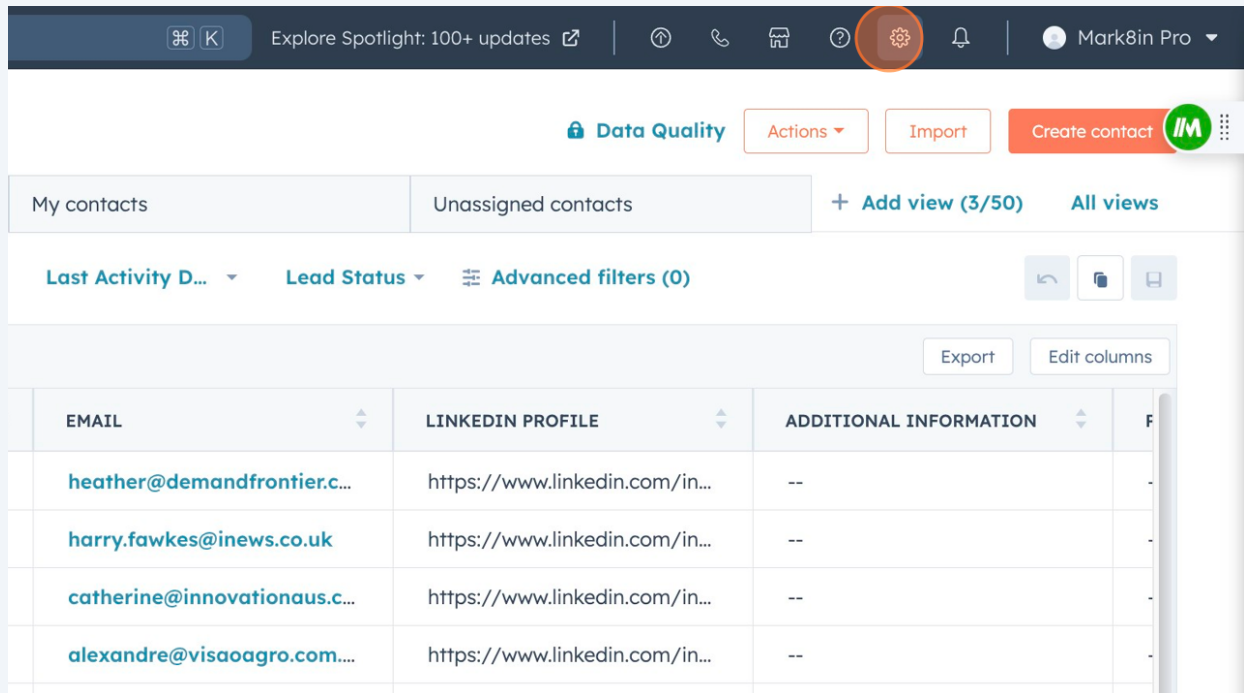


How to Create a Persona on HubSpot

1 Click on the Settings Icon.



The screenshot shows the HubSpot interface. In the top navigation bar, the settings icon (a gear) is circled in orange. Below the navigation bar, there are buttons for 'Data Quality', 'Actions', 'Import', and 'Create contact'. The main content area shows a list of contacts with columns for 'EMAIL', 'LINKEDIN PROFILE', and 'ADDITIONAL INFORMATION'. The table contains four rows of contact data.

EMAIL	LINKEDIN PROFILE	ADDITIONAL INFORMATION	F
heather@demandfrontier.c...	https://www.linkedin.com/in...	--	-
harry.fawkes@inews.co.uk	https://www.linkedin.com/in...	--	-
catherine@innovationaus.c...	https://www.linkedin.com/in...	--	-
alexandre@visaoagro.com....	https://www.linkedin.com/in...	--	-

2 Select "Properties"

The screenshot shows the HubSpot CRM interface. On the left is a dark navigation sidebar with icons for Workspaces, CRM, Marketing, Content, Commerce, Automations, Reporting & Data, and Library. The main content area has a search bar at the top with the text "Search HubSpot". Below the search bar is a "Data Management" menu with several options: Security, Properties (highlighted with an orange circle), Objects (with a dropdown arrow), Contacts (with a blue bar), Companies, Leads, Deals, Tickets, and Products. To the right of the menu is a "Contacts" page with tabs for Setup, Associations, and Lifecycle S. The "Setup" tab is active, showing a heading "Manage the information you collect and store at" and a sub-heading "Manage contact properties". Below this is a section titled "Creating contacts" with a sub-heading "Customize the 'Create contact'" and a description "Add, remove, or edit fields on the 'Cre".

3 Click the "Search properties" field.

The screenshot shows the HubSpot Settings page. On the left is a "Settings" sidebar with sections: "Your Preferences" (General, Notifications), "Account Setup" (Account Defaults, Users & Teams, Integrations, Marketplace Downloads, Tracking Code, Privacy & Consent, Security), and "Your Preferences". The main content area is titled "properties like First Name or Lead Status." and has a "Select an object:" dropdown menu set to "Contact properties". Below this is a "Properties (190)" section with tabs for "Conditional property logic" and "Groups". A "Search properties" field is highlighted with an orange circle. To the right of the search field are filters for "All groups", "All field types", and "All users". Below the search field is a table with columns "NAME" and "GROUP". The table contains two rows: "Additional Information" (Multi-line text) and "Annual Revenue" (Single-line text), both in the "Contact in" group.

<input type="checkbox"/>	NAME	GROUP
<input type="checkbox"/>	Additional Information Multi-line text	Contact in
<input type="checkbox"/>	Annual Revenue Single-line text	Contact in

4 Search for Persona and click on edit

The screenshot shows a search interface with a sidebar on the left and a main content area. The sidebar contains a list of categories including 'Persona Management' which is highlighted. The main content area has a search bar with 'perso' entered. Below the search bar, there are filters for 'All groups', 'All field types', and 'All users'. A list of search results is displayed, with the first result 'Persona' (A contact's persona) highlighted. A tooltip is visible over this result. The second result, 'Persona' (Dropdown se), has an orange circle highlighting its 'Edit' button.

5 Click "Add another persona"

The screenshot shows the configuration page for a 'Persona' dropdown field. The page has tabs for 'Basic info', 'Field type', 'Rules (1)', and 'Used in (0)'. The 'Field type' tab is active. Under 'Field type', it shows 'Dropdown select'. Below this is a table with two columns: 'NAME' and 'INTERNAL VALUE'. At the bottom of the table, there is a link '+ Add another persona' with an orange circle highlighting it. At the bottom of the page, there are 'Save' and 'Cancel' buttons.


6

Create the Persona you want.

Persona

We have many classes and certifications on how to develop and use personas in your mar

Basic information

 Upload a photo of your persona

Name *

Make it something memorable

Description *

This will be the external description

Internal notes

Roles

What kinds of jobs does this persona have?