Identifying & Creating Customer Personas

contents

What Is a Customer Persona?

definition: customer persona

Customer personas are fictional, generalisations of your most important customers. They help teams understand their customers by encompassing demographic information like age, gender, location and income, alongside psychographic information like interests, frustrations and motivations for purchasing your products/services

Building customer personas helps teams address the following;

- Who are our customers?
- What are their common behaviour patterns?
- What are their shared pain points (professional and personal)?
- What are their universal goals/objectives?
- What general demographic and psychographic information may influence their decisions?
- What drives them to make purchasing decisions?

example: customer persona

SYS. ADMIN SAM

PROGRESSIVE **EFFICIENT** **ANALYTICAL** **IMPATIENT**

AGE: 32
OCCUPATION: System Administrator
EDUCATION: B.S. Computer Science
EXPERIENCE IN ROLE: 7 Years
STATUS: Single
TIER: First Time User
ARCHETYPE: The Realist

"I want streamlined communication/ processes across the company so I don't waste my time on trivial tasks that colleagues could easily perform themselves"

MOTIVATIONS

INCENTIVE
FEAR
ACHIEVEMENT
GROWTH
POWER
SOCIAL
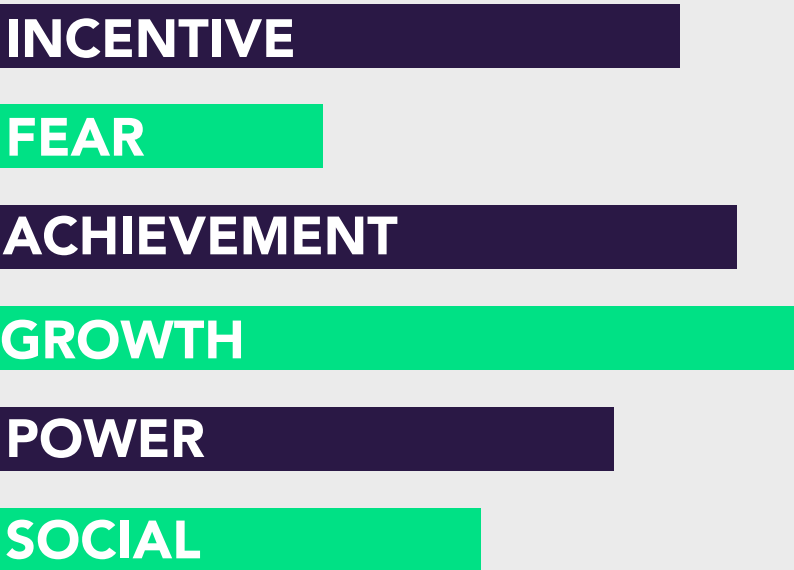
GOALS

