GETTING STARTED

Identifying & Creating Customer Personas
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**

**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 interdisciplinary 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

**PROGRESSIVE**

- Efficient

**EFFICIENT**

- Analytical

**ANALYTICAL**

- Impatient
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.
WORKSHOP

Getting Started
persona overview

MARKET PROFILE
- KEY METRICS
- DEMOGRAPHICS
- GEOGRAPHICS
- PSYCHOGRAPHICS
- BEHAVIOURAL

Business Goals

Market Research

Informed Intuition

User Empathy

Stakeholder Interviews

User Research

CONTEXTUAL SCENARIOS

BEHAVIOURAL ARCHETYPAL

GOALS

THOUGHTS

NEEDS

FEELINGS

PAIN-POINTS

ACTIONS

Source: Smashing Ideas
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**

<table>
<thead>
<tr>
<th>Age:</th>
<th>#</th>
</tr>
</thead>
<tbody>
<tr>
<td>Occupation:</td>
<td>Job Title</td>
</tr>
<tr>
<td>Education:</td>
<td>Qualifications</td>
</tr>
<tr>
<td>Experience in Role:</td>
<td>#</td>
</tr>
<tr>
<td>Status:</td>
<td>Single, Married, Children?</td>
</tr>
<tr>
<td>Tier:</td>
<td>First Time User</td>
</tr>
<tr>
<td>Archetype:</td>
<td>The Realist</td>
</tr>
</tbody>
</table>

**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

**Personality**

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**Technology**

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- Software
- Mobile Apps
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"Insert a real customer quote here. Insert a real customer quote here. Insert a real customer quote here. Insert a real customer quote here."