



PERSONAS AND THE CUSTOMER EXPERIENCE

A HOLISTIC APPROACH

A GUIDE ON BUILDING
USER PERSONAS,
SYSTEM PERSONAS, AND
MARKETING PERSONAS

CONTENT

What Are User Personas, and Why Use Them?	2
What Is an IVR System Persona, and Why Create One?	9
What Is a Marketing Persona, and Why Create One?	14
What Makes Up a Good Persona	17
Work with an Experienced Partner to Develop Your Personas	20

A GOOD CUSTOMER EXPERIENCE DEPENDS ON PERSONAS

Companies invest significant time and money developing communication platforms with their customers — be they proactive such as marketing campaigns, or reactive like a website. Our clients often ask for tools to make sure these investments resonate with their customers, reflect their brand, and deliver the right message.

Our answer usually begins with a discussion of personas: user personas, system personas, and marketing personas. While none of these concepts are new, they are occasionally confused and often neglected.

To provide a good customer experience (CX), you need to understand the needs and preferences of the various customer/user segments you cater to and tailor your interactions accordingly. Despite the fact that every user is unique, certain groups share characteristics such as age, culture and reason for using your product or service. These shared characteristics lend themselves to the creation of personas: archetypal users that represent certain customer groups and can be leveraged to optimize customer interactions.

In the following sections, we'll take a closer look at user personas, system personas and marketing personas.



WHAT ARE USER PERSONAS, AND WHY USE THEM?

A user persona is a fictional person created to represent a certain customer segment. When designing speech-recognition applications, user personas [1] — also referred to as “caller archetypes” — are a means to instill the voice of the user into the design of a product or service. At PTP, it’s our experience that user personas are powerful tools that help ensure a design meets the needs and desires of actual customers. These archetypical users represent the goals, preferences, pain points and wishes of real users during the requirements and design phases. While these personas themselves do not ensure effective design, properly incorporating them into the product lifecycle is a highly effective way to align strategy and priorities among stakeholders.

[2] Cooper, Alan (2004),
The Inmates are Running the
Asylum, Sams, Indianapolis.

Having well developed personas helps your organization make better business decisions every day. Personas can:

Evoke empathy for users among members of your team. Personas provide a tangible, shared sense of who you’re designing for. What brings a user to your product or service? What is he/she striving to achieve? What amount of knowledge or experience does he/she bring to the task? Personas function as a proxy that your team can empathize with, which enables you to craft better user experiences

Add discipline to the design process. Specific personas help you avoid Cooper’s [2] pitfall of the “elastic user”— a nebulous user whose traits vary across stakeholders or over time. They provide a concrete foundation for your team to discuss and evaluate design decisions, making sure those designs work for an actual user.

Allow better prediction of buyer behavior. Personas provide insights into the mental models of groups of users. Your team can predict how a user would react to a new product or service because you have defined his/ her buying behavior and motivations.



GETTING STARTED

Building well defined personas takes a great deal of preparation. The first step is to gather research about current and potential customers. This information can come from a variety of sources, including surveys, usage data, interviews with customer service or support personnel, and any other demographic data that may already have been collected by your marketing department.

While all data is good, you should give special priority to information obtained from ethnographic studies. In user research, ethnography refers to studies based on direct observation of people in real-life contexts rather than controlled scenarios in a lab. As such, ethnography focuses on what users do — things that delight them, what frustrates them and the context in which they use your service or product — not what they report they do, feel, or want. Obtaining this kind of information requires a specialized skillset, as well as knowledge of who your customers or potential customers are. A good user researcher can collect information about users and present it in a form that's accessible to your team.

If time or cost prevent you from interviewing and observing real users, you can opt for the lower fidelity provisional or proto-persona based on information the team already knows or has access to. This might include information from customer service representatives or support tickets.

