

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?

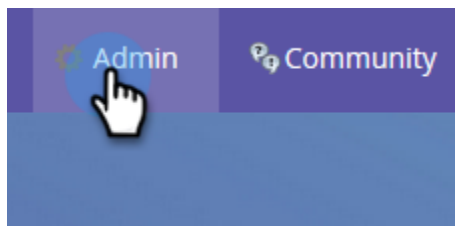
[Add a Persona](#)

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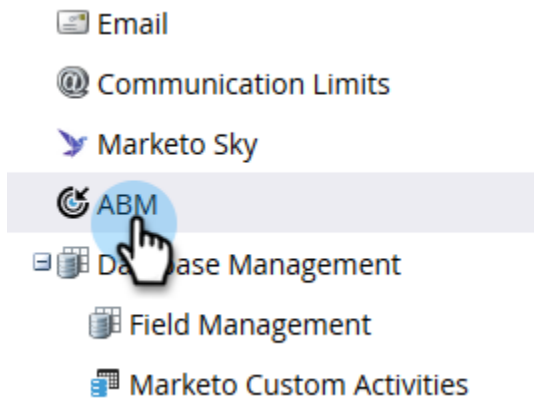
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Add a Persona

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> 	Select Persona Field 
+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 



Note

Only Salesforce custom fields of type "picklist" that have been synced to your Marketo instance are available in the persona field drop-down when creating a persona.

View Your Personas

View your personas by visiting a specific Named Account.

1. Select the desired Named Account.

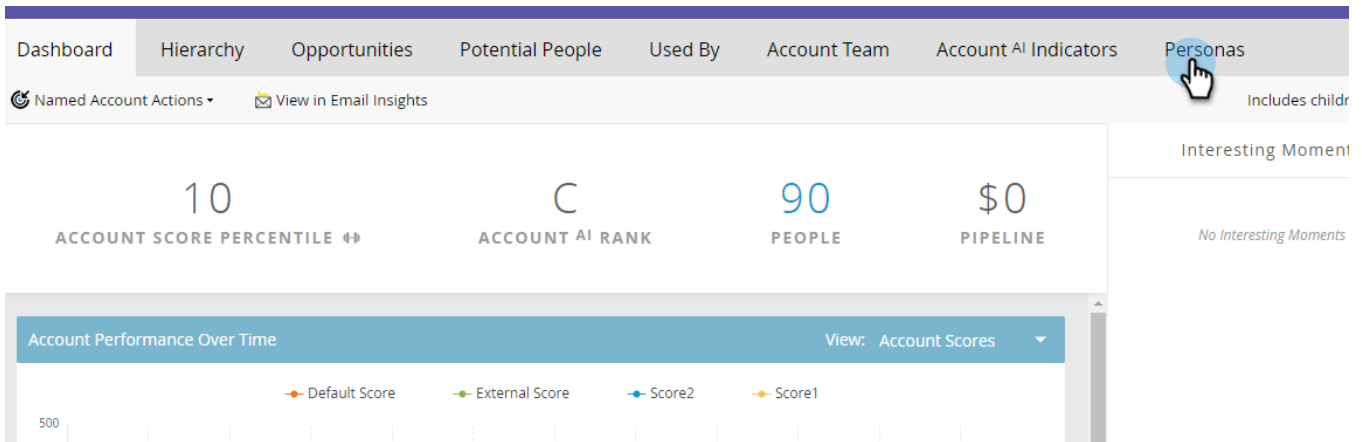
Dashboard ACCOUNT AI **NAMED ACCOUNTS**

+ 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 with a top navigation bar containing 'Marketing Campaign', 'People', and 'Smart List'. Below this is a 'List Actions' section with options like 'Use ALL filters', 'Collapse All', and 'Expand All'. The main area displays a filter for '1 - Title Persona' with the value 'is' and a 'Select...' dropdown. On the right, a sidebar titled 'persona' contains a 'Filters' section with 'Segmentation Filters' including 'Grade Persona', 'Product Persona', and 'Title Persona'. The 'Title Persona' filter is highlighted in orange, and a dashed blue arrow points from it to the main filter input.