Put Your Personas to Work!

#workingpersonas

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August 22, 2013
# Agenda

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>09:00 - 09:15</td>
<td>Introduction</td>
</tr>
<tr>
<td>09:15 - 10:05</td>
<td>Part 1: <strong>Generate Ideas</strong></td>
</tr>
<tr>
<td>10:05 - 10:50</td>
<td>Part 2: <strong>Evaluate Fit</strong></td>
</tr>
<tr>
<td>10:50 - 11:00</td>
<td>Break</td>
</tr>
<tr>
<td>11:00 - 11:50</td>
<td>Part 3: <strong>Humanize the Journey</strong></td>
</tr>
<tr>
<td>11:50 - 12:20</td>
<td>Part 4: <strong>Integrate Views</strong></td>
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<tr>
<td>12:20 - 12:30</td>
<td>Wrap and Q&amp;A</td>
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*Duration: 15 min, 50 min, 45 min, 10 min, 50 min, 35 min, 10 min.*
GENERATE IDEAS
Focus product, service, and feature ideation around the needs and goals of your intended audience
**GENERATE IDEAS**
Focus product, service, and feature ideation around the needs and goals of your intended audience

**EVALUATE FIT**
Assess how current and future product and service elements map to your audience
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EVALUATE FIT
Assess how current and future product and service elements map to your audience

HUMANIZE JOURNEYS
Understand individual experience for the overall journey and at key points along the way
GENERATE IDEAS
Focus product, service, and feature ideation around the needs and goals of your intended audience

EVALUATE FIT
Assess how current and future product and service elements map to your audience

INTEGRATE VIEWS
Create organizational buy-in by mapping personas to market segments and institutional understanding

HUMANIZE JOURNEYS
Understand individual experience for the overall journey and at key points along the way
1. **Generate Ideas**
   Focus product, service, and feature ideation around the needs and goals of your intended audience.

2. **Evaluate Fit**
   Assess how current and future product and service elements map to your audience.

3. **Humanize Journeys**
   Understand individual experience for the overall journey and at key points along the way.

4. **Integrate Views**
   Create organizational buy-in by mapping personas to market segments and institutional understanding.
Let’s level set.

- Why personas?
- What’s a persona?
- How might it look?
- How might it be used?
WHY PERSONAS?
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Personas provide a common language for communicating about users, their needs and the ways in which they differ.
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They’re great for informing strategy and design decisions at multiple stages of product (and service) ideation and development.
WHY PERSONAS?

Personas provide a common language for communicating about users, their needs and the ways in which they differ.

They’re great for informing strategy and design decisions at multiple stages of product (and service) ideation and development.

They can help to define and prioritize features and functionality relative to user needs — and help to assess the likelihood of adoption or engagement by target audiences.
The best personas are an outcome of qualitative field research.
The best personas are an outcome of qualitative field research.

They embody what we learn about the needs, motivations, and behaviors of real people.
# Research Methods and Outputs

<table>
<thead>
<tr>
<th>Type of Inquiry</th>
<th>Method</th>
<th>Application/Result</th>
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<tbody>
<tr>
<td><strong>Demographic</strong></td>
<td>Surveys, Database analysis</td>
<td>Lay of the land, Audience segmentation, Inform/validate other research</td>
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<tr>
<td></td>
<td></td>
<td><strong>Behavioral</strong></td>
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<td></td>
<td>Field research, Contextual interviews, Card sorting, Prototype testing &amp; iteration</td>
<td><strong>Motivational</strong></td>
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<td></td>
<td></td>
<td><strong>Evaluative</strong></td>
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<tr>
<td><strong>Who are they?</strong></td>
<td></td>
<td>Age, sex, geography</td>
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<tr>
<td><strong>How do things get done?</strong></td>
<td></td>
<td>Behavior patterns, conceptual models</td>
</tr>
<tr>
<td><strong>Why are they doing it?</strong></td>
<td></td>
<td>Goals, emotions, preferences, desires</td>
</tr>
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<td><strong>How does it work for them?</strong></td>
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<td>Features and functions</td>
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<td>Visual interpretation</td>
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<td>Usability testing</td>
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<td>Interaction flow</td>
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<td>Page layout</td>
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Elements of Good Personas