With your observational data in hand, begin to look for patterns. One way to do this is to group behaviors and look for characteristics that are common and unique to that group. Absolutes are rare, but tendencies are helpful. Let's say, for example, that you're designing a product for comparing and booking hotel rooms. You'd likely find that given a large list of potential rooms, all participants consider hotel ratings, costs and amenities to a degree. However, a subset of participants prioritize cost over neighborhood, and for a distinct subset, location is the primary concern. Further analysis would show that this dichotomy is correlated with vacation travelers versus business travelers.

The number of groups you find depends on the quantity and richness of your data, but you should aim for between two and five. It's paramount to ensure that the groups are meaningfully different. These groups will be mapped to personas, so it should be easy to describe how each is distinct, as well as how their differences impact the ways they'll interact with the product.

HOW TO CREATE A USER PERSONA

Once you've established your groups, you need to create descriptions for each one. These persona descriptions are empirically-based fiction. They're based on research and reflect many users, but they're expressed as individual, fictitious users. Each description should contain sufficient detail to capture the unique qualities of the group, making it distinct and memorable.



In order for your persona to conjure empathy among members of your team, its description must be crafted in such a way that the team imagines a real person.

Remember: One of the reasons to create personas is to evoke empathy. In order for your persona to conjure empathy among members of your team, its description must be crafted in such a way that the team imagines a real person. Visualize the context in which this person will use the target product or service and understand the person's goals, needs and desires.

The details included in a persona description will vary from team to team. However, in most cases, they include a name, photograph, basic demographic information, goals and pain points. They can also include behaviors, personality traits and more detailed demographic information.

Consider the stakeholders with whom you'll share your persona while determining how much detail to include. As we discuss in a later section, in some organizations the fictional element of personas is interpreted as "fluff." Including too much detail in the persona description for stakeholders in these organizations may undermine your efforts and erode buy-in to the value of persona as a design tool. If you work with such a team, use broader strokes, for example simply indicate the age of a persona as "in her mid-20s" instead of assigning it a specific age.

Next, pair your personas with scenarios — the circumstances under which a user would interact with the product. Scenarios provide designers with context that improves their conception of user flows. They aid the team in marrying a user's mental model to the conceptual model, particularly for more complex, multi-step tasks.

Share your persona descriptions and their associated scenarios with stakeholders to collect feedback and garner buy-in. Iterate as appropriate before advancing in the design process, but bear in mind that like so many elements of design, these are "living documents" that will evolve over time and therefore merit revisiting on a periodic basis. The process of developing personas is valuable to the team in terms of clarifying demographic information about your target users. The personas themselves are an easy-to-understand representation of that information. As such, distributing them to stakeholders builds awareness of the customer base, as well as the priorities you identify.

FIGURE 1. PROCESS FOR USER PERSONA DEVELOPMENT



Finally, rank your personas. This ranking can reflect proportion, i.e. which persona represents the most users; frequency, i.e. who uses the product the most often, or value, i.e. who are the most important customers. You may have just two levels: primary versus everyone else. This priority frees up the designer to design with the primary persona in mind. In designing a healthcare product, for example, a designer might struggle to find a term that is equally well understood by members, providers and pharmacists but find it easier to craft a term that members immediately understand, and providers and pharmacists can learn.

Because your personas include information about goals, expectations and scenarios, their ranking also prioritizes features and scenarios. Again, socializing them among stakeholders establishes consensus for this priority. As a design tool, personas should be leveraged in task analysis exercises to align feature priorities, and as the foundation for success criteria in user stories. Use your personas as a part of your usability review by evaluating the design relative to a scenario and associated personas. Again, the primary persona should find the task intuitive and effortless.

Personas should be a part of the entire project life cycle. A former colleague pasted photos of personas on the walls of her office to help keep the design faithful to their goals. While this raised a few eyebrows, we condone this as best practice since personas promote user-centered design.

“

A colleague pasted photos of personas on the walls of her office to help keep the design faithful to their goals.

PERSONA EXAMPLE

Our design team created several personas for an application that enabled consumers to finance the purchase of new cars. We created a persona for consumers, auto dealers and insurance dealers. Our research indicated that each of the groups differed not only by role, but also in that they used the application with different goals in mind. The examples below are excerpts from personas created for that project.