Auto alert & corrected issues

Real time advanced network mapping

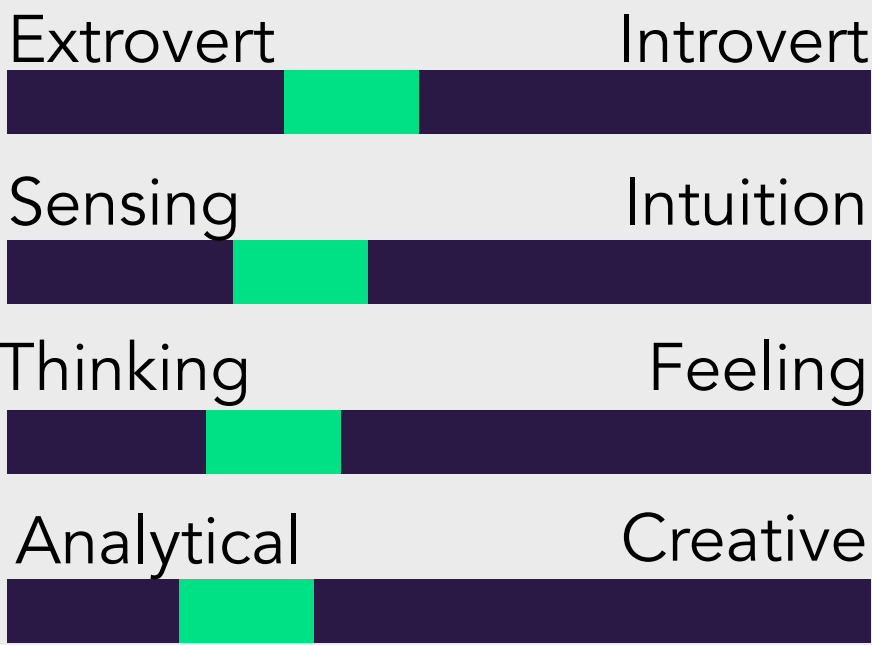Predictive analysis & custom reports

Configuration management

RESPONSIBILITIES

Monitoring and configuration of networked systems

Installing and maintaining application software
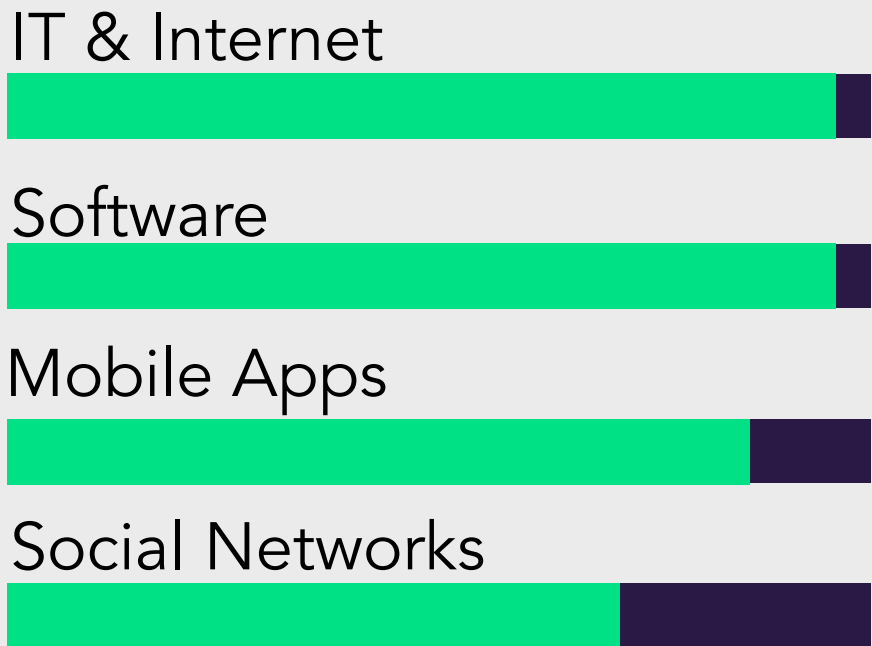
Managing user accounts and access rights

FRUSTRATIONS

Lack of documentation/change management and inter-disciplinary communication

Wasted time/lack of progress

User error - users who don't document error messages

PERSONALITY

Extrovert — Introvert

Sensing — Intuition

Thinking — Feeling

Analytical — Creative

TECHNOLOGY

IT & Internet

Software

Mobile Apps

Social Networks

why are they important?

Help identify customer specific needs and wants: this understanding ensures that PM's, designers, developers etc. are building products/features that *actually* align with actual user needs

Personas provide a "face" to the user story: this helps the team have a shared understanding of who their customers are, creating buy-in and empathy around building solutions to problems *real* people are facing.

