THE DECISION SEQUENCE

MARKETING BUILT AROUND HOW PEOPLE DECIDE

A persona is not a segment

How to tell a persona from a segment

Why one describes how a buyer thinks and the other describes when they'll listen

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Why one describes how a buyer thinks and the other describes when they'll listen

Gates. **Relevance: primary.** Credibility: secondary. Proof: no. Safety: no. **Access: primary.** Two primaries is correct here, because the persona governs whether the message means anything and the segment governs the timing.

A persona describes how a client type decides. A segment describes when that type is ready to listen. Build the personas first. Sorting a list you don't yet understand gives you timing and nothing to say.

The symptom

The prospect list is sorted. Hot, warm, cold. Or by pipeline stage, which looks more rigorous because it has more boxes.

Now ask somebody what those labels say about the people inside them. Not where the deal stands. How that buyer makes a decision, what they're afraid of, what kind of evidence moves them, what makes them stop reading.

Usually nobody can answer. The label describes the firm's relationship with the prospect, and somewhere along the way the firm decided that was the same thing as knowing the prospect.

Then the outreach gets built on top of it. Sequenced properly. Timed against stage changes. And it lands in an inbox saying the same thing the firm says to everyone, at a moment chosen with real care.

Why it keeps happening

Segmentation is the part a CRM can hold, so segmentation is what gets built.

A field with three values feels like knowledge. It sorts, it filters, it reports, it becomes a dashboard by Friday. Psychology does none of that. There's no dropdown for risk tolerance and no picklist for the kind of validation a cautious general counsel needs before she'll return a call, so the firm builds what the software will accept and quietly reclassifies the rest as soft.

And what that field records is the firm's own activity. How recently we called. Which stage we moved them to. Whether the last email got opened. Fine for forecasting. It says nothing about the buyer.

We've made this one. We've built the segment map first, because the segment map is the one that fits in a spreadsheet, and it produced outreach that arrived at exactly the right moment saying nothing anybody recognised. The cadence was defensible. The message could have been addressed to any of four hundred people on the list, which, in the end, is roughly who it was addressed to.

Nothing about watching firms do this has ever made the mistake less common. Better tooling has mostly made it faster.

What the buyer is doing at the Relevance and Access gates

Running two tests that don't arrive together.

Relevance is whether the message sounds like it came from someone who understands the problem in front of them. That's a persona question, and it turns on decision style, bias pattern, what the buyer treats as evidence, what makes them suspicious.

Access is whether this is a moment when they're willing to spend any attention at all. That turns on where they sit in the adoption sequence, which is a question of how much social proof and validation they need before they'll commit to anything, from anyone.

Fail Relevance and the timing stops mattering, because a well-timed generic message is still a generic message. Fail Access and the sharpest message in the category shows up while the buyer is waiting to see who goes first.

Both gates have to clear. Only one of them is a scheduling problem.

The correction

Build the persona before touching the list.

Three or four psychographic profiles. Each one names how that type decides, what they fear, what evidence moves them and what repels them. The operator who won't move until a peer has already survived it. The technically fluent buyer who reads the methodology and dismisses anything that dodges it. The one whose real constraint is a board she has to face in November.

Marketing personas are psychological blueprints: decision-making style, bias patterns, risk tolerance, trust thresholds. They inform message design, and they answer one question. How do I communicate with this type of client?

Then, as a separate exercise with separate criteria, place real prospects into the adoption sequence. Audience segments describe when a client type is most receptive, based on how much social proof and validation they require before committing. They inform outreach timing and sequencing, and they answer a different question. When do I approach this client, and what level of social proof do they require before they'll engage seriously? Snippet 24 works that sequence and its segments in full.

The persona tells you how to communicate. The segment tells you when.

The order isn't reversible. Profile first, build the personas. Segment second, place them in the adoption sequence. Personalize third, use the persona to craft the message. Or, from the source: "Sorting prospects into segments before understanding who they are produces timing without insight, which produces outreach without relevance."

Name the failure that order prevents, because it's the one most firms are living inside: a message perfectly timed for a segment and written for nobody.

One piece of vocabulary to clean up while you're in there. Archetype shows up two ways in the older material, once inside the name of a segment and once as the label for the persona attached to that segment. Persona is the governed term for the how. Drop archetype from the working vocabulary and the ambiguity leaves with it.

Before and after

Same buyer, same slot in the sequence, same Tuesday.

Before. *Following up on our last note. We work with firms like yours, and this piece of thinking felt relevant to where you are.*

After. *You mentioned the board wants this settled before the audit. Two firms your size took it to committee last year using one page and a named reference. Here's the page. Here's the person who'll take your call.*

Run this on your own material

Open the CRM and find whatever field holds the segmentation, the one everybody trusts in the pipeline meeting.

Ask what that field tells you about how the people in it decide. Not last contact. Not stage. Risk tolerance, evidence they'll accept, the thing that makes them stop reading.

If the honest answer is nothing, the firm has timing without insight, and every sequence built on that field inherited the gap.

Then take the three largest buckets and try to write one paragraph per bucket describing how that buyer thinks. If you can write it, the persona work exists somewhere and hasn't reached the system. If you can't, that's the next two weeks of work, and it belongs in front of the next campaign rather than after it.

Signals you've cleared it

Advance when the persona and the segment live in separate places and sometimes disagree. A cautious buyer late in the adoption sequence and a cautious buyer early in it need the same message in different weeks, and when your team can say that out loud about a named prospect, the distinction has become real. Advance too when somebody rewrites a message because of who the buyer is and not because a follow-up came due.

Hold when everything anybody can tell you about a segment is a description of how it behaved in the last campaign. That's activity data wearing a persona's clothes. Hold when archetype is still in circulation with two meanings. And hold when the sequencing is finished and nobody can name what a single segment is afraid of.

Where this connects

Story from the Field · *The Four Words That Defined a Good Mother*, on describing the buyer before naming the product.

Research Library · Entry 02, heuristics and cognitive biases.

Next move · Go to *How to sequence outreach*, which is what the segment half is for.