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## Why Personas Matter

*One XD Strategist's Perspective*

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## Why Personas Matter, Point of View

So many times when I start a presentation on personas and the value they bring to any organization (whether it is a development team, a creative design team, or yes – even a marketing team), the push back I face is this perception that personas are really just “fluff” that cannot enable decisions and affect the bottom line. In my experience, that is just not the case. I have seen great products fail because the product engineers started with a set of cool features and later looked for a customer segment that might use them. I have also seen mediocre products succeed because instead of building a segment around the product, the team started with a set of individual people, trying to accomplish specific tasks... and then built a product that could help them accomplish their goals.

How did personas help them do that? Simple – they were based on research and facts (not archetypes or assumptions) and focused on behaviors, not segmentation data that represents how the business views its customers instead of how customers view themselves.

### ***Personas Help You Focus on What Matters***

My first “taste” of personas was during a product development project for a new consumer focused Voice Over IP (VoIP) phone service. While it was a fantastic opportunity to work along side the engineers who were defining what this product could be, it was also a challenging one for the very same reason. Our role in this project was to help define the user experience for every aspect of the product – the sign up process, in store experience, installation experience, and most importantly – the online and handset interactions for actually using the service / feature set. Because this was a completely new consumer phone service (no-one else was doing it yet) it was hard not to get caught up in the excitement of the technology and what it could do.

So what happened? In a nutshell – we lost sight of who would actually purchase and use this product. Even though we were following a traditional User Centered Design methodology, we were focusing more on product design and less on interaction design. Our first round of testing brought us quickly back down to reality when we learned that while potential customers were intrigued by the product – they absolutely could not see themselves using it. The reason? Instead of designing a product to fit life scenarios, we had tried to design real life scenarios to fit the product.

To address that issue – we had to back up a bit and reevaluate the product based on a better understanding of its various customer (audience) types rather than just lumping them all into one bucket called “consumer”. From that, we created scenario based personas for each of the following types of consumer customers: Busy Households, Connected “Younger” workforce, Small Businesses (Virtual Office), Small Businesses (Traditional Office), etc. We used those personas to answer key questions about the product and how it could help address specific scenarios for each persona: How would they connect to the service? What channels would address their tasks best? Which features would best support them?

Our end result? When the product finally went live – customers got it. Instead of being lost in a sea of features with no story line to pull them together, they knew they were purchasing 1 service that happened to have 5 ways it could be used. Our scenarios made the product real to them. They also helped us do things like refine the design and messaging on the box the install kit came in, better focus our marketing messages so that they grabbed the attention and called potential customers to action. Lastly, it established this product as part of a brand that customers already knew and trusted for products that provided value at a good price – something that we already knew was very important to the business, the customer, and the success of the product.

### ***Personas Reveal Unspoken Cast Members***

One of my favorite persona projects was for a specialty pharmaceutical company who thought they knew everything there was to know about the patients taking (or qualifying for) one of their medications. They made this claim to me during my project kick-off I suggested that we might want to take a little time identify and humanize all of our patient group audiences. Their response? The very loud “THUMP” of a 500-page segmentation report that dropped on our conference room table.

When I pressed on the topic a bit further (having seen these kinds of reports before), what I was told was - they had it covered. While they had not read the report themselves, their agency had it covered. They were pleased with the websites they had up and the overarching CRM strategy they were delivering on. Unfortunately, after a few days of speaking with treatment decision influencers (in other words, the indirect target audiences), we learned that their CRM strategy had some significant gaps – both in message and channel – and a key reason for this was a lack of understanding of both primary and secondary target audiences.

Our remedy to this problem was not actually found in another 500 page study, rather in an intense 3 week effort reviewing the research that had been done, identifying gaps in that research, and then conducting very targeted interviews with representatives from the various audience types which had not been included in the original study, and turning all of that data into very tactical, scenario-based personas, which could address key questions such as:

- When are patients likely to “fall out of the process” of filling their prescriptions and why?
- What messages could capture an undiagnosed patient’s attention?
- What information does a family member/ loved one need to support the undiagnosed or newly diagnosed patient in selecting the right course of treatment
- Where are there gaps in the experience road map and what new interactions should be added to fill those gaps?
- What interactions are currently in the road map that are not needed?

So – what did we learn from this approach? We identified several key gaps in the CRM strategy including:

- The role of care givers in helping undiagnosed patients recognize they have a condition, that a doctor’s visit is necessary, and that it is treatable with medication!
- Marriage and Career Counselors often take on the responsibility of reminding the patient to keep their appointments, replacing lost prescriptions, and following up to make sure the patient is taking the medication and that the desired results are being experienced.
- There are opportunities in print media and social media to capture the attention of undiagnosed adults with this condition that are not being capitalized on.
- Current unbranded websites may not be reaching their target audiences because of how key messages are positioned.

## ***Personas Are Not Just For “Users”***

Personas can inform all kinds of decisions – such as how to allocate your media-buying budget, or how the individual pieces of a new high speed Internet wireless router should be packaged in the box. They can also be used for things such as designing and implementing a change management strategy. While not the technique you might first think to call upon, let me share a story with you where a focus on persona creation changed the game of how a global pharmaceutical company was going to prepare their employees for the roll out a new MS solution focused on connectivity and collaboration.