FIGURE 2. DESCRIPTION OF A USER PERSONA FOR AUTO FINANCE: CONSUMER

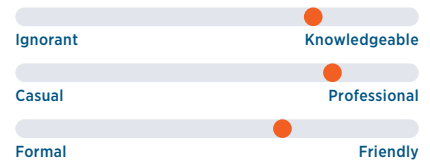
Pat Purchaser is in his late 40s and typically leases a car for three years. Pat is an occasional user of the app, using it a few months before his lease ends to explore options for trading or turning in his vehicle. He also uses the app to obtain payoff and vehicle information, as well as to extend his lease.

Auto Financing User Persona — Consumer



Gender: Male
Age: Late-fourties
Dialect: Standard American English
Accent: Neutral

Personality



IVR Attributes

- Conversational
- Natural (not robotic)
- Not overly formal
- Real Person (human)

Brand Attributes

- Trusted Partner
- Global
- Reliable
- Establishes positive relationships

Vocal Attributes

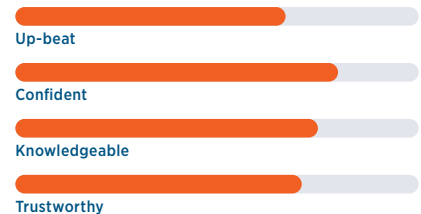


FIGURE 3. DESCRIPTION OF A USER PERSONA FOR AUTO FINANCE: DEALER

Dylan Dealer likes to research options when working with customers on their lease or purchase decisions and will use the app for payoff information. She'll use the app several times a day and will be frustrated if the experience is slow or cumbersome. About half of her customers are interested in the trade-in value of their current vehicle as part of the negotiation of a new car purchase. As her compensation is tightly associated with new sales, timely and accurate information is paramount to Dylan.

Auto Financing User Persona — Dealer



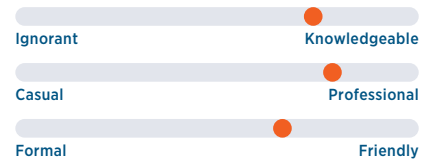
Gender: Female

Age: Mid-thirties

Dialect: Standard American English

Accent: Neutral

Personality



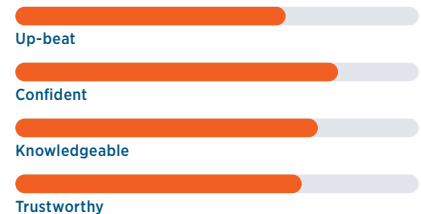
IVR Attributes

- Conversational
- Natural (not robotic)
- Not overly formal
- Real Person (human)

Brand Attributes

- Trusted Partner
- Global
- Reliable
- Establishes positive relationships

Vocal Attributes



WHAT IS AN IVR SYSTEM PERSONA, AND WHY CREATE ONE?



We believe it's best to design a system that projects qualities consistent with the brand attributes you want the user to infer rather than leaving it to chance.

In the UX field, “persona” is typically used to mean “user persona” — a representation of users of an application, product or website. However, designers of speech interfaces use “persona” to refer to the “system persona,” the personality projected by the application.

While we believe that it's always important to craft a system persona to ensure consistency, inform design decisions and align a product to brand attributes, persona is even more important in the design of speech interfaces. This is due in part to the fact that human beings instinctively conjure a mental image of a speaker when they hear speech. With just a few seconds of speech, we automatically make judgments about the speaker's gender, age and geographical origins, as well as personality traits such as friendliness, intelligence or attention to detail. In essence, users of a speech application will assign qualities to that system as soon as they begin to interact with it. We believe it's best to design a system that projects qualities consistent with the brand attributes you want the user to infer rather than leaving it to chance.