Targeted/Segmented MarComs: understanding your customers needs, challenges, and behavioural influencers, allows you to better understand what content will appeal to them best by segmenting your customers by persona type and tailoring your marketing communications to each specific group
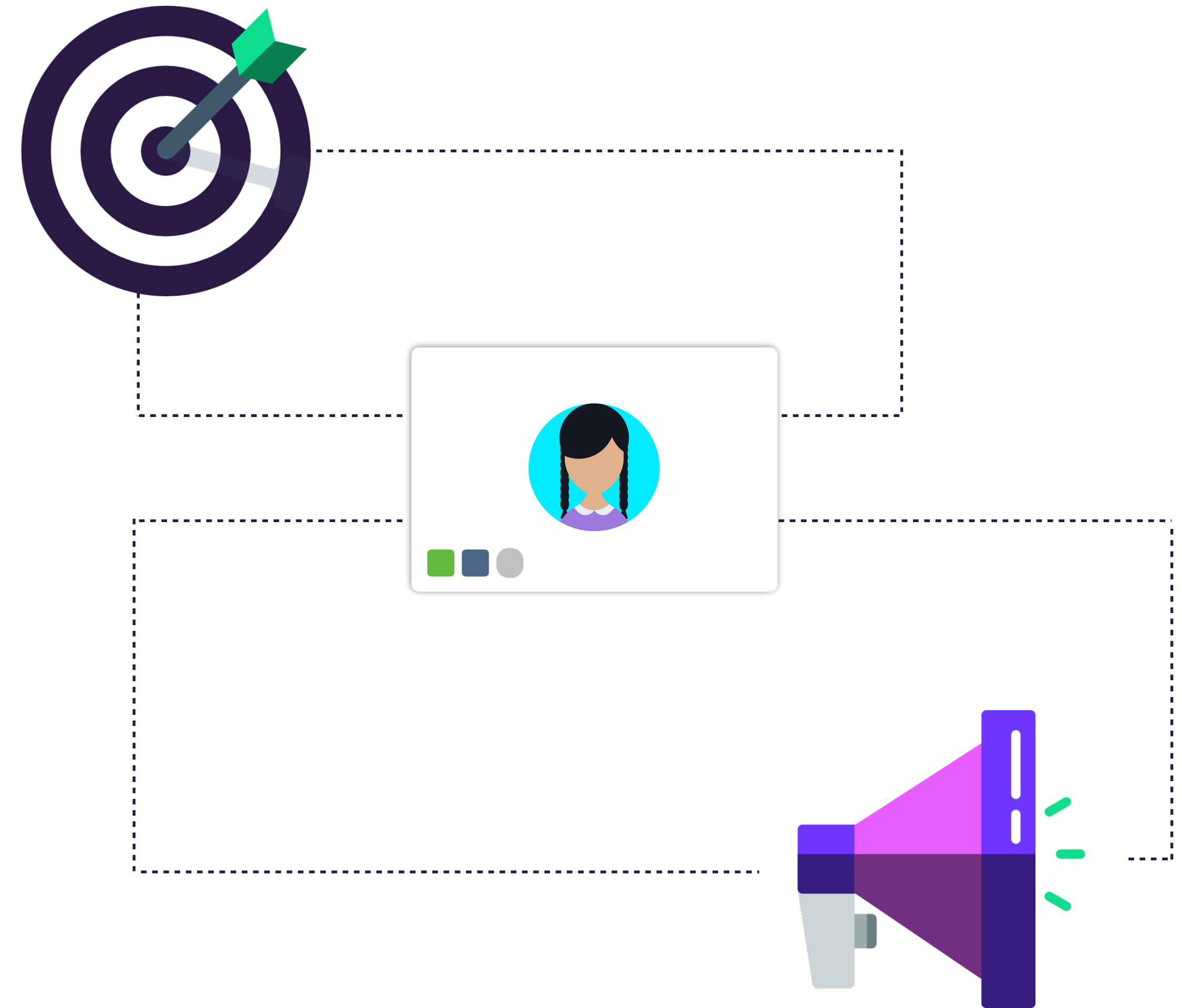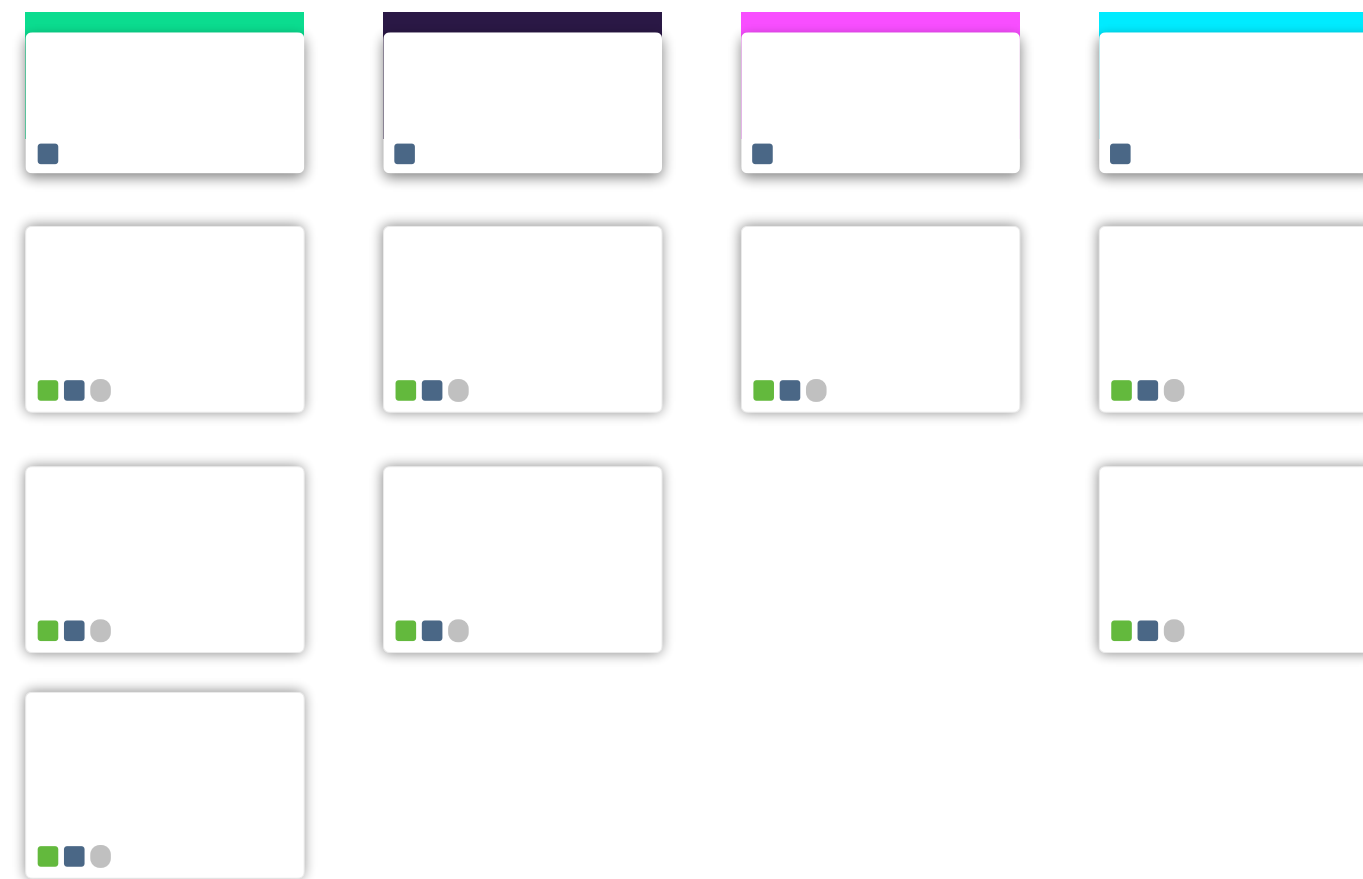
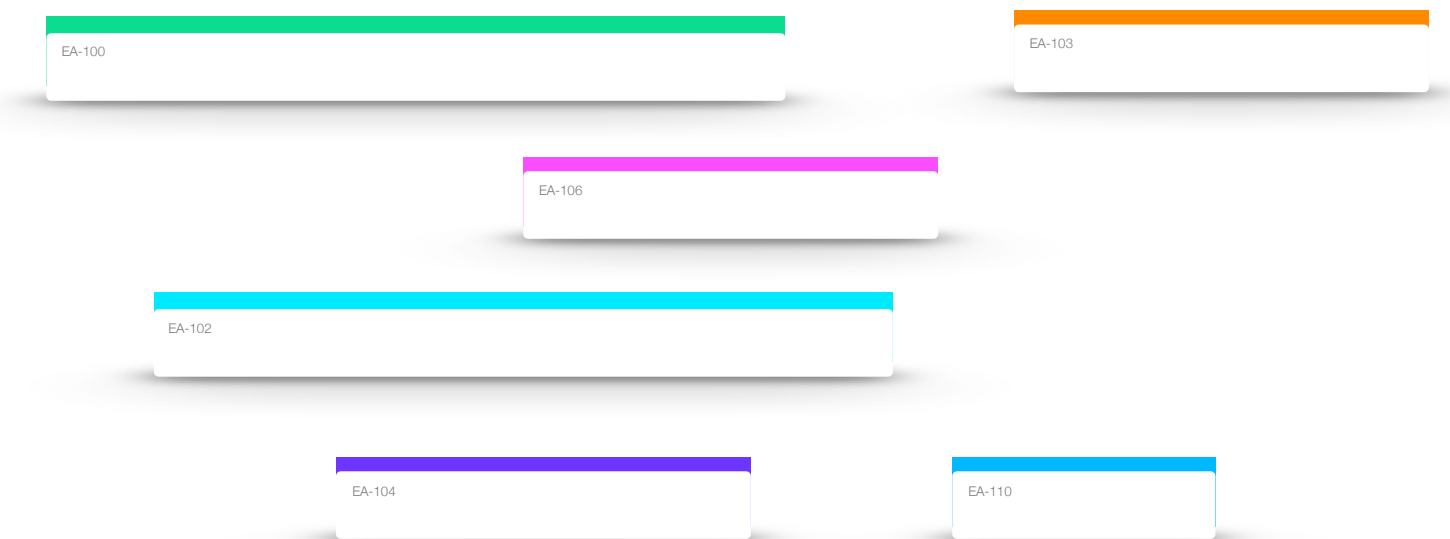# what do personas have to do with user story mapping?

