Human Interactions:</p> <ul style="list-style-type: none"> Price shopping online Reviewing supplier website

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	Initiatives: <ul style="list-style-type: none"> Develops the lighting spec (interior and exterior) as part of the overall store design Performs all the technical product research and local code due diligence to ensure project meets all requirements and client objectives. 	Challenges: <ul style="list-style-type: none"> 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. 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. Value engineering of their design 	Buyer Need: <ul style="list-style-type: none"> Confidence in supplier and solutions to justify recommendation to their client Make their job easier and faster by putting product and technical info, application and design aids at their fingertips Lots of options to choose from Inspiration and use cases to reference Need to see the business value or ROI to support their recommendation 	Lexicon: <ul style="list-style-type: none"> Billable hours Lighting performance specs IES/Application requirements Electrical code requirements Fit and form / Aesthetics Price (fit with client budget)
	Buyer Role: <ul style="list-style-type: none"> Key influencer for setting the national store spec (for corporate accounts) Also brought in on smaller projects that require permitting (NC or remodel) to ensure code compliance 	Decision Drivers: <ul style="list-style-type: none"> Enjoys the technical aspects of the design – Solutions and products that he's excited about Will this design grow firm revenue by designing press-worthy properties that elevate reputation? Legal Avoidance: Avoid mistakes that will damage the firm's reputation or even lead to a lawsuit (code compliance) Tool and Support needed to deliver the best spec without excessive work hours Confidence in their selection: Top-notch product quality, availability, delivery, customer service Education opportunities (product training, demo, etc.) ensures firm as subject matter experts. 		
DECISION PROCESS	Level of Engagement: <ul style="list-style-type: none"> Heavily involved in the up front due diligence researching solutions and making a recommendation in the form of a design or lighting spec. Involved in commissioning controls 			
	Content Asset Types: <ul style="list-style-type: none"> RFP bids/proposal packages <ul style="list-style-type: none"> Store application layouts Project schedules Sales presentations Supplier website Design/Application Guides & Visual Aides Product info and spec sheets Design gallery / inspiration Marketing materials Blog/Whitepapers Sample Kits 	Interaction Types: <p>Human Interactions:</p> <ul style="list-style-type: none"> In-person or virtual client meetings Team conference calls Colleague word of mouth Factory or Site visits Demo installations <p>Non-Human Interactions:</p> <ul style="list-style-type: none"> Researching trending topics online Reviewing supplier website Continuing professional education 	Watering Holes: <ul style="list-style-type: none"> Trade Associations & Conferences: <ul style="list-style-type: none"> IEEE IES IALD AIA Trade/Design Magazines: IEEE, LD+A, Architect LinkedIn (Professional) / FB (Personal) 	
BEHAVIORAL				

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, 4th/5th Gen, family-owned

Demographics:

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

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

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	<p>Initiatives:</p> <ul style="list-style-type: none"> Tasked with identifying and recommending solutions. Seeks opportunity for business growth and sales incentives. Educate customers on lighting solutions and guide them through the purchase. Builds and retain customer relationships. Few keep limited lighting stock in house 	<p>Challenges:</p> <ul style="list-style-type: none"> Cash pressure from COVID Pressure to stay relevant (business, solutions, ecommerce threats). Keeping projects on time, on budget, code compliant Dealing w/ product issues (RMAs) 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. 	<p>Buyer Need:</p> <ul style="list-style-type: none"> Confidence in supplier & solutions to justify their product recommendations Make their job easier and faster by putting product and technical information at their fingertips Need to see the business value and be treated like an important partner Need best service and support (e.g., easy RMA process) Make it easier to get repeat business (adding to or upgrading past projects) 	<p>Lexicon:</p> <ul style="list-style-type: none"> Competitive advantage ROI Warranty Project Schedule OTD Stock and Flow Reliability Quality Customer Service
	DECISION PROCESS	<p>Buyer Role:</p> <ul style="list-style-type: none"> Key influencer for product recommendation. Facilitates purchase transaction from taking the PO to delivering product and ensuring overall satisfaction. 	<p>Decision Drivers:</p> <ul style="list-style-type: none"> Profitable competitive edge <ul style="list-style-type: none"> Added value (product or service) to attract customers – leading to revenue growth Product breadth to meet customer needs Trusted Partnership with agency/manufacturer for business stability <ul style="list-style-type: none"> PDP/Loyalty Program Benefits: Preferred pricing, incentives, special shipping options (same location) and freight allowance terms, volume and other discounts, etc., Top-notch product quality, availability, lead times/delivery, customer service, warranty and RMA process Education opportunities (product training, demo, etc.) ensures they are seen as subject matter experts. Dedicated customer service/sales team/AE Customer loyalty and retention <ul style="list-style-type: none"> Better customer experience (OTD, reliable products, ease of doing business) to avoid complaints and grow sales Legal Avoidance: Avoid mistakes that will damage the firm's reputation or even lead to a lawsuit (code compliance) 	
<p>Level of Engagement:</p> <ul style="list-style-type: none"> Heavily involved in all buying phases: education, selection and solution – including post-sale implementation (ensuring OTD for installation and any RMA activity) 		BEHAVIORAL	<p>Content Asset Types:</p> <ul style="list-style-type: none"> RFP bids/proposal packages <ul style="list-style-type: none"> Store application layouts Project schedules Sales presentations Supplier website Design/Application Guides & Visual Aides Product info and spec sheets Design gallery / inspiration Marketing materials Blogs / Whitepapers 	<p>Interaction Types:</p> <p>Human Interactions:</p> <ul style="list-style-type: none"> In-person or virtual client meetings Team conference calls Colleague word of mouth Factory or Site visits Demo installations <p>Non-Human Interactions:</p> <ul style="list-style-type: none"> Researching trending topics online Reviewing supplier website Sample Kits

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

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

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, 4th/5th Gen, family-owned, focus on project business.