Given that the system persona exists whether we think about it or not, you should craft it to convey and solidify your brand while simultaneously subtly informing the user that the system is “helpful,” “efficient,” “compassionate,” or some other quality. Users of automated systems — especially speech systems — are engaging in a conversation. The more at ease they are, the more likely they are to succeed in the system. Successful system personas allow users to feel more at ease, as if they're in a normal, turn-taking conversation.

Creating a system persona early on in a project will help guide the feel and tone of the application in early iterations and ensure consistency over time. A best practice is to create a style guide for the system that includes details about the personality traits you wish to project, as well as concrete ways to do so. This style guide should also include how the system refers to itself, how it recovers from errors, and other design patterns. We find it helpful to include notes about what the system will not do accompanied by what it would do instead.

A good style guide can aid in writing new prompts as changes or enhancements are made to the application over time. As an application matures and is potentially expanded, the guide may serve as a framework for maintaining consistency in style for both near- and long-term projects. Similarly, the guide enables multiple designers to

deliver consistency while working independently. In our experience, spending a little extra time to enhance the style guide with additional details pays dividends in the long run. Enterprises often have brand books or style guides for the web channel and perhaps a distinct set of guidelines for marketing material. Ideally, these guides are complementary (and not in conflict). In our experience, creating an IVR style guide can be a unifying document that brings the channels together from a brand perspective. As customers increasingly interact in multiple channels, a style guide is crucial to delivering a consistent look-and-feel from the beginning to the end of a customers' journey.

SAMPLE OF AN IVR SYSTEM PERSONA:

Auto Financing System Persona



Gender: Male

Age: Mid-thirties

Dialect: Standard American English

Accent: Neutral

Personality

Ignorant ————— Knowledgeable

Casual ————— Professional

Formal ————— Friendly

IVR Attributes

- Conversational
- Natural (not robotic)
- Not overly formal
- Real Person (human)

Brand Attributes

- Trusted Partner
- Global
- Reliable
- Establishes positive relationships

Vocal Attributes

Up-beat

Confident

Knowledgeable

Trustworthy

HOW TO CREATE AN IVR SYSTEM PERSONA

First, start with marketing materials that provide the main brand attributes. Your marketing department likely has documented brand guidelines that can inform your style guide. Some companies codify their brand with taglines like “we have your back” or “we make it simple” that easily lend themselves to the development of a system persona. An online user study can also be used to elicit brand attributes from customers. How do customers see the company? Should those perceptions be built upon, or does the business want the brand to change and evolve? If so, the IVR can help achieve that.

“

Interview the agents with the highest customer satisfaction ratings. Utilize the agents' best qualities for the creation of the IVR system persona.

Next, learn about your users. Ethnographic and usage data can provide you with more information about your most frequent users' characteristics and their objectives. Ask yourself what personality they would most want to interact with in light of these caller goals. For example, the “we have your back” persona is more likely to resonate with patients seeking information about healthcare coverage while the “we make it simple” personality may be better suited to making hotel reservations. If you haven't already created your user personas or caller archetypes, do so now. That way, you have some imaginary speakers for your system persona to have a dialogue with.

Context is also an important factor when crafting a system persona. If your callers are likely to be nervous or anxious, the persona should be helpful and reassuring. If the callers are in a hurry or concerned about security, the persona would want to take a different tone and style. To determine the impact of context, ask yourself questions such as: What sort of situations will they be calling from or about? What kinds of questions and what sort of information will the application be dealing with?

Another useful activity is to interview the most successful agents — those with the highest customer satisfaction ratings. Sit with those agents and perform “side by sides,” which involves listening in on their calls and then discussing them. The information gleaned from this activity helps inform caller archetypes, as well as the IVR system persona. While listening and talking to agents, it becomes clear why they're successful and how they contribute to the brand. Utilize the agents' best qualities for the creation of the IVR system persona.

We've already discussed the importance of research in creating a user persona. What's so important to understand is that the data gathered during that activity can also be used for the creation of the system persona. This twofold usefulness of information more than justifies the time and effort involved. At PTP, we find it helpful to craft both types of persona in tandem at the conclusion of these research efforts.