A while back, we received a call from one our larger global clients. They were making the move from Lotus Notes and share drives to a Microsoft solution that included not only Outlook and the rest of the Microsoft suite, but MS collaboration and connectivity tools as well. The focus of this persona project was NOT to inform the design of the MS tools, or even which tools should be rolled out to which employees – rather, to help define what the right communication and training techniques were for the various audiences within the company (based on geography, role, business unit, tenure, etc). This would be a global project with a tight timeline and a need to reach a selection of employees from all over the world. To do this, we would need to employ a variety of research techniques including in-person focus groups and interviews, virtual focus groups, online surveys, and review of existing knowledge capital about the company’s employees. The personas will be used to inform the methods, techniques, and tools that would be used to bring all employees up to speed on the major behavioral changes expected in how they will do their jobs in the future.

Before we got very far into our research, one of the first things we learned is that how the company defined and categorized its employees was NOT how the employees defined themselves. As a result, all of the going-in assumptions around what they would need to make this change were out the window... it was a game changer. Once we were able to get our client comfortable with this switch in how they should think about their employees, we needed to focus on changing some basic assumptions. Some of the things we learned that ran counter to conventional wisdom included:

- Employees identify themselves first by their role, then their organization (not the other way around);
- Geography, while an important facet of each audience type, was rarely the driving force in differences between how they wanted to be communicated with or the messages that would get their attention;
- Classroom training was not the preferred style of learning for this kind of change for most employee groups.

We would never have been able to take these kinds of insights and turn them into actionable recommendations and a true Change Management Strategy if we had not taken the time to build out our personas and map them to realistic and relatable scenarios. The scenarios helped us understand the context in which communications and training materials would be accessed. Even more importantly, the personality type analysis helped us understand the types of messages that would grab their attention, who those messages needed to come from, and uncovered new/ unknown information sources that were just as integral to this program's success as the formal channels management was already aware of.

In the end, a company that historically did not do change very well found itself in a huge windfall of success as the tools were rolled out and employee behaviors were changing in the desired way.

## ***Personas Bring Customer Segments to Life***

While we may want personas to be real people sitting in the design room with us – they aren't. The challenge with this is that sometimes, a team will get so "close" to their personas that will forget the predictability of an inanimate object and use it in place of real live and breathing people to ultimately test out the interaction or idea. That said, just because personas cannot talk doesn't mean they cannot still inform decisions and ultimately get a team to a better solution. The trick is to keep everything in balance.

For example, a recent medication website design project had a very short time frame for making changes prior to going live. The website was scheduled to go through a med-legal review in two weeks, which meant my team had about one week get changes into the design agency. To make sure we were evaluating the website based on the target audience's needs and not our own, we had our personas perform the usability review of the website. A scorecard of key usability best practices and standards was created and each of our five personas completed that scorecard. My team members "role played" based on the data presented in the personas.

One of my favorite insights was around the overall design of the website. While to someone without the condition this medication treated might have looked at the overarching design and claimed that it was too busy and disorienting, someone with the condition would most likely be engaged and find value in the website because of its ever-changing content, flash colors, and wide variety of images to look at. Other insights our personas uncovered were around the messaging and how content was written. While best practices for web content writing might tell us to start with the punch line (or so-what factor), for patients with this particular condition it was imperative that the piece start with a piece of information they could relate to right now (e.g. not being able to complete an important task). Personas helped us rewrite the content to lead with the piece of information that would grab the patient's attention and quickly move them down to the call to action.

Personas make customer segmentation more than just a list of customer breakdowns and ways of mapping programs and revenue predictions – they make those segments real by highlighting real people in each of those segments and showing (rather than telling) how they will react in a given situation. Whether it is finding out who will leave a website or give up on installing a wireless router – personas help us predict that behavior, understand the trigger, and then determine what (if any) modification should be made.

## ***Personas Drive Decision Making***

If I haven't managed to convince you yet of the decision driving power of personas, let me share one last story with you.

A large consulting company asked us to develop a set of personas for them that would map to the various stages of the marketing lifecycle and address the needs of both current and potential clients. They were in the process of designing a new website for their top clients, which would be password protected and provide exclusive thought leadership content on it. Their hope was to use a tool like personas to help evaluate the usability of the website and provide direction on any additional online assets they should consider building for their various client tiers. After a few weeks of interviews, we were ready to build our personas and perform our evaluation of the new website.

The "Ah-Hah" discovery of this exercise was that based on what we now knew about our audience, what they were trying to do, and how they were trying to do, we could confidently state what we had suspected when we first came onto the project – most visitors to this website would never get past the initial video from the CEO talking about innovation. The reason? In addition to not being able to close out of the video, visitors to this website – who would most likely be members of the C-suite – would never have the time necessary to engage with this style of website.

Personas helped the team update the design of the website to be more usable. They also helped refocus the content so that it was less of a sales pitch and more of a discussion on hot topics of interest for decision influencers (rather than decision makers). The happy ending of this story was that not even a year after go-live, true ROI could be found in the revised approach to this online experience. In addition to saving money by not building features no one would use, they were also able to better target their next year go-to market strategy by mapping sales back to the top downloaded and discussed thought leadership pieces.

### ***In the end...***

Personas are able to provide a lot of value to an organization if they are created with a specific purpose in mind and built out to the right level of detail. Personas need to go further than those initial profile pages to truly highlighting scenarios, behaviors, and attention getters. They can include tools like road maps, interviews, scorecards, and a host of other decision informing features if you take the time to dive in and get to know your audiences in an intimate way. Personas should have a seat at your design table and be positioned as active members of the business/ product team. They should also be revisited often to ensure they remain relevance to what you are trying to accomplish. In the same way that we all change as time progresses, so do our personas.