Before we create a User Story Map, we need to know/understand; **who are our users?** By creating customer persona's before we build out our User Story Maps, we have a better idea of how those users will engage with the product, and their goals/objectives of using it
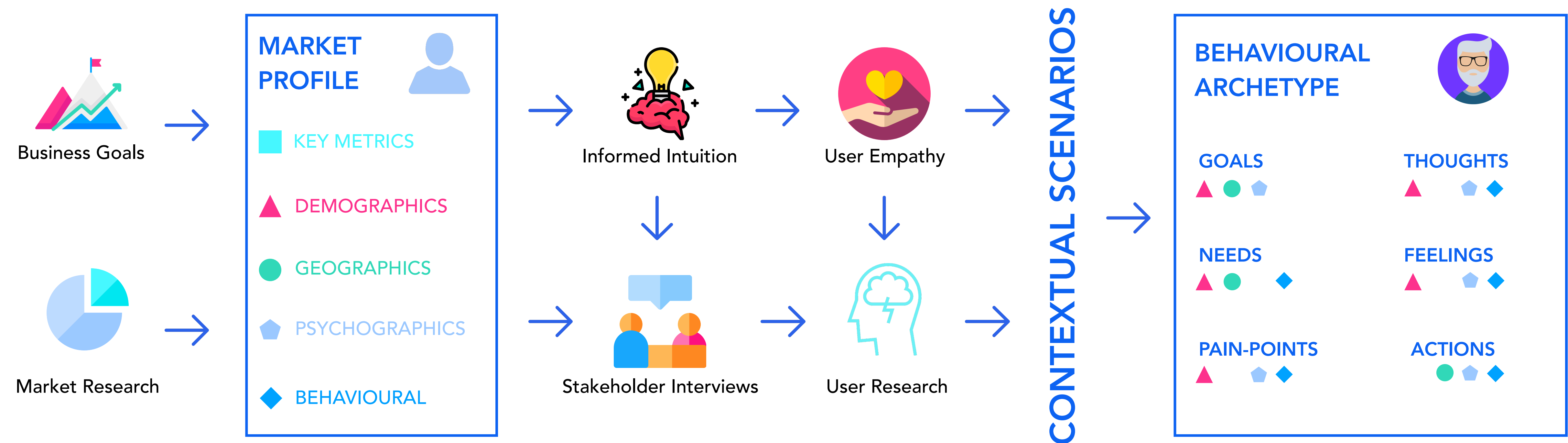
Customer Personas