Once the main brand attributes are identified, write sample dialogs that show some common paths through the application. Use the different caller archetypes to imagine what these conversations will sound like.



DEFINING THE IVR SYSTEM PERSONA VOICE

An important consideration in the design of speech applications is the voice of audio rendered by the application, either as pre-recorded files or dynamic text-to-speech. The voice quality of the system must be consistent with the desired persona. The system persona consists of several aspects of the character's personality: the vocal attributes of the voice actor, the style of the language and how the voice talent is directed — i.e. coached — while in the studio. Each prompt should be carefully crafted to match the system persona. It's important to remember that the delivery is just as important as the words spoken. Moreover, good coaching by an experienced director is critical to conveying the meaning of the prompts, as well as ensuring that the words are delivered in-persona and spoken in a conversational, friendly manner to evoke callers' trust.

“

It's important to remember that the delivery is just as important as the words spoken.

When creating an application with multiple languages, the voice of your application will probably differ by language, and the persona will likely vary by location as well. The persona needs to reflect the different perceptions and preferences of the culture of that language. When designing the system personas, it's helpful for the designer to leverage the knowledge of a cultural consultant for each location to advise on matters such as gender or personality attributes. For example, in a recent usability test, it was found that Northern Chinese users preferred more concise, straightforward and professional prompts, while users from Southern China and Taiwan preferred a softer, gentler and more polite IVR system persona.

When selecting voice talent, don't forget to consider the cultural norms of the user population. In some cultures, it's not appropriate to employ a female voice talent. This obviously affects persona choices, but it may also have design implications. For example, in some locations where culture dictated we use a male voice, we needed to suppress the personalized greeting that the same system offered in different regions because it's inappropriate for men to address women they don't know by name.

SELECTING A VOICE TALENT

If the system you're designing will interact using speech, you'll need to select the best voice to do so, even if that voice is a text-to-speech engine. The process for selecting a voice talent can take several forms.

To start, conduct an open casting call, and have a wide variety of voice talents record a few different types of prompts such as a welcome, main menu, error prompt, and legal disclaimer. Unlike recording a dialogue that studios charge for, this is a casting call, which means the talent and studios will do it for free.

There are two different methods you can use to determine the voice of the application:

- ① The less resource — and cost-intensive option is for the designer and client to determine the best fit together. The studios send the designer many examples. The designer then eliminates all but the top contenders — approximately five of each gender, if gender is undecided, which it often is. After this, the designer reviews the top contenders with the client. Note that the more options there are, the longer and more difficult it is to reach a consensus. The client makes the final decision, and the voice talent is engaged.
- ② The preferred but often times costlier and more time-intensive option is for the designer and client to work together to determine top contenders — again, around five per gender. The next step is to use an online survey with a small incentive to determine caller reaction to the various voices. You ask users to rate each voice talent for certain characteristics or attributes — such as “honest” or “helpful” — to see which voice aligns with your system persona. If there are multiple runners-up, the client will probably want to make the final decision. At the same time, they may leave it strictly up to the survey results.

CREATE A SYSTEM PERSONA DEFINITION DOCUMENT

The system persona definition document can be part of the style guide. It should include key brand attributes, the gender and approximate age of the system persona, as well as other details that help bring the persona to life. This will help not only designers, but also the voice talent.

Once a system persona and voice have been determined, embrace them. This will only help create a better user experience and therefore better results for your application.