**CORE IDENTITY**
Background, goals, motivations, and attitudes or behaviors that distinctly represent the persona

**NEEDS & CHALLENGES**
What this persona needs to accomplish goals, as well as unmet needs, obstacles, and pain points

**CURRENT EXPERIENCE**
How this persona lives or works today, who they interact with, and relevant activities, tools, or information sources

**THEMES & INSIGHTS**
Representative scenarios or themes that illustrate how this persona feels, interacts, or behaves
"I take an independent approach to investing, built on deep market knowledge and my own analysis."

Philip

Philip’s unique market perspective and investment philosophy are supported by his own rigorous analysis. From his perspective, the adviser is the brand, his clients recognize his deep expertise and insight in the carefully crafted portfolios he assembles for them.

GOALS & MOTIVATIONS

- Being sought out by clients for his ability to deliver based on market insight and portfolio building approach
- Independence and autonomy around portfolio planning and investment selections
- Going to the next level in AUM by continuing to add wealthy clients and managing more of their money

BEHAVIORS

- Synthesizes opinions and investment strategy through deep research and market analysis
- Seeks out independent market analysis and perspective; depends on a small set of proven sources
- Applies a highly analytical, independent, and hands-on approach to analyzing and planning
- Demands independence around investment selection and planning
- Looks for information that keeps him on the cutting edge of investment products, including less traditional options

RELATIONSHIPS

- MF companies need to prove themselves to him and overcome his skepticism toward them
- MF companies should have limited relationships with investment and let him be in charge
- "If clients are those that keep him informed of events in their lives"

KEY INFLUENCERS:

- Select fund managers and companies that repeatedly demonstrate insight and performance
- Trusted fund reps and third-party financial analysts whose insights inform his philosophy

TOOLS & TECHNOLOGY

- He’s proficient with technology, but it doesn’t define him or what he offers as an adviser and planner
- Excel supports custom formulation of investment approaches and "what if" analyses, comparison of mutual funds

TECH PROGRESSIVENESS

- Technology plays a supporting role for him, enabling a broad range of research and administrative work

PERSONA FORM FACTORS

From large wall posters to 3x5” cards, and even easels, personas can be used in a variety of formats depending on the objective.

Large personas have all the detail and are best for more detailed work.

Card-sized personas are great for quick reference or for use with activities like the ones we’ll try out today.
Elements of Good Personas: Key Differentiators

- **Openness to New Experiences**:
  - Resists change
  - Open, needs to be convinced of benefits
  - Open, but not actively seeking
  - Explores new things

- **Tech Progressiveness**:
  - Laggard
  - Late majority
  - Early majority
  - Early adopter
  - Pioneer

- **Attitude Toward MF Companies**:
  - Skeptical
  - Open, but on adviser’s terms
  - Open, if on approved list
  - Open, not soliciting help
  - Dependent on for info

- **Client Approach**:
  - Emotional
  - Functional
  - Intellectual

**THE EXPERT**
**THE CONDUIT**
**THE PRACTICE BUILDER**
**THE RELATIONSHIP BUILDER**
**THE COUNSELOR**
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THE RELATIONSHIP BUILDER
THE COUNSELOR
Elements of Good Personas: Attitudes & Personality

THE EXPERT

THE CONDUIT

THE PRACTICE BUILDER

THE RELATIONSHIP BUILDER

THE COUNSELOR
Any questions?
Today’s inputs

- The client
- The personas
ACME
Toys & More!

