

# Using Personas to Understand your Customers.

Using personas to design relevant and valuable experiences.



# A Persona should be much more than some faux ideal caricature.

They should be relatable and help you understand your customers' needs, experiences, behaviours and goals. They should help you better understand what products or services would be valuable for them.





# What are Personas?

“Personas put a face on the customer – a memorable, engaging and actionable image that serves as someone to design a product or service for.”

- Proto CX

Personas are fictional profiles, developed as a way of representing a particular group of people based on their shared interests and behaviour.

They provide the ability to look at a service experience from a range of different perspectives.

Enable teams to define and engage the different interest groups that often exist within a segment or target market groups.

Shifts the focus away from abstract demographics and towards the wants and needs of real people.



# The Value of Personas

## Helps organisations become more customer-centric

We tend to design for ourselves (our own behaviour, wants and needs).

Personas helps teams empathise with their customers.

## Simplifies customer understanding

It takes effort to understand people's needs, wants and behaviours.

Personas are visual and digestible representation of the customer.

## Reduces decisions made based on assumptions

We tend to make assumptions about people.

Personas are a quick reference point for every decision-maker.



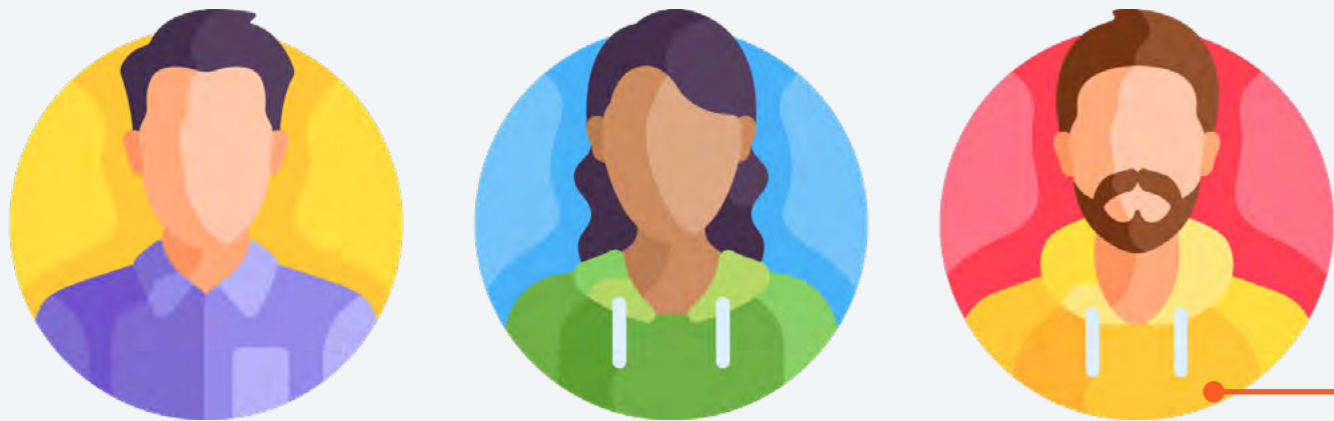


To this . . .

# Customer Segments vs. Personas

From this . . .

“I think it should be like this...”



## Customer Segments

- Generalised vague information
- Overwhelming customer data
- Open to interpretation
- Inspired by data

“I know exactly what our customers want from us and how we go about delivering it to them.”

**Matt and Jessica want you to...**  
Provide good, reliable service that is great value for money and so they can help achieve their long-term saving goals by being rewarding them for their business and loyalty. Be proactive and pleasant in their interactions by responding quickly in a clear and concise way.

**MATT AND JESSICA**  
DUAL INCOME, 8 MONTH OLD BABY GIRL

**AGE & OCCUPATION**  
- Matt, 29, Landscaper  
- Jessica, 27, Receptionist at Local Doctors Surgery

**LOCATION**  
Gold Coast, QLD

**PASSION**  
- Healthy lifestyle  
- Beach, surfing, running  
- Their new baby and enjoying parenthood

**FAVOURITE BRANDS**  
- City Beach - has the wide range of comfortable, but with this style of beach wear, bikinis, boardies, etc.  
- K Mart - great looking homewares at really low prices which Jessica uses to indulge her new passion for home decoration

**TURN ON'S**  
- They expect things to be simple and easy to use  
- Want to be in control of their experience and expect proactive engagement  
- Value knowledgeable staff and the support they can provide  
- Like staff to listen and engage with them

**TURN OFF'S**  
- Staff, self-centered, self-interested people  
- Duty-free people that don't listen to them and understand their needs  
- When people promise to do something and then don't deliver - they don't seem to have to chase up things other people's mistakes  
- Getting unexpectedly high bills as they work extremely hard to balance their household budget

**BACKGROUND**  
- Matt and Jessica are in their late 20s. They moved to Gold Coast in 2015 and their 8-month-old baby girl. They are both employed full-time and have a dual income household. They are both passionate about their health and fitness and are looking for ways to stay active and healthy. They are also looking for ways to save money and are looking for ways to get the most out of their money.