User Story Map

Product Roadmap

Getting Started

persona overview

Business Goals

Market Research

MARKET PROFILE

- ■ KEY METRICS
- ▲ DEMOGRAPHICS
- ● GEOGRAPHICS
- ⬠ PSYCHOGRAPHICS
- ◆ BEHAVIOURAL

Informed Intuition

Stakeholder Interviews

User Empathy

User Research

CONTEXTUAL SCENARIOS

BEHAVIOURAL ARCHETYPE

GOALS
▲ ● ⬠

THOUGHTS
▲ ⬠ ◆

NEEDS
▲ ● ◆

FEELINGS
▲ ⬠ ◆

PAIN-POINTS
▲ ⬠ ◆

ACTIONS
● ⬠ ◆

defining who your personas are

Elements to consider before we start:

Location: where do people from this persona live?

Age: what is the average age/age range of this persona?

Gender: are people representative of this persona predominantly male or female?

Relationship Status: Single? Married? Children?

Interests: what are the general interests of people in this persona?

Language: what is the primary language used by people in this persona?

Favourite Websites: where do people in this persona go to learn new information?

**Education:** what level of education do they have?

Job Title: what is/are typical job titles for people in this persona?

Responsibilities: what does a typical work day look like for people in this persona?

Frustrations: biggest challenges for people in this persona?

Motivations: what motivates people in this persona to be successful?