COMPANY BACKGROUND

- Nationally recognized retail brand
- Focused on toys and products for kids
- Known for its great in-store experience
- Founded 1952; online since 2001
- Website last updated 2008
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ONLINE CHANNEL OBJECTIVES

- Bring ACME’s in-store magic online
- Attract new customers
- Increase repeat visits
- Increase conversion
Melissa
The Practical Provider
Melissa is oriented towards grandkids’ education and creativity. She’s driven by and enjoys supporting their academic success.

Jessica
The Producer
Jessica loves to plan and manage events for the kids and the whole family. She’s driven to plan and host events and activities for the kids.

Susan
The Director
Susan is a household visionary who likes to stand out from the crowd. She works steadily to fulfill her vision of home and family.

Angie
The Kid at Heart
Angie is driven by own sense of play. She loves to engage with the kids, and is always looking for new kids’ toys, clothes, and activities.

Francis
The Indulger
Francis sees parenting as providing whatever the kids want. She’s a spontaneous buyer who likes to frequently reward the kids.
Personas

- The Director
- The Practical Provider
- The Producer
- The Indulger
- The Kid at Heart
Just one more thing...
In the real world ...
In the real world ...

you would ...

- workshop these methods with a lot of people
- involve multiple departments, roles, and perspectives
- spend more time on an activity (half day or more)
- employ multiple (or all) activities
- mix and match, modify — and invent your own!
In the real world ... you would ...

- workshop these methods with a lot of people
- involve multiple departments, roles, and perspectives
- spend more time on an activity (half day or more)
- employ multiple (or all) activities
- mix and match, modify — and invent your own!

and, of course, you’d also ...

- be working with research-based personas
- know the personas very well
- have additional research-based user insights
Logistics for today
Logistics for today

Each table is a team

Go, team!
Logistics for today

Each table is a team

Each team works with a single persona
Logistics for today

Each table is a team

Each team works with a single persona

Team members discuss ideas and do activities together
Ready?
Here’s Wyatt!
Part 1:

Generate Ideas

Focus product, service, and feature ideation around the needs and goals of your intended audience
Ever experience this?
I have a great idea!

I know just what this needs!

Well, I would like it to ...

This is a product for everybody!

Hm ... nevermind, that won't work for people in Japan...

When my wife goes shopping ...
A Typical Approach to Generating Ideas
Generating Ideas with Personas

1

2

3
Product and service ideas can come from a lot of places.

Deeply addressing the needs of specific archetypes allows us to arrive at a richer set of ideas and concepts that assure adoption and engagement.

Personas help us generate focused product and service ideas around real people and their real situations and needs.
EXERCISE 1

ACME Strategic Objectives

1. Bringing in-store magic to the online experience
2. Attracting new customers
3. Increasing existing customer engagement
4. Increasing repeat visits
5. Maintaining / increasing conversion
6. Cross- and up-selling products
7. Interconnecting physical and online channels
EXERCISE 1

Generate Mobile App Ideas (30 min)
EXERCISE 1

Generate Mobile App Ideas (30 min)

1. Spend some time getting to know your persona (10 min)
EXERCISE 1

Generate Mobile App Ideas (30 min)

1. Spend some time getting to know your persona (10 min)
2. Individually, brainstorm app ideas for your persona (10 min)
   - Reference ACME’s business objectives, but think broadly
   - Generate ideas and write them on stickies; 1 idea per note
EXERCISE 1

Generate Mobile App Ideas (30 min)

1. Spend some time getting to know your persona (10 min)
2. Individually, brainstorm app ideas for your persona (10 min)
   - Reference ACME’s business objectives, but think broadly
   - Generate ideas and write them on stickies; 1 idea per note
3. As a group, look over your pile of ideas (10 min)
   - Discuss ideas with other group members
   - Identify, cluster, and label themes
Show & Tell!
(10 min)
Part 2: Evaluate Fit

Assess how current and future product and service elements map to your audience
Feature rationale comes from many sources
Feature rationale comes from many sources

“It’s a business initiative!”
Feature rationale comes from many sources

“It’s in the strategic roadmap!”
Feature rationale comes from many sources

“It’s in the product requirements document!”
Feature rationale comes from many sources

“Our competitors are doing it!”
Feature rationale comes from many sources

“It’s a competitive advantage!”
Feature rationale comes from many sources

“My mom would totally use this!”
Feature rationale comes from many sources

“It’s something a product manager thought up, and engineering loved it, so it’s in!”

