

QUICKIE PERSONA CREATION BY KONNEKT: FIRST STEPS FOR USING PERSONAS IN BUSINESS

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Personas can be an enormously helpful tool for user-centric marketing and product development. **Personas let you think about your customers/users in a more natural way** than raw data by letting you relate to them as a real person instead of in the abstract.

This guide presents an easy way to get started using personas by providing some step-by-step instructions for how to create your first personas. With well-developed personas in place, you will have **a very powerful tool to help make valuable business decisions**. The process we present is best conducted with a small team of people who understand your audience but can also be done alone - just be sure to find some ways to help verify your assumptions (which is why it can be useful to discuss in a group).



One of the most important things to understand is that **personas are inherently imperfect representations of your audience that need to be continually refined with the support of relevant data**. It is essential that any business is collecting data about its customers in whatever way it can manage - from customer surveys and in-store interviews to website stats and social media analytics. You will use this information over time to help verify or correct assumptions you make when further developing your personas. In this way, your personas should become increasingly accurate over time.

Finally, personas are **valuable because they let us think about real people**. It can be difficult at first not to be distracted by the fact that personas may begin as such inexact representations of your customers, but rest assured that they can be valuable even in that initial form. We'll present some of the reasons why later in this document, along with notes on approach, presentation, and data collection.

Definition

Personas are **fictional, research-based archetypes representing users or customers** for marketing, product development, or similar purposes.

Let's look at the two core elements in this definition:

- **Fictional:** personas are not supposed to be based on any specific individual. They are not meant to be exactly one of your users, they are meant to represent (usually a large segment of) your audience in some meaningful way.
- **Research-based:** while your initial personas may be developed with little more than a brainstorming session with you and your team about who your audience is, it is essential that actual research be used (as available) to help verify your personas (which will lead to changes as your personas evolve into richer creations through the additional data).

You may find that some discussions cover multiple elements above, so while you should attempt to be disciplined about how you use these terms, the important thing is that you are thinking specifically about what you're trying to achieve within this overall context.

Why Use Personas?

A couple of the most compelling reasons to use personas are:

- **Easier to understand & constructively relate to a person** as opposed to abstract research. Thinking of a particular person and how their decisions might be affected by other aspects of their personality can help to uncover new approaches and user-focused solutions (for a given situation, try to imagine what Bill the Banker would do compared to trying to imagine what men aged 40-55 making \$100-250k working at banks would do).
- **Focuses decision-making and avoids the “elastic user”**, the common situation where an ill-defined user reference suddenly changes characteristics to fit a certain scenario that is at odds with how they've been defined for another scenario (i.e. you fit the user to whatever you think is best for a given decision instead of vice-versa).

Preparation

This process is meant to **create between one and three distinct personas**. There's no value in having very similar personas if they don't help you make a product or service they'll want more, so you're unlikely to need more than a few personas to represent the majority of your users (and some organizations might need only one).

All of the questions below could be answered off the top of your head but keep in mind that **the more relevant data you use, the more useful your persona** is likely to be. So if you have access to your organization's Google Analytics, social media, or other accounts then use these during this process, and supplement that by any other relevant data you may have access to (see the *More About Your Data* section for some ideas).

This quickie persona creation process is **best performed in a group with post-it notes on a wall or recipe cards on a table** so that you can add, remove, and rearrange all of the elements we'll be discussing. We'll be assuming you're doing your card sorting on a table in the example below, but whatever means you use is fine.

Here are the steps in a nutshell (we'll provide more guidance on the following pages)...

1. **Types** of people who use your products/services
2. **Why** do people use your products/services? (wants)
3. Which **wants** relate to which types of people?
4. Develop 1-3 groups into core personas with **backgrounds**.
5. Expand the personas with details about **goals and concerns**.
6. Compile into **shareable** form.
7. Use for marketing and/or product development **decisions**.
8. **Update**/reverify data/assumptions often.

Process

So, with your pen and post-its at the ready, let's create some personas for your business:

1. **Types of People who use Your Products/Services:** use nouns, e.g. "truck driver" - no wants or needs yet!

*1.1. Write each **Type** of person down on its own card*

*1.2. Arrange the **Type** cards so they are all visible on one side of the table.*

*1.3. Determine if you have any duplicate **Types** and, if so, remove them.*

2. **Why do People use Your Products/Services:** phrase from the person's perspective, e.g. "I want..." or "I need..."

*2.1. Write each **Want**/need down on its own card.*

*2.2. Arrange the **Want** cards so they are all visible on the other side of the table.*

*2.3. Determine if you have any duplicate **Wants** and, if so, remove them.*

3. **Which Wants** (cards from Step 2) **relate most strongly to which Types** (cards from Step 1) **of People:** noting different Types may have the same Wants.