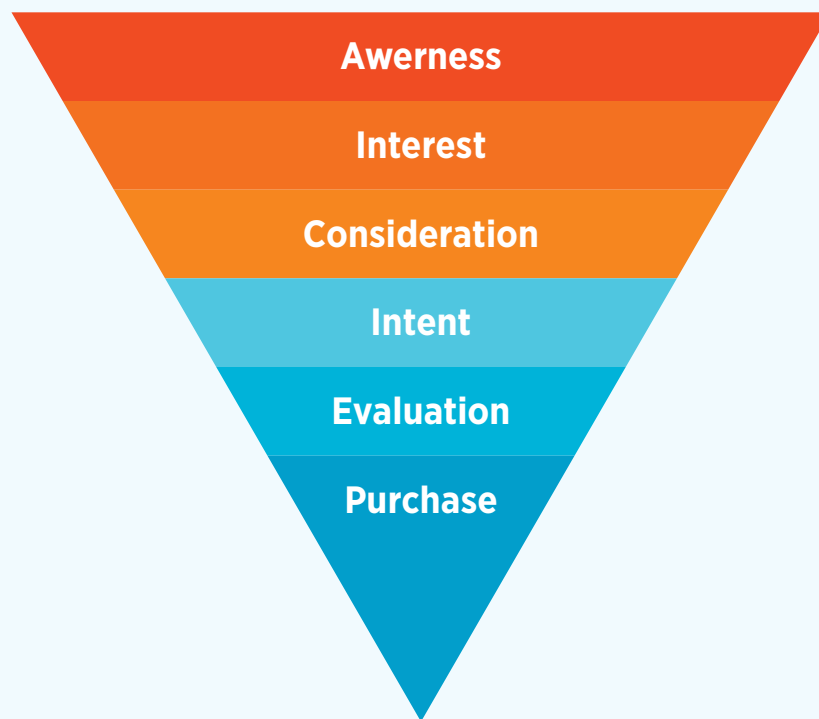
WHAT IS A MARKETING PERSONA, AND WHY CREATE ONE?

When looking at personas from a marketing perspective, you're trying to understand the target buying audience so you can create content that appeals to them and corresponds to where they are in the buying cycle.

Marketing personas are used to create representations of specific groups of potential and current customers. These personas are based on data from various sources, including sales, customer service, analyst research, and any behavioral reports such as buying patterns, interactions with emails, advertisements, and other measurable engagements. The concept behind creating marketing personas is that if you think about your audience on a more personal level, it will increase your ability to become more targeted with your communications and offers, as well as deliver the right content at the right time in the buying cycle.

For example, a person who typically uses project management software may be completely content with what he or she is using, but doesn't realize there are better options available. A good marketing campaign from a prospective software company would begin by delivering information on specific challenges people encounter in project management - challenges they may not even know they have - and how their software might address and solve them. Once the prospect is engaged, then the company can deliver information on specific features, or videos with product walkthroughs to show more of what the product can provide. Again, as the prospect continues to engage with this content, then you can begin to deliver more targeted content such as relevant case studies, pricing, and / or license options. This allows the consumer to work their way through the standard marketing funnel: Awareness > Interest > Consideration > Intent > Evaluation > Purchase.

Traditionally, the majority of marketing personas are created using standard surveys of your customer base that examine things like age, gender, preferences and occupation. This data usually lends itself to the creation of four or five different personas.



For example, a basic marketing persona for a life insurance company could be:

Bob Miller is 30 years old and recently married. He works as a manager at a manufacturing plant. He and his wife are planning to start a family, so he wants to purchase affordable term life insurance to ensure their children are always taken care of.

Once you have the basic characteristics for a marketing persona, you can dig a little deeper based on the information you can gather. Good data sources include broad surveys, website analytics, email campaigns, user testing, your CRM, and your customer support and sales teams. Social media can also be utilized as a listening tool to gauge positive and negative reviews, as well as learn about customer needs, concerns, and desires.

HOW TO BUILD MARKETING PERSONAS

When creating a marketing persona, start with your basic demographic data to answer the question: Who is this person? Where are they at in the buying cycle? What do they need? What makes them want to buy? What's important to them?



It's important to first understand what this persona is trying to achieve with your product, what challenges it faces and what would make it successful.

It's important to first understand what this persona is trying to achieve with your product, what challenges it faces and what would make it successful. For example, at PTP, we are a Business-to-Business (B2B) company that's focused on customer experience, so a target customer could be the Director of Customer Service at a company that's dealing with a lot of dropped calls — and consequently, a subpar CX — due to an outdated IVR.