(But we’re not sure what it is or who would use it.)
Feature rationale comes from many sources

“It’s something we identified through a generate ideas exercise we tried out!”
feature
feature
feature
feature
feature
feature
Imagine if we had a tool to...
Imagine if we had a tool to...

 ✓ see the big picture of product appeal or suitability
Imagine if we had a tool to...

✓ see the big picture of product appeal or suitability

✓ map features and capabilities to the target audience
Imagine if we had a tool to...

✓ see the big picture of product appeal or suitability

✓ map features and capabilities to the target audience

✓ see relative value of features by user type
Imagine if we had a tool to...

✓ see the big picture of product appeal or suitability
✓ map features and capabilities to the target audience
✓ see relative value of features by user type
✓ show gaps in supporting or meeting user needs
Imagine if we had a tool to...

✓ see the big picture of product appeal or suitability
✓ map features and capabilities to the target audience
✓ see relative value of features by user type
✓ show gaps in supporting or meeting user needs
✓ evaluate a range of features — current or planned!
Persona-based Feature Evaluation
Persona-based Feature Evaluation

- feature ✓
- feature ✗
- feature ✓
- feature ✗
- feature ✓
- feature ✗
# A Basic Matrix

<table>
<thead>
<tr>
<th>Feature</th>
<th>A</th>
<th>B</th>
<th>C</th>
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<tbody>
<tr>
<td>Feature X</td>
<td>✓</td>
<td>✓</td>
<td>x</td>
</tr>
<tr>
<td>Feature Y</td>
<td>✓</td>
<td>✓</td>
<td>x</td>
</tr>
<tr>
<td>Feature Z</td>
<td>x</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
## The Persona Fit Matrix

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feature X</td>
<td>2</td>
<td>2</td>
<td>-1</td>
</tr>
<tr>
<td>Feature Y</td>
<td>2</td>
<td>0</td>
<td>-1</td>
</tr>
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<tr>
<td>Feature Z</td>
<td>0</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Feature/Capability</td>
<td>Financial Plan</td>
<td>Optimization</td>
<td></td>
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<tr>
<td>-------------------</td>
<td>----------------</td>
<td>--------------</td>
<td></td>
</tr>
<tr>
<td>2 Purchase, exchange, rebalance</td>
<td>-1</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>3 Adviser/Investor collaboration</td>
<td>0</td>
<td>Allow tool to be branded by the Adviser</td>
<td></td>
</tr>
<tr>
<td>4 Find and AF Adviser</td>
<td>1</td>
<td>Tool is intelligent enough to present him as a suggested Adviser to his ideal client profile</td>
<td></td>
</tr>
<tr>
<td>5 Education content</td>
<td>0</td>
<td>Educational material is heavily data driven</td>
<td></td>
</tr>
<tr>
<td>6 AF Customer</td>
<td>2</td>
<td></td>
<td></td>
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</table>
The persona fit matrix helps us see the big picture of product or service appeal, suitability, and gaps.

It provides perspective for broader teams and a strong foundation for making informed decisions about what to keep, improve, or omit.
EXERCISE 2

Planned ACME Features

1. Shopping & Wish Lists
2. Rich Product Descriptions
3. Product Reviews & Ratings
4. Related Products & Pairings
5. Expert Reviews
6. Toy of the Month Club
7. Promotions & Rebates
8. Find in Store
ACME’s Web Feature Set

ACME
Toys & More!

Planned ACME Website Features

1. **Shopping & Wish Lists** — Tools that help parents keep track of desired products for near- and long-term purchase. Includes ability to tie products to specific dates such as birthdays.