**MY IDEAL PROVIDER SHOULD**  
- Be easy to use and have a simple interface  
- Be proactive and offer helpful advice  
- Be reliable and offer consistent service  
- Be transparent and offer clear pricing  
- Be easy to contact and have a quick response time

**MY INTERACTIONS**  
- I want to be able to interact with your staff in a way that is easy and convenient for me  
- I want to be able to interact with your staff in a way that is helpful and informative  
- I want to be able to interact with your staff in a way that is friendly and personable

**DOMINANT CX PRINCIPLES**

- Be Transparent with Me
- Know Me
- Hear Me
- Make it Easy for Me
- Respond to Me
- Be Fair with Me
- Help me Feel Confident
- Value Me

**VALUE FOR MONEY**  
LOOKS FOR THE CHEAPEST DEAL  
LOOKS FOR NEEDS TO BE MET

**INTERACTION TYPE**  
AND PROXIES  
TAILORED

## Personas

- Personalised and memorable profiles
- Inspires specific, actionable initiatives
- Consistent message
- Inspired by real customers

# The Persona Development Process

## 1. Research

- ▶ Customer Research
- ▶ Voice of the Customer
- ▶ Customer Insights

## 2. Prioritise

- ▶ Insight Interrogation
- ▶ Persona Prioritisation
- ▶ Create persona strategy

## 3. Design

- ▶ Test and refine personas
- ▶ Visualise personas
- ▶ Co-Design personas and build empathy

## 4. Communicate

- ▶ Communicate the value of personas
- ▶ Share personas and guiding principles
- ▶ Train staff on how to leverage personas

## 5. Embed

- ▶ Embed personas in the organisation
- ▶ Use persona studies to inform business decisions
- ▶ Continually refresh personas



# 1. Research

Seek to understand your customers first.



## To develop *worthwhile* personas, some questions you might want to consider...

- What does a day in their life look like?
- What are their pain points?
- What do they value?
- What are their goals and aspirations?
- Where do they go to for help?
- What annoys them?

## To develop *memorable* personas, some questions you might want to consider...

- What is their first, middle and last name?
- When is their exact birthdate?
- What is their address?
- Who do they live with?
- What nationality/background are they from?
- What languages do they speak?
- What is their current job/role?

## To develop *quality* personas, conduct design research such as the following...

- Immersion and Observation
- Shadowing
- Vox Pops
- Contextual Customer Interviews
- Customer Co-Design Workshops
- Customer Surveys
- Call Jacking and more...

# 2. Prioritise

Prioritise and sort your personas and create a Persona Strategy for working teams.

Personas define fundamental qualities and behaviours of a group of customers.

As a rule, you want as few as possible, even if that means segments are overlooked.

The size of your audience and type of brand or product will determine how many personas are needed.

A skate shop will likely need one.

A car model might require two.

A credit card or bank might need up to six.



## FOR CUSTOMER EXPERIENCE

Ability to define and engage different interest groups that often exist within current segment or target market groups.

## FOR MARKETING

Shifts the focus away from abstract demographics and towards wants and needs of real people. Helps marketing teams to focus efforts on real indication of customer communication preferences and styles.

## FOR IT

When building customer-facing IT solutions, using real behaviour and customer preferences to determine usability features.

## FOR PRODUCT

Ability to offer new and improved products and services for different interest groups based on more targeted and detailed customer profiles.





## 3. Design

Use Co-Design and Empathy Workshops to refine personas and gain alignment across the organisation.

### CO-CREATION WORKSHOPS

Co-creation workshops are a fantastic way for your team to co-create personas that represent the various members of each customer.

It's a great way to get everyone on the same page and share some collective experiences around what those customers want and need from your service.

### EMPATHY WORKSHOPS

An empathy workshop can be useful in helping your team understand the different motivations behind what customers are trying to achieve when they interact with your service.

These workshops are run in much the same way as co-creation workshops, but instead, you co-create storyboards that provide an insight into what these customers want.



# 4. Communicate

Communicate the value of personas and train staff on how to leverage them.



**Encourage teams to use personas through...**

- Persona introduction workshops and guides
- Empathy workshops and training
- Share personas via printed and digital artefacts
- Provide quick cheat sheets as well as more in-depth reports
- Ensure personas are easily accessible and available



# 5. Embed

Embed a culture of customer-centricity through the use of personas.

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## Use personas as a reference point.

Keeping personas fresh and updated over time

Use personas to segment your marketing automation database

Organise content marketing efforts by persona

Include personas in meetings

Use personas in design reviews

# Understand your Customers and Grow your Business.

## **Proto Partners**

Get in touch to find out more about how to  
transform Customer Intelligence into Customer Growth.

**+61 02 8379 6600**

**+61 0418 494 489** [damian.kernahan@protopartners.com.au](mailto:damian.kernahan@protopartners.com.au)

