The Essential Guide to Creating Candidate Personas
How to Drive Better Recruitment Messaging & Marketing Results

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Introduction

Are your recruiting messages just not hitting the mark? Is there a disconnect between your marketing strategies and job seekers? Trouble gaining traction with passive candidates? If you answered yes to any of these questions, it may be time to consider candidate personas. Borrowed directly from consumer marketing’s use of buyer personas to better understand the ideal customer, candidate personas lead to a deeper understanding of your ideal candidate and can allow you to create more relevant and meaningful communications.

The Value of Personas to Recruitment Marketing

More specifically, examining your audience through the lens of a persona reveals how you can tailor recruitment marketing efforts to the target candidate’s needs and interests. While candidate personas should inform your communications across the entire hiring process, the approach is particularly valuable to the management of talent communities because you’ll be able to customize your messaging and content effectively to each talent community, thereby increasing candidate engagement and conversions.

Inside you’ll find a step-by-step overview of what a candidate persona is and how to build one, as well as how to use a persona to create messaging and outreach strategies that are relevant to the talented individuals you’re working hard to attract.
What is a Candidate Persona?
What is a Candidate Persona?

A candidate persona is a compilation of the attributes that your ideal candidates for a specific job function or category share.

How Do I Uncover Shared Attributes?

The most effective candidate personas are driven by research and insights. This ensures that your personas reflect what the target candidates actually think and feel, as opposed to being based on what you currently believe to be true about your target candidates.

A Brief Note: Approach candidate personas as a method for a deeper understanding of your target audience but not at the exclusion of anyone during the hiring process, particularly exclusions that might inadvertently reflect protected classes such as race, religion, color, national origin, age or disability. Make it clear to your recruiting team that candidate personas are representative of “commonalities” only and not a specific or unique attribute that all candidates must possess.
Main Elements of Effective Candidate Personas

Most recruiting teams are new to the idea of candidate personas and often struggle with how to get started. A good way to manage candidate persona development is to focus your efforts on gathering the answers to three main questions:

- **Who are we talking to?**
- **What do they care about most?**
- **How can we reach them?**

Each question will have specific topics and related sub-questions that you will explore through a mix of primary and secondary research activities. However, using these three questions to guide your process will make it easier to manage and for others in your organization to follow. Once you complete your first persona exercise, you can adapt the process based on what worked best for your team.
This question covers basic requirements, from degrees or certifications earned to areas of expertise and prior accomplishments. While it may appear straightforward, you can use these topics to dig deeper and identify any gaps that could impact your messaging and marketing approach.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Associated Topics for Exploration</th>
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| Education/Training      | • Education level  
                           • Subjects studied or certifications earned  
                           • Specific degree needed based on hiring requirements                                      |
| Skills/Experience       | • Skills needed to succeed  
                           • Areas of expertise  
                           • Relevant industries                                                    |
| Location                | • Were the work is performed  
                           • Amount of travel, if any, involved  
                           • Current location(s) of available candidate pools                          |
| Accomplishments         | • Measurable accomplishments and/or outcomes that candidates have achieved                      |
What Do They Care About Most?

Here, your goal is to tap into the more emotional side of your candidates, or the reasons, beyond a paycheck, that they show up to work every day.

You’ll also uncover their current priorities in work and in life, as well as future goals.

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| Work Motivations        | • Types of projects that are most exciting to candidates  
                          | • Aspects candidates like least about the work  
                          | • What motivates candidates on a daily basis |
| Work Experience         | • Expectations regarding the work/team environment  
                          | • Collaboration style  
                          | • Management preferences |
| Career Priorities       | • Prior career path and future expectations  
                          | • Desire for management opportunities  
                          | • Participation in professional associations and development opportunities |
| Life Priorities         | • Hobbies and interests  
                          | • Work/life balance requirements |
How Can We Reach Them?

Finally, you will want to ensure that you understand the best ways to reach people.