2. **Rich Product Descriptions** — Detailed product descriptions and specifications, plus high-resolution images and multiple images or views for each product.

3. **Product Reviews and Ratings** — Customer-generated product comments and reviews, and product ratings on 1 – 5 “star” scale.

4. **Related Products & Pairings** — A way to surface related products (similar and alternative items) and show additional products, including “complete the set” functionality.

5. **Expert Reviews** — Curated product reviews by ACME staff and invited experts, this is additional “product description” content that educates and approximates the in-store customer service experience.

6. **Toy of the Month Club** — A way to keep the fun coming all year long, monthly delivery of toys at differing price points and targeted to individual child age(s).

7. **Promotions and Rebates** — Notification of sale pricing, rebates, and closeouts for items in shopping and wish lists.

8. **Find in Store** — Product specific inventory checking for local in-store availability, and a list of nearby stores that have it.
EXERCISE 2

Evaluate Fit (25 min)
Evaluate Fit  (25 min)

1. Review the ACME feature list, and place feature cards in 1st column of the feature-fit matrix by number. (5 min)
EXERCISE 2

Evaluate Fit (25 min)

1. Review the ACME feature list, and place feature cards in 1st column of the feature-fit matrix by number. (5 min)

2. Discuss and rate each feature according to value you feel it has for your persona. Put these in the 2nd column. (10 min)
EXERCISE 2

Evaluate Fit  (25 min)

1. Review the ACME feature list, and place feature cards in 1st column of the feature-fit matrix by number. (5 min)

2. Discuss and rate each feature according to value you feel it has for your persona. Put these in the 2nd column. (10 min)

3. Address the three lowest-rated features by discussing and noting opportunities for making them better for your persona. Write this in the 3rd column. (10 min)

FIT SCALE

-1 barrier  0 neutral  1 some value  2 ideal / high value
EXERCISE #2

Show & Tell!
(10 min)
Part 3: Humanize Journeys

Understand individual experience at key steps in an overall journey
The Visitor Journey
Where do you support the paths of different visitors?

GET THE IDEA | PLAN THE DAY | GET INSIDE | DO THE MUSEUM | WHAT'S NEXT | RETURN TO LIFE
--- | --- | --- | --- | --- | ---
Local Adult
- Discovers Exploratorium on travel site
- Discusses with hotel concierge

Tourist
- Plans day around visiting multiple tourist destinations
- Talks with family about going
- Learns about Spanish options
- Considers cost deeply

Hispanic Family
- Heard about Exploratorium on UTVision
- Unsure if it’s the right place for them
- Seeks Spanish support
- Needs to keep family together; old and young

Member Family
- Is triggered by fond memories
- Receives Exploratorium communications
- Looks up member benefits
- Seeks special member check-in or benefits

- Needs alcohol
- Buzzed and wants munchies

- Feels pleased at the depth of the content
- Pleasantly surprised that translation is free

- Feels pride and belonging
- Looks for favorite exhibit
- Feels frustration if it isn’t there

- Wants to continue social activities for the night
- Reviews on Trip Advisor
- Shares photos with family

- Seeks spot to rest and recharge
- Gather the troops
- Wants to get more involved

- Plans another date
- Crashes in hotel
- Seeks flights to other cities

- Feels proud of San Francisco
- Feels involved
- Wants to get more involved
# The Visitor Journey
What opportunities exist to impact the experience at scale?

## Pre-visit
- **Marketing**
- **Digital Media**
- **Grounds**
- **People**
- **Transit**
- **Arrival & Entry**

## At Exploratorium
- **Orientation**
- **Mobile Device**
- **Places to Go, Things to See**
- **People**
- **Retail**
- **Exit**

## Post-visit
- **Digital Media**
- **People**

### Touch Points
- **Pain Point**
  - No awareness
  - Too many other options
- **Highlight**
  - Standalone online experience

### Plan the Day
- **Pain Point**
  - Too long a wait
  - Too many people
  - Can't get inside
  - How can I find my friends?