*3.1. Beside each **Type** of person on one side of the table, put any **Want** cards that relate to them from the other side of the table (this may mean you have to duplicate some Want cards if multiple Types share those Wants).*

*3.2. Do any of the **Types** share most or all of the same **Wants**? If so then consider eliminating them as redundant personas until you have only one, two, or three proto-personas that you'll develop in the next steps (and who you think can represent a majority of your audience). As with everything about personas, it may be that these change in the future, but the goal for now is to make a decision about which personas would most effectively represent the majority of your users.*

4. **For each of the remaining Types/Proto-Personas, take their Wants and develop that Type into a distinct Persona** with additional attributes including...
 - 4.1. *Job Title (don't worry about being exact right now)*
 - 4.2. *Demographic Info (be specific, no ranges, etc. - it's a person, not a group)*
 - 4.3. *Background (start short)*
 - 4.4. *Technical Knowledge (if relevant)*
5. For each of these **Personas, expand them with the following** elements...
 - 5.1. *Goals (what are they trying to achieve)*
 - 5.2. *Concerns (what are they worried about)*
 - 5.3. *Quotes (how would they verbalize what they need in relation to your product)*
6. **Compile this information into a shareable Persona** and map any research data you have to justify the persona (see *What Should Personas Look Like* in the next section).
7. **Use your personas to help you make decisions** related to marketing and product development: will Bill like this content? Are we solving Jane's needs with this service?
8. **Continually adapt and refine your personas** (and update the associated research) as you prove/disprove your assumptions.

What Should Personas Look Like?

Personas take many different forms depending on what they're being used for and by whom, but you can start simple with the **shareable persona form presented on the next page**. A separate copy of this form should be kept with footnotes outlining the data that support the various information for the persona. It is important that you don't use this version for decision-making not involved in improving the personas, as you don't want the supporting data to become the focus (have another meeting aimed at improving your personas if that's the goal).

a simple persona example

*persona
headshot
(try Google
Image search)*

RANDY THE RESEARCHER

Chief Data Researcher

Age: 39 **Location:** Miami, FL **Education:** B.Sc. Computer Science

Background: Randy... *(needs enough details to help you imagine how he might make decisions - don't get too lost in the details).*

Goals: *This section should list some of the key things Randy is trying to achieve relative to using your product or service.*

Concerns: *This section should list what might have Randy frustrated or concerned about trying to reach his Goals.*

Quotes: "I just want to know I can get tech support for my software on the phone before the end of the day."

More About Your Data

There are many, many ways you can get customer/member/user insights but we thought we'd share a few with you in case you needed a start:

- **User/Customer Interviews** (a near-essential ingredient to develop great personas)
- **User/Customer Surveys** (and polls and similar feedback mechanisms)
- **Web-based Analytics** (from Google, social media, etc.)
- **Customer Service Information** (e.g. staff interviews, review discussions, etc.)
- **Market Research** (anything to support what you already believe)
- and whatever else you think might be relevant in forming an accurate picture of the wants, needs, and motivations of your customers.

Next Steps

Personas can be a fantastic and empowering tool to help you make better, audience-focused decisions in your marketing and product development. As noted, it is important to regularly verify your assumptions by rechecking the most up-to-date data and what you think it's saying about your personas. **As time proceeds, so should your personas evolve.**

Keeping up-to-date with your audience data and **translating this information into a form that helps you achieve success is an ongoing effort.** Persona development shouldn't end once the original personas are created. Just as SEO doesn't end once you've done some on-page optimization, and just as your website shouldn't cease evolving and adapting after it's launched.



The world is more competitive than it's ever been but, thankfully, we also have **more tools and technology to enable us to be competitive than we've ever had before.** Konnekt has partnered with organizations large and small, from businesses to governments and NGOs, and across three continents for almost a decade to help our clients succeed online.



By designing, developing, and optimizing effective digital infrastructure, online campaigns, and content for your organization, **Konnekt lets you focus on your business decisions** by providing clear and action-oriented reporting, a self-managing array of digital services, guidance you can trust, and results you can depend on.

Whether it's **web development, digital marketing strategy & tactics, social media planning, or digital campaigns,** Konnekt can help you grow your customer base, increase your sales, and have your message heard.

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What We Do

Konnekt is a digital agency that empowers organizations to meaningfully engage their audiences online.

STRATEGY & EXECUTION

- ▶ Audience Engagement
- ▶ Content, Platform, & Resourcing Strategies
- ▶ Campaign Development & Influencer Outreach
- ▶ Community Management & Monitoring
- ▶ Research & Analytics

DEVELOPMENT & PRODUCTION

- ▶ Web Design & Development
- ▶ Video Production
- ▶ Copywriting & Creative

CAPACITY BUILDING

- ▶ Executive Coaching
- ▶ Training, Speaking, & Presentations

USER EXPERIENCE & PRODUCT REFINEMENT

- ▶ Concept Development
- ▶ Heuristic Usability & Process Reviews
- ▶ Online Customer Feedback

How We Do It

Konnekt maintains a constant focus on creating exceptional digital experiences while producing measurable outcomes and timely deliverables.

FOUNDATIONAL CONSIDERATIONS

- ▶ Goals/Purpose (what do we want to accomplish)
- ▶ Brand (who is it being accomplished for)
- ▶ Audience (with whom are we interacting to accomplish this)

ENVIRONMENTAL CONSIDERATIONS

- ▶ Touchpoints (in what ways does the audience interact with the brand)
- ▶ Platforms (on which platforms do/should the audience and brand interact)
- ▶ Resources (what resources do we have to work with)

PRODUCTION/DEVELOPMENT CONSIDERATIONS

- ▶ Messaging (what do we want to say)
- ▶ Content (what do we want to share)
- ▶ Technologies (how and where do we want to share it)

EXECUTION/MANAGEMENT CONSIDERATIONS

- ▶ Planning (how are we going to do this)
- ▶ Execution (doing it)
- ▶ Reporting (what have we accomplished & next steps)