Your exploration of these particular attributes can cover everything from why they decided to make a job change to how they spend their time outside of work, particularly when it comes to media use.

<table>
<thead>
<tr>
<th>Attribute</th>
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<tr>
<td>Triggers</td>
<td>• Reasons for seeking a new job in the past&lt;br&gt;• Willingness to consider new opportunities when not looking for a job&lt;br&gt;• Preferences regarding how they hear about new job opportunities (friends, colleagues, recruiters)</td>
</tr>
<tr>
<td>Job Search Behaviors</td>
<td>• Prior job search strategies used (most effective/least effective)&lt;br&gt;• Top sources of information about potential employers&lt;br&gt;• Job search pain points&lt;br&gt;• Expectations for the length of time a search will take</td>
</tr>
<tr>
<td>A Day in the Life</td>
<td>• How candidates spend a typical weekday, both at work and at home&lt;br&gt;• Favorite part of the day&lt;br&gt;• Media habits&lt;br&gt;• Weekend activities</td>
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Identifying & Overcoming Challenges
It's likely that some organizational challenges will arise as you move through the topics of exploration for each question.

This is another benefit of investing your organization's time in candidate personas—they force you to think through potential issues sooner rather than later. The following are three sample challenge scenarios and how each one might be overcome through candidate persona work.
Few candidates say they are open to changing jobs right now. This is not uncommon. Most people aren’t fans of change to begin with and successful professionals know that making a change always comes with risks. What you need to do to overcome this challenge is ask additional questions such as:

• **What, if anything, would change your mind about considering a job opportunity elsewhere?**
• **Who has influenced you the most when it comes to changing jobs? How were they effective?**
• **Would you be open to joining a talent network instead?**
CHALLENGE #2

We all know that the length of time it takes to get through a company's hiring process is among the biggest candidate pet peeves. It's also one of reasons people avoid looking for a new job if they don't have to. However, for hard-to-fill and priority positions you might find that the only way to get the talent you’re after is to match their expectations by adjusting your process. This won't necessarily be easy as it will require persuading hiring managers and others involved that they need to adjust the way they've always done things, but the alternative is that you consistently lose out on the talent the organization needs simply because you’re not moving quickly enough.
You already know that the best candidates aren’t usually engaged in an active job search. Couple this with a highly fragmented media landscape, and you’re faced with few, if any, advertising options that will reach target candidates. Job postings won’t work, and neither will a targeted digital display campaign. Instead, the budget will need to support efforts such as **referrals**, **networking**, and **conferences and events**.
Gathering Insights

Now that you have an understanding of the topics you'll explore for each of the three main candidate persona questions, we'll turn our attention to how you'll go about gathering your insights. Effective research is the foundation of your persona build, and, ideally, you'll use both primary and secondary methods to arrive at the richest and most accurate persona.

<table>
<thead>
<tr>
<th>What You Can Do</th>
<th>What To Ask Participants</th>
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<tbody>
<tr>
<td><strong>#1. Hiring Manager Interviews</strong></td>
<td>● Tell me about the individuals who have been most successful in these roles in the past?</td>
</tr>
<tr>
<td>Conduct one-on-one interviews with hiring managers to learn from their prior observations of successful employees, as well as what they would like to see moving forward. Aim for between three and five interviews.</td>
<td>● What are the essential skills and abilities? Are there new skills that would be ideal in future candidates?</td>
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<td></td>
<td>● Which professional organizations do these individuals belong to?</td>
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<td></td>
<td>● What do you know about these individuals personally?</td>
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<td><strong>#2. Professional Network Interviews</strong></td>
<td>● Describe the path that led to your current role. What are your career goals for the next three years?</td>
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<td>Reach out to those in your network who are in roles similar to those for the persona you are building. A brief 15-minute phone discussion is all you'll likely need, but if that's not possible then send them a few key questions to answer via email.</td>
<td>● In what industries have you worked and what size were the organizations? Which previous roles are most relevant to what you're doing today?</td>
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<td></td>
<td>● What skills and abilities do you rely on most to do your job?</td>
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<td></td>
<td>● What does a typical day look like for you—at work and at home?</td>
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<tr>
<td><strong>#3. Current Employee Focus Group(s)</strong></td>
<td>● When using these individuals to gather initial insights, focus on questions similar to those identified in #2 above.</td>
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<tr>
<td>Host a focus group with new hires who work in relevant roles. You can use this group to both gather insights for developing your persona and to validate your persona once it’s drafted.</td>
<td>● If you’re asking them to validate a persona you’ve drafted, structure the session so that they provide feedback on three critical aspects: what works, what doesn’t and what is missing.</td>
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Research Tip: When conducting interviews and focus groups, make sure you use open-ended questions as these will allow you to unearth things you might not have if you relied solely on questions that result in qualitative responses. For example, instead of asking someone how many companies she has worked for, ask her to describe the career path that led to her current role.
### Gathering Insights: Secondary Research