### Get the Idea
- **Highlight**
  - Sense of welcome
  - Surprise and newness

### Get Inside
- **Pain Point**
  - Too much to deal with
  - Crowded, too loud
  - Low blood sugar
  - What do I do first?

### Do the Museum
- **Highlight**
  - Amazing exhibits and programs
  - Sense of wonder
  - “I didn’t know that!”
  - Stunning view
  - Fun question: “Are they tricking me?”
  - Alcohol for local adults at evening events

### What’s Next
- **Pain Point**
  - Post-visit bar must
  - No attempt to keep visitors connected
  - Weather and cold
  - No obvious place to relax and refuel

### Return to Life
- **Highlight**
  - The recap: “That was cool”
  - “I wish I had known.” (Free day, closed, etc.)

### Visitor Perspectives
- **Co-marketing with businesses and educational institutions**
- **Tailored e-tickets plans**
- **Educational campaigns**
- **Clear indication of learning resources vs. marketing on website**
- **Clear wayfinding signage outside, as well as inside the building**
- **Mobile app for purchasing tickets and learning about real-time events**
- **Expedited entrance for members and those who purchase tickets via app**
- **Explaners or mobile exhibits in line**
- **Welcome packet**
- **Hospitality**
- **Simple entry & orienteering**
- **Gifting opportunities through the store**
- **Tailored Explainers for language, age, etc.**
- **Artifacts of tinkering and interacting with exhibits (photos, etc.)**
- **Multi-touchpoint exhibits include physical and digital interactions that extend pre and post-visit**
- **“Leave your mark” (digital and physical opportunities for visitors to share and comment).**
- **“Good-byes” to guide visitors through the exit**
- **Exit activities and prompts (game cards, useful take-aways)**
- **Retention program**
- **Exhibit follow-up and discussions**
- **Email insights from exhibit interactions**
- **You may also like** suggestions via email
Customer Journey Map

A specific journey

Experience Map

A generalized experience
Persona Based Experience Map
Maps show aggregate experience over time, but it’s important to evaluate what happens at a human level.

Personas help us to understand how individual experience is affected over time based on specific needs, goals, and attitudes.

Personas also highlight key points that may be improved — and how.
ACME Web Experience Map

**Activities**

- **Search**
  - look for products using keywords
  - explore via product categories
  - look at search results
  - pick a product to view in detail

- **View**
  - look at product photos
  - read product description
  - evaluate product fit
  - put product in cart

- **Purchase**
  - review cart contents
  - start the checkout process
  - ship products

**Pain Points**

- categories are not well organized or segmented
- the number of categories is overwhelming
- search results are too broad
- search filters are too generic to be useful
- can’t find items by event or occasion
- can’t always figure out what’s on sale

- no way to compare products
- product descriptions are too slim and lack detail
- product detail page has few photos; photos often can’t be enlarged
- hard to see proof of quality and value
- products can be added to cart, but there’s no wish list or “save for later” functionality

- the checkout process has too many steps
- forms have a lot of fields, and it’s unclear why some are required
- many people who make it this far abandon cart
- customers would like to buy online and pick up in local store but it’s not offered
EXERCISE 3

Humanize Journeys (30 min)
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1. In the top row, describe your persona’s goals for each stage in the experience (10 min)
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Humanize Journeys  (30 min)

1. In the top row, describe your persona’s goals for each stage in the experience (10 min)

2. In the second row, describe how ACME can help your persona achieve her goals for at each stage (10 min)

3. Step back, think about the points in-between, and tie it all together into a cohesive story that describes the ideal experience for your persona (10 min)
EXERCISE #3

Show & Tell!
(10 min)
Part 4: Integrate Views

Create organizational buy-in by mapping personas to market segments and institutional understanding
ABOUT MARKET SEGMENTS...