EMOTIVE	<p>Initiatives:</p> <ul style="list-style-type: none"> Tasked with identifying, researching, and approving manufacturers to represent. Seeks opportunity for business growth and sales commission. Educate distributors/customers on lighting solutions and guide them through the purchase. Recruit distributors for PDP program Build & retain customer relationships. 	<p>Challenges:</p> <ul style="list-style-type: none"> Pressure to stay relevant (business, solutions). Keeping projects on time, on budget, code compliant Dealing w/ product issues (RMAs) 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. 	<p>Buyer Need:</p> <ul style="list-style-type: none"> Confidence in supplier and solutions to justify recommendation to their client Make their job easier and faster by putting product and technical information at their fingertips Need to see the business value or ROI of premium solutions to support their recommendation Relies on channel partners (distributors) to bring in project business 	<p>Lexicon:</p> <ul style="list-style-type: none"> Business value Competitive advantage ROI Warranty Project Schedule OTD Reliability Quality Customer Service
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DECISION PROCESS	<p>Buyer Role:</p> <ul style="list-style-type: none"> Champions channels and customers through the buyer's journey from product recommendations to installation and overall satisfaction. 	<p>Decision Drivers:</p> <ul style="list-style-type: none"> Profitable competitive edge <ul style="list-style-type: none"> Added value (product or service) to attract customers – leading to revenue growth Product breadth to meet customer needs Best price/commission and related factors such as impact of shipping options, volume and other discounts, etc. Trusted Partnership with manufacturer for business stability <ul style="list-style-type: none"> Top-notch product quality, availability, delivery, customer service and RMA process Education opportunities (product training, demo, etc.) ensures agency as subject matter experts. Customer loyalty and retention <ul style="list-style-type: none"> Better customer experience (OTD, reliable products, ease of doing business) to avoid complaints and grow sales
	<p>Level of Engagement:</p> <ul style="list-style-type: none"> Heavily involved in all buying phases: education, selection and solution – including post-sale implementation (ensuring OTD for installation and any RMA activity) 	

BEHAVIORAL	<p>Content Asset Types:</p> <ul style="list-style-type: none"> RFP bids/proposal packages <ul style="list-style-type: none"> Store application layouts Project schedules Sales presentations Supplier website Design/Application Guides & Visual Aides Product info and spec sheets Design gallery / inspiration Marketing materials Blogs / Whitepapers 	<p>Interaction Types:</p> <p>Human Interactions:</p> <ul style="list-style-type: none"> In-person or virtual client meetings Team conference calls Colleague word of mouth Factory or Site visits Relationship builders (e.g. dinners, golf) <p>Non-Human Interactions:</p> <ul style="list-style-type: none"> Researching trending topics online Reviewing supplier website Sample Kits 	<p>Watering Holes:</p> <ul style="list-style-type: none"> Trade Associations & Conferences: <ul style="list-style-type: none"> NACS – Natl Assoc C-Stores APCA – American Petro & CS Assoc PMAA – Petro Marketers of Amer Assoc Geo/Regional Associations Trade Magazines: NACS, CS News, CSP Magazine, CS Decisions, PetrolPlaza Lighting Magazines: LD+A, EdisonReport, Inside Lighting, NEMRA Business Magazines: WSJ, Inc. Social: LinkedIn (Professional) / FB (Personal)
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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 Constructioi	VP/Dir Maintenanc	Purchasing Manager	VP/Dir Constructioi	VP/Dir Maintenanc	A&E Firm	VP/Dir, Brand Image	Lighting Specialist
Awareness	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										
Consideration	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.)

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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 Constructio	VP/Dir Maintenanc	Purchasing Manager	VP/Dir Constructio	VP/Dir Maintenanc	A&E Firm	VP/Dir, Brand Image	Lighting Specialist
Convert	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	
Loyalty	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				
Advocacy	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

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Journey Stages	Specific Activities & Interactions	Indy Operator		Dealer/Franchiser (local customer)		
		Owner	A&E Firm	Owner	A&E Firm	Maintenance Mngr
Awareness	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					
Consideration	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.)

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 Rarely

Journey Stages	Specific Activities & Interactions	Indy Operator		Dealer/Franchiser (local customer)		
		Owner	A&E Firm	Owner	A&E Firm	Maintenance Mngr
Convert	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
Loyalty	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)	
Advocacy	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

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IMPORTANCE

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Journey Stages	Specific Activities & Interations	Petro Distributor		Petro Agent
		Principal	Sales Team	""
Awareness	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			
Consideration	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.)

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 Important/Does Sometimes
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Journey Stages	Specific Activities & Interations	Petro Distributor		Petro Agent
		Principal	Sales Team	""
Convert	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
Loyalty	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
Advocacy	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