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<th>What You Can Do</th>
<th>What To Look For</th>
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<tbody>
<tr>
<td><strong>#1. Assess Applications from Previous Candidates</strong>&lt;br&gt;Tap into your Applicant Tracking System (ATS) to see what you can understand about past candidates.</td>
<td>- Pull the resumes of applicants who were invited to interview for relevant roles in the past, as well as those of applicants who were scored highly by your ATS. Identify what these individuals have in common (beyond matching keywords for skills and experience, of course). Review cover letters to understand any shared work motivations or career goals.</td>
</tr>
<tr>
<td><strong>#2. Conduct Online Research</strong>&lt;br&gt;Find out what you can about these professionals as a group by searching online for industry research and reports.</td>
<td>- There are numerous third-party research resources that can be used for your persona. For example, professional organizations often survey their members and then make reports available either free or for a small fee. Government institutions like the Bureau of Labor Statistics track key data points by occupational area.</td>
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<tr>
<td><strong>#3. Review Social Profiles</strong>&lt;br&gt;Identify the professional profiles of people who are currently in the role for which your candidate persona is being developed.</td>
<td>- Head to LinkedIn to review the profiles of people working in similar roles at other organizations. What can you tell about their career paths from their profiles? Who and what are they following? Which organizations and activities do they appear to be involved with, both personally and professionally?</td>
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</table>
Making Sense of it All

Once you've completed your primary and secondary research, it's time to make sense of it all. Here's how:

- Go back through your notes from each research activity. What are the major themes and significant patterns that emerge? Don't worry about how wordy your themes are right now or if you've included too much detail. This step is for you to gain a thorough understanding of what's behind your candidate persona.

- Next, match your themes to the different areas of the exploration topics. If there's an area that seems light on findings, go back to your research and look again. If the insights aren't there, you may need to do some additional research to fill in any gaps.

- Now, take the “themes” that you’ve identified and edit them down to arrive at a candidate persona framework (see page 20 for a sample framework) that is informative yet easy to digest. Circulate the draft for feedback and complete any validation exercises to finalize the framework.
Building & Leveraging a Persona
Sample Persona Build

To illustrate how all of the pieces come together, we’ll walk through the process of building of a candidate persona for a summer finance internship program that brings together current college students from across the country together for a three-month internship at the corporate headquarters. The internship culminates with a final project, and the top three projects are awarded cash prizes.

• You’ve had limited experience recruiting for your organization’s finance internship program, so you decide to start with some secondary research to familiarize yourself with the audience. You review reports from the National Center for Education Statistics and several reports from higher education industry consultants. You also find a report on the next generation of finance professionals prepared by the American Finance Association.

• While this provides a good general overview, you quickly realize that a true picture of the target student will require primary research. Specifically, you need to conduct one-on-one interviews with hiring managers and hold focus groups—lunch included, of course—with your company’s current crop of finance interns. You develop your questions for both the hiring manager interviews and the focus groups using the topics for exploration outlined under each of the three main persona questions.