Next, you need to understand where your persona is in the buying cycle. This will show you whether the prospect is a decision-maker and how far along they are in evaluating the available solutions. Is the person high up enough in the chain to make the purchase decision? If not, who is, or who can influence that decision? Using the example above, the final decision maker could be a CEO who won't be the actual user of the product — but who's focused on improving CX and wants to know where to make the right investments for the organization. This is another person who can be influenced by the first persona.

Understanding that, in B2B, the purchase decision often involves many people, from the user or group of users, to the IT person who needs to provide support, to the supervisor who approves the purchase. All of these individuals have an influence on the purchase and need to be considered when building out target personas. In a sophisticated marketing campaign, each of these influencers should be identified and delivered content specific to their role in the buying process.

It's advisable to build out specific scenarios in flow charts that show what the personas are trying to achieve, how your product helps them do that and where they're getting their information from. This will help you understand their thought processes so you can put together the right kind of content. In addition, use website and campaign analytics to determine the preferred communication methods of each persona and elicit the desired response. For example, it might be preferable to send the CEO direct mail packages while the manager might respond better to videos.

Finally, you need to periodically revisit your marketing personas. Over time, new data can come to light that may change their attributes or objectives, which will result in a need to tweak them. For example, the average age of a persona may increase, or the preferred communication method may change from email to video.





WHAT MAKES UP A GOOD PERSONA

Regardless of the type of persona, it is important that it resonate with the team. In our experience, that resonance is achieved when the team is able to strike the appropriate balance between sufficient detail to bring the personas to life, but not so much information that the details themselves are distracting.

SO, WHAT DETAILS SHOULD YOU INCLUDE?

While we believe that more details are helpful to the design team, we previously cautioned that you should consider the stakeholders with whom you'll share your persona when determining the level of detail to include.

Personas are, after all, hypothetical if not fictional which may lead to some sceptics to dismiss their utility. We view this as an opportunity to educate the cross-functional team about the role of personas in user-centered design but recommend that you assess your audience before socializing your persona documentation.

EXAMPLE OF A MARKETING PERSONA:

James Rivera

Age: 45
Work: Customer Support
Family: Married
Location: Seattle, WA
Character: Old School

Bio

James has enjoyed supporting customers for seven years. He is tech-savvy and proud of his knowledge of current offerings, but especially older versions and retired products. He wants the system to be intuitive and minimize his effort so he can focus on getting to answers.

Preferred Channels



Motivations



Goals

- Customer Retention
- Educate customers and co-workers
- Automate manual tasks

Frustrations

- Clunky or confusing UX
- Manually annotating interactions
- Two clicks where one will do



Personality



Agreeable

Accessible

Dependable



"I want to streamline the ticketing system so that manual or mundane tasks are automated and the information I need can be found quickly and efficiently"



WORK WITH AN EXPERIENCED PARTNER TO DEVELOP YOUR PERSONAS

Clearly, when properly developed, user personas, system personas and marketing personas can be powerful tools that can help you significantly enhance your CX. That's why, before investing in upgrading your IVR, it is critical to develop your personas so you have a 360-degree view of your target audiences. This will enable you to design a more efficient, accurate system and as a result, increase your overall satisfaction rate.

At PTP, we possess extensive experience helping companies develop personas as a part of improving their CX. [Contact us](#) to learn how we can help your organization.

AUTHORED BY:



Frederick Parkinson
CX Solutions
Consultant



Helen Vanscoy
Director, User
Interface Design



Chelsea Titus
Senior Interaction
Designer



Rosemarie Connolly
User Interface
Designer



Mark Pendolino
Marketing
Director



ADDRESS

Performance Technology Partners, LLC
11341 Gold Express Drive, Suite 160
Gold River, CA 95670
United States of America

PHONE

1.800.787.4143

FAX

916.266.8708

INFO & INQUIRIES

info@ptpinc.com

WEBSITE

ptpinc.com