

Get Clear on Your Ideal Candidate



Hiring is accelerating. Complexity is rising. And TA teams are being asked to do more—with less margin for error.

Even as teams move faster, the path to the right hire isn't getting any easier. Nearly half of recruiters (47%) say hiring will remain “very” or “somewhat” challenging in 2026.

And the pressure points are familiar: intense competition from other employers (50%), a shrinking pool of quality candidates (46%), and rapidly rising candidate expectations (42%, up from just 24% in 2024).

The answer isn't simply more applicants—it's better alignment.

That's where candidate personas come in. Think of your candidate personas as ultimate representation of your ideal candidate—including detailed information on the skills, experiences, behaviors, and motivations that you would expect to see in your new hires.

Built with real data and clear intent, personas help teams focus on candidates most likely to succeed, move faster with confidence, and create hiring experiences that actually connect, within the context of your organization.

Build Personas Based on Real Candidate Feedback

Candidates today are evaluating roles on more than job titles and compensation. They're looking for alignment with their values, work environment and work style preferences, and long-term career goals.

That shift means candidate personas can't be static documents—if they ever could be. They're living tools for navigating an increasingly complex talent landscape. While input from recruiters and hiring managers still matters, effective personas today must account for more—work-model preferences, expectations around flexibility, and how candidates engage with hiring technology itself.

One of the most effective strategies to keep personas current is a simple one: listening directly to candidates.

Post-interview surveys not only help maintain engagement; they capture real, experience-driven insights teams can actually act on.

Below are a few data points you can include in candidate surveys to build—and continually refine—personas that reflect who your candidates are today, not who they were a year ago.

- **Application Sources:** How and where the candidate found out about the job.
 - Ex: LinkedIn, Indeed, Company website
- **Role Type and Seniority:** The type of role the candidate is targeting and their level of experience
 - Ex: individual contributor, people manager, or executive.
- **Work Model Preferences:** What environment the candidate prefers to work in.
 - Ex: Remote, hybrid, or in-office work.
- **Technology Comfort Level:** How experienced the candidate is with the specific technology that the role would require.
 - Ex: Microsoft Suite, Salesforce, Jira.
- **AI Expertise:** How familiar the candidate is with AI tools and how to responsibly use them within their role.
 - Ex: ChatGPT, Microsoft Copilot, Gemini.
- **Career Motivation:** What drives candidates' job searches.
 - Ex: Flexibility, advancement opportunities, company culture.

Bring Your Personas to Life

Once you've gathered the right insights, partner with your hiring team to bring those findings to life through clearly defined candidate personas. Start with at least two personas aligned to the core roles across your organization, then expand as needed—larger teams or more varied hiring needs may benefit from five or six.

The goal isn't perfection, it's coverage. Make sure every department is represented, even if they're not actively hiring today. That way, when demand shifts, your team isn't left starting from scratch.

Use the template on the next page to document each persona and create a shared reference point that keeps recruiters, hiring managers, and leadership aligned on who you're hiring for—and why.





Category	What to Capture (with Examples)	Notes / Prompts (with Examples)
Persona name & summary	Short persona label and description <i>Example: Mid-market AE— motivated by winning deals and strong earning potential.</i>	Combine role and motivator <i>Example: quota-driven closer seeking growth</i>
Role type & seniority	Functional focus and level of responsibility <i>Example: Mid-Market Account Executive (IC)</i>	Scope of influence, decision-making authority <i>Example: individual contributor with full-cycle ownership</i>
Common past roles	Typical previous positions or paths <i>Example: SDR, BDR, Account Executive</i>	Look beyond exact titles <i>Example: entry-to-mid sales progression</i>
Education & credentials	Degrees, certifications, or equivalent experience <i>Example: Bachelor's degree or equivalent experience</i>	Required vs. Preferred <i>Example: degree preferred, not required</i>
Hard skills	Tools, technologies, certifications <i>Example: Salesforce, LinkedIn Sales Navigator</i>	Separate must-haves from differentiators <i>Example: Salesforce required; LinkedIn Sales Navigator nice-to-have</i>
Soft skills	Leadership, communication, collaboration <i>Example: persuasive communicator, resilient, coachable</i>	Include behaviors tied to success <i>Example: handles objections calmly</i>
Technology comfort (including AI)	Level of fluency with role-related tech and AI <i>Example: uses AI to draft emails and summarize calls</i>	Passive user vs. power user <i>Example: daily AI user</i>
Values & motivators	What matters most to this candidate <i>Example: uncapped commission, product-market fit</i>	What makes them stay? <i>Example: winning culture, recognition</i>
Work-model preference	Remote, hybrid, in-office <i>Example: hybrid or remote</i>	Degree of flexibility expected <i>Example: 2 days onsite max</i>
Career stage & growth goals	Near-term and long-term aspirations <i>Example: grow into Senior AE</i>	Specialist vs. leadership track <i>Example: IC advancement path</i>
Decision drivers	Factors that influence offer acceptance <i>Example: comp plan, growth opportunity</i>	Top three drivers and deal-breakers <i>Example: comp, territory, manager</i>
Compensation expectations	Target range or structure <i>Example: \$80k base / \$160k OTE</i>	Base vs. variable, flexibility <i>Example: open to higher variable</i>
Competitive threats	Other employers or roles competing for this talent <i>Example: B2B SaaS hiring Mid-Market AEs</i>	Industry, role type, market demand <i>Example: companies expanding sales teams in the same region</i>
Preferred communication channel	How the candidate prefers to engage <i>Example: LinkedIn or email first</i>	Email, text, async tools, live conversations <i>Example: text for quick updates, video call for interviews</i>
Job search behavior	How and when they look for roles <i>Example: Passive but open to outreach</i>	Active vs. passive, channels used <i>Example: not actively applying</i>
Biggest work frustrations	Pain points in current or past roles <i>Example: Unrealistic quotas, poor enablement</i>	Process, tools, management, growth <i>Example: constant fire drills, outdated systems, no career path</i>
Employer Value Proposition (EVP) expectations	What they want from an employer <i>Example: Strong enablement, fair territories</i>	Culture, growth, flexibility, purpose <i>Example: collaborative team, learning budget</i>
Hiring experience preferences	Ideal interview pace and format <i>Example: Fast process, conversational interviews</i>	Tolerance for assessments or AI-assisted steps <i>Example: ok with mock pitch</i>
Risks & tradeoffs	Areas requiring alignment or compromise <i>Example: Needs ramp time on complex product</i>	Skills gaps, training needs <i>Example: extended onboarding</i>



Category	What to Capture	Notes / Prompts
Persona name & summary		
Role type & seniority		
Common past roles		
Education & credentials		
Hard skills		
Soft skills		
Technology comfort (including AI)		
Values & motivators		
Work-model preference		
Career stage & growth goals		
Decision drivers		
Compensation expectations		
Competitive threats		
Preferred communication channel		
Job search behavior		
Biggest work frustrations		
Employer Value Proposition (EVP) expectations		
Hiring experience preferences		
Risks & tradeoffs		