Personal/Professional Goals: what do they wish to achieve?
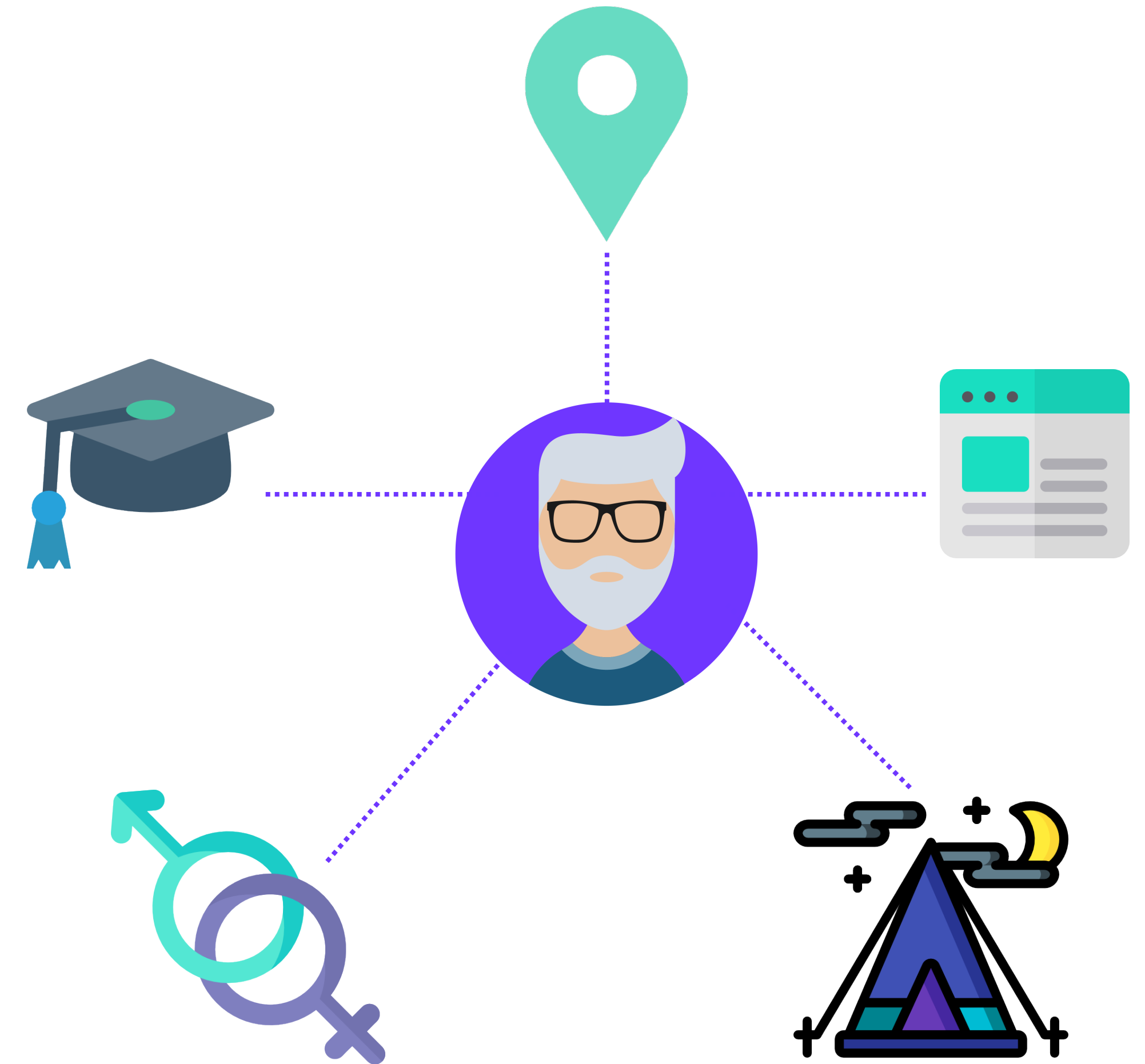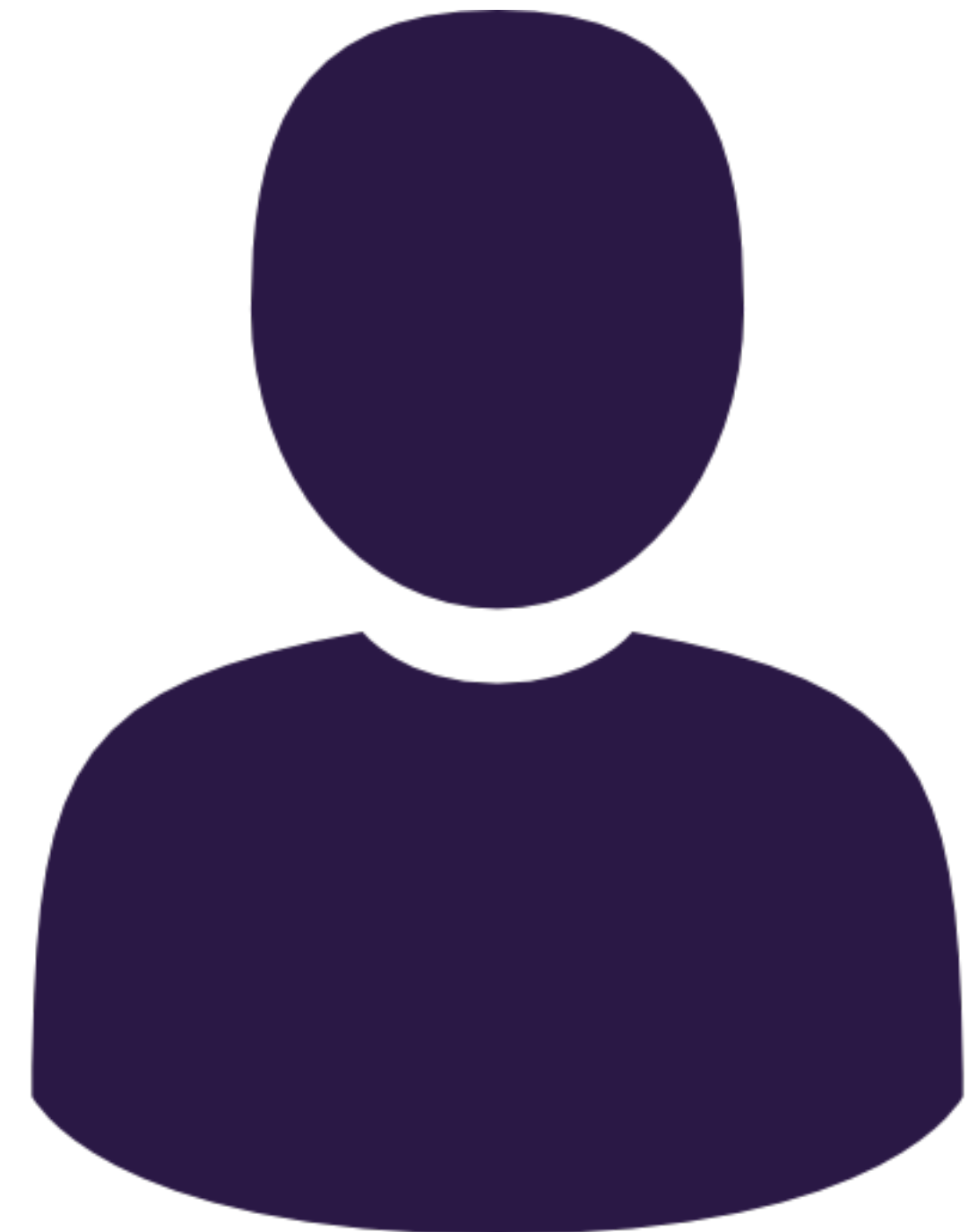
defining who your personas are

