

Using Personas

Personas are a great way to segment your ABM audience and market to a specific subset of people.

What's in this article?

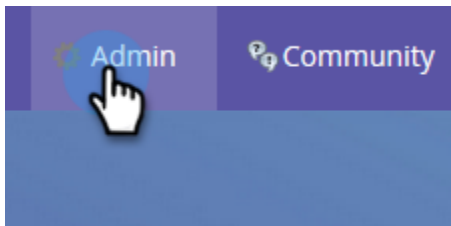
[Add a Persona](#)

[View Your Personas](#)

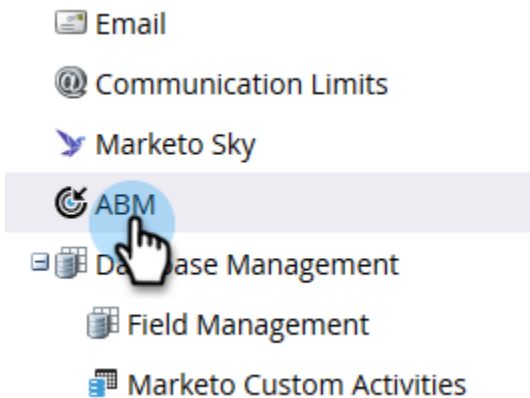
[Persona Filters](#)

Add a Persona

1. In My Marketo, click **Admin**.



2. In the tree, select **ABM**.




3. Click **Edit**.

Personas		EDIT
<u>Persona Name</u>	<u>Person Field</u>	
Title	Job Title (Automatic)	

Note

The Job Title persona is included by default. It cannot be modified or deleted.




4. To add additional personas, click **+Add**.

Personas

Name your persona groups and choose what field will define them.
There is a max of 3 persona groups.



	Persona Name	Persona Field
1.	Title	Job Title (Automatic)

 [+Add](#)


5. Give your persona a name, and select the corresponding field in the drop-down. You can add up to two additional personas. Click **Save** when done.

Personas ✕

Name your persona groups and choose what field will define them.
There is a max of 3 persona groups.

Persona Name	Persona Field
1. Title	Job Title (Automatic)
2. <i>Name Persona Label</i> 	<i>Select Persona Field</i> 
+Add	

NOTE: After saving changes to a persona, it may take up to 24 hours to update throughout the product. You may not edit the updated persona during this time.

CANCEL SAVE 

View Your Personas

View your personas by visiting a specific Named Account.

1. Select the desired Named Account.

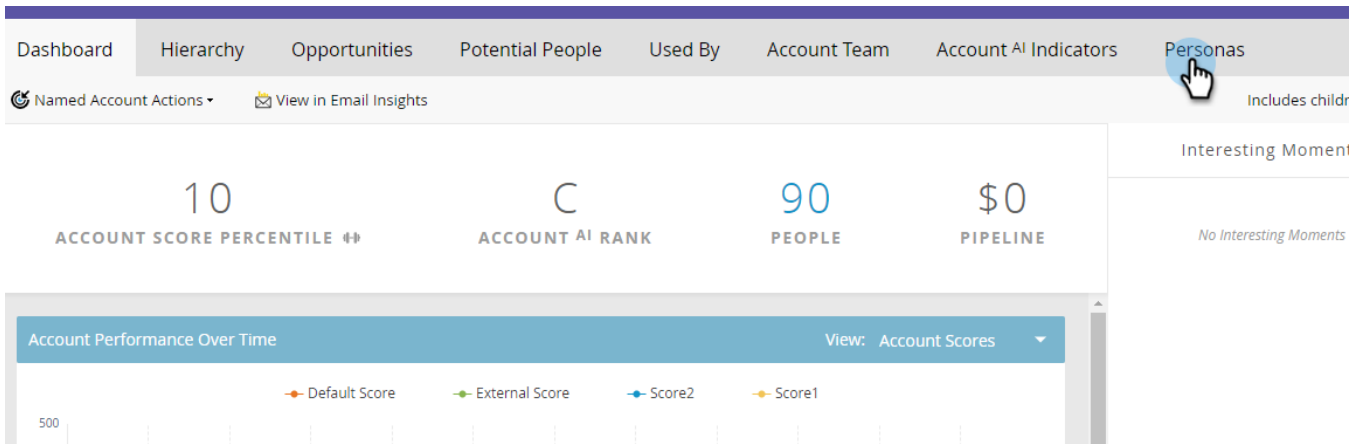
Dashboard ACCOUNT AI **NAMED ACCOUNTS**

+ New Named Account Actions

Group by Hierarchy Edit View

Named Account	Named Account ID	CRM ID	People	Default Score
Acme Corp	125		90	25 [10]
NA Persona Sort	142		14	0 [9]
Siemens AG	2798		12	
Avis Budget EMEA	2398		11	

2. Click the **Personas** tab.



3. All of your personas are listed. Click on a number to see the list of people.

Title Persona	People	Grade Persona	People	Product Persona	People
CXOs	6	One	0	Product1	0
XVPs	1	Two	0	Product2	0
Directors	0	Three	0	Product3	0
Managers	0	Four	0	Product4	0
Default	53	Five	4	Product5	0
		Six	0	Product6	0
		Seven	0	Product7	0
		Eight	0	Product8	0



Note

The X in the Title Persona acts as a wild card character. For example, "CXO" will include CEOs, CFOs, etc.

Persona Filters

Use persona filters in a smart list to market to a specific group of people.

The screenshot shows a software interface for managing a smart list. At the top, there are tabs for 'Marketing Campaign', 'People', and 'Smart List'. Below the tabs, there are controls for 'List Actions' including 'Use ALL filters', 'Collapse All', and 'Expand All'. A filter is applied: '1 - Title Persona' with the value 'is'. A sidebar on the right shows a list of filters: 'persona', 'Filters', 'Segmentation Filters', 'Grade Persona', 'Product Persona', and 'Title Persona' (which is highlighted in orange). A dashed blue arrow points from the 'Title Persona' filter in the sidebar to the filter box in the main area.