IN MARKET RESEARCH TERMS, YOU BELONG TO THE “TECHNO GEEK” SEGMENT.

YOU’RE SHY, BORING, GULLIBLE AND MALE. YOU PREFER COMPUTERS TO PEOPLE. THERE’S ALWAYS A SPIDER ON YOUR ARM.

MADE YOU LOOK.
What kind of car do they drive?

What's their annual salary?

How old are they?

But ... how do I use this for marketing?

What age band do they fall in?

What about life stage?

This work will never be accepted if the personas don't include market segment information!

Where do they live?

What about distribution channel?

What kinds of soft drinks do they like?

Does this meeting include lunch?
SO WHAT?
SO WHAT?

Segments that are useful to marketing may not be meaningful differentiators or guides for product strategy and design.
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Segments that are useful to marketing may not be meaningful differentiators or guides for product strategy and design.

That’s usually because segments don’t map cleanly — or at all — to how people behave, think, or act.
SO WHAT?

Segments that are useful to marketing may not be meaningful differentiators or guides for product strategy and design.

That’s usually because segments don’t map cleanly — or at all — to how people behave, think, or act.

Our objective: Help everyone understand how personas fit with what they know.
## PERSONAS

### PERSONA-SEGMENT MATRIX

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## PERSONAS

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**Cross-maps Perspectives**
Maps personas directly and visibly to the segments used and trusted by the company.

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## PERSONAS

### PERSONA-SEGMENT MATRIX

**Cross-maps Perspectives**
Maps personas directly and visibly to the segments used and trusted by the company.

**Makes Clear Connections**
The mapping is very explicit and help everyone make connections between the personas and what they know.

**Drives Conversation**
It helps people talk about similarities and differences that help them see the role of personas.

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SURE, BUT WHAT ABOUT OVERLAPS?

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### Personas - Persona-Segment Matrix

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Less likely → More likely

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**Note:** The matrix represents the segmentation of personas based on broker dealer type, specialization, and fee type. Each segment is color-coded to indicate the likelihood of each persona belonging to that segment.
<table>
<thead>
<tr>
<th>Broker Dealer Type</th>
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**PERSONA-SEGMENT MATRIX**

Shows likelihood and degree
The dot size relates to the likelihood of finding that person in a given segment, from more likely to less likely.
PERSONA-SEGMENT MATRIX

**Shows likelihood and degree**
The dot size relates to the likelihood of finding that person in a given segment, from more likely to less likely.

**It’s a working approximation**
It’s not a precise or scientific correlation — but it’s a very useful interpretation based on research data and findings.

<table>
<thead>
<tr>
<th>SEGMENTS</th>
<th>Philip</th>
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Less likely ↔ More likely
Persona characteristics and market segments and rarely map 1:1.

In fact, individual characteristics often map to multiple market segments — and to varying degrees!

Cross-mapping requires correlation, and **correlation** requires **interpretation**.
ACME Market Segments

1. Life Stage:
   Non-parents | Parents | Grandparents

2. Marital Status:
   Married / Partnered | Single

3. Annual Household Income:
   < $50K | $50-100K | > $100K

4. Customer Type:
   Brand Driven | Value Driven | Frequent Shopper
   Occasional Shopper | Sale-only Shopper
EXERCISE 4

Integrate Views (15 min)
Integrate Views (15 min)

1. Place ACME’s segments in the first column of the segment-persona matrix (2 min)
Integrate Views (15 min)

1. Place ACME’s segments in the first column of the segment-persona matrix (2 min)
2. In the second column, use stickies of varying sizes to represent extent to which your persona maps to each segment (13 minutes)
EXERCISE #4

Show & Tell!
(5 min)
That was fun!
Questions?
Stay in touch!

**Maria Cordell**
maria@adaptivepath.com
@mordell
flickr.com/mcordell

**Wyatt Starosta**
wyatt.starosta@gmail.com
@wyattstarosta