Broadly define your personas:

It is not crazy to think that most businesses will have some broad idea of who at least some of their customer personas are (based on customer feedback, support requests, conversations/interviews and initial research) - this is a great starting point, before looking towards analytics to build these personas out into more specific detail

If we took an example of an online menswear retailer, it would be simple to identify two broad potential customer personas

Example: Online Menswear Retailer
- End Consumer - customers purchasing for themselves online
- Wholesale Accounts - wholesale buyers purchasing on behalf of business that will stock the clothes in their own retail stores (online and flagship)

defining who your personas are

Look towards analytics and layer results:

Although personas are fictional representations of your target customers, they are based on qualitative and quantitative data. So where can we find/gather this information?

Places to gather information:
- Google Analytics Audience Reports
- Facebook Insights
- Social Media Listening Tools e.g. Hootsuite, TweetDeck etc.
- Customer Surveys & Polls
- Customer Interviews / Support & Feature Requests *(note: you should have a streamlined way of capturing and sharing this information with your team)*

After gathering all of this information, you'll need to look for commonality between datasets. We start to pull this information together, feeding it into our different personas (yes, you'll have anywhere from 3-5).

Customer Persona Template

persona template

PERSONA NAME

PERSONA IMAGE

AGE: #
OCCUPATION: Job Title
EDUCATION: Qualifications
EXPERIENCE IN ROLE: #
STATUS: Single, Married, Children?
TIER: First Time User
ARCHETYPE: The Realist

"Insert a real customer quote here. Insert a real customer quote here. Insert a real customer quote here. Insert a real customer quote here."

MOTIVATIONS

INCENTIVE

FEAR

ACHIEVEMENT

GROWTH

POWER

SOCIAL

GOALS

Create a list of this persona's goals

Create a list of this persona's goals

Create a list of this persona's goals

RESPONSIBILITIES

Create a list of this persona's daily work responsibilities

Create a list of this persona's daily work responsibilities

Create a list of this persona's daily work responsibilities

FRUSTRATIONS

Create a list of things that frustrate this persona

Create a list of things that frustrate this persona

Create a list of things that frustrate this persona

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