

## Buyer Persona Profile: Asset Manager (\$5-\$10B AUM)

### Template Sections:

**Persona Name:** CIO Chris

#### Background

- Has been with the asset management firm for 15 years, rising through the ranks.
- Known for being conservative but data-driven in his decision-making.
- He's not a fan of sudden changes but respects innovations that are well-proven.

#### Demographics

- Chris loves routine—he's an avid runner and enjoys quiet weekends with his family and their Labrador, Max.
- He's wary of overhauling systems but is seeking ways to leave a lasting legacy before retirement in the next 5-7 years.

#### Goals and Challenges

- **Goals:** Secure steady portfolio performance, ensure compliance, and leave a positive legacy.
- **Challenges:** Navigating regulatory changes and market volatility while avoiding costly risks.

#### Values and Fears

- **Values:** Stability, proven results, and maintaining the firm's strong reputation.
- **Fears:** Large-scale failures from untested innovations or shifts that disrupt his team's efficiency.

#### Preferred Communication

Chris prefers in-person or video meetings, with detailed presentations to assess ROI and compliance impact.

#### Buying Decision Factors

- **Key Motivators:** Risk-averse, needs to see data-driven success stories and peer testimonials.
- **Objections:** High upfront costs, implementation difficulties, or tools that may disrupt team dynamics.