• You assess the results of your research, summarizing the key themes and shared attributes you’ve uncovered. Among them are the following:
  
  o Hiring managers all agree that their best interns were members of the Undergraduate Finance Association and were likely to participate in sports either through school or on their own
  o While many of the current interns have some type of work experience, few had ever experienced a structured internship experience that involved spending their summer away from home
  o Most haven’t used their campus career centers regularly and those that have visited did so for resume help
  o All participants worry about their mounting student loan debt

• You now package your themes and attributes into the candidate persona framework, providing a much clearer picture of the people you’re trying to recruit for next year.
College Intern Candidate Persona Framework

The framework lays out all of the commonalities in a way that’s easy to understand while answering the three main candidate persona questions. Here’s how:

**Who are we talking to?**
- Academic background
- Prior work experience

**What do they care about most?**
- Post-graduation goals
- Obstacles/fears
- Hobbies/interests
- Work perspectives

**How can we reach them?**
- Job search strategies
- Media habits

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Meet Emily: Finance Intern & Standout Student

**ACADEMIC BACKGROUND**
- Just completed her junior year, on track to graduate with a finance degree
- Coursework spans risk management, capital markets, corporate finance and economics

**PRIOR WORK EXPERIENCE**
- Works part time on campus during the school year
- Spent her first two college summers lifeguarding and volunteering at an animal shelter in her hometown

**POST-GRADUATION GOALS**
- Find a job in a large organization that exposes her to a broad range of finance career paths
- May apply to graduate school

**OBSTACLES/FEARS**
- Worried about student loan debt
- Doesn’t know what to expect in professional setting
- Is nervous to spend the summer away from home

**HOBBIES/INTERESTS**
- Belongs to the Undergraduate Finance Association and previously served as treasurer
- Plays on several intramural sports teams

**WORK PERSPECTIVES**
- Wants to work on something innovative
- Expects her work to have high visibility
- Views work/life balance as a given

**JOB SEARCH STRATEGIES**
- Asks her professors for advice
- Been to career services before but only for help with her resume—doesn’t like the online database of jobs and internships because it’s overwhelming

**MEDIA HABITS**
- Watches YouTube videos that friends send to her
- Listens to Spotify, but pays to avoid commercials
- Documents everything on Instagram
- Scans Twitter for news
## Getting the Most Out of Your Persona

Now that you have a finalized candidate persona, it's time to start thinking about what the persona means in terms of both messaging development and marketing strategy. After all, the point of your persona is to help you reach prospective candidates through the right channels in ways that are relevant and meaningful to those who are most likely to be successful in the role you’re recruiting for.

<table>
<thead>
<tr>
<th>Messaging Development</th>
<th>Marketing Strategy</th>
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<tbody>
<tr>
<td>Highlight the social aspects of the internship program, including the sports-related activities interns can pursue locally, to alleviate concerns about being away from home and appeal to those who are athletic.</td>
<td>Take advantage of networking and promotion opportunities through the Undergraduate Finance Association.</td>
</tr>
<tr>
<td>Emphasize the competitive pay and final project prize amounts, leveraging testimonials from prior participants.</td>
<td>Ensure professors at target colleges and universities are aware of your company and the program, as well as the types of students you’re looking for.</td>
</tr>
<tr>
<td>Stress that the rotational aspect of the internship program exposes participants to a broad range of career paths.</td>
<td>Create a dedicated Instagram account to document all aspects of the program, using it to engage past, current and future participants.</td>
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Conclusion

Building a candidate persona requires a significant time investment. However, it is time well spent, especially if you are struggling to hire for hard-to-fill areas or are taking on a recruiting assignment that is completely new to you. View your persona frameworks as works-in-progress that you can build on and modify as you learn more and as the talent market shifts. While you want the initial persona to be extremely accurate, you should always look for opportunities to uncover additional attributes and revise your frameworks accordingly as this will ensure your personas remain relevant and effective.
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