Persona Template

Month 20YY

Version X.XX

Company Information

# Personas List

[When you have completed each persona, add them to this list for easy reference.]

# Overview and Resources

[Describe the user research and data sources used in compiling the personas. Include an explanation on categorizing personas by buyer or user segment. Examples show below]

* Year-end sales data
* Service management data by quarters
* Gartner trends report
* Online customer surveys
* Agency brand analysis report

Sales data, combined with post-purchase customer surveys allowed us to break down our marketing personas into five customer segments.

[Note: we have combined the sample personas that follow, providing a marketing example and design example. While much of the data between the two types is similar, areas on each will have differing levels of detail. The same type of personas can be used for both end consumer and business-to-business scenarios].

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| --- | --- | --- |
| Persona Type | Marketing | |
| User/Customer Name | Job Title/Functional Role | Customer/User segment |
| Paula Profile | Human Resources Manager | Administrator level user |
| Photo | Key Demographic Details | Personality& Behavioral Characteristics |
|  | **Age:** 42 years  **Gender:** Female  **Family:** Divorced, two children  **Education:** Masters in HR management  **Location:** greater Miami FL  **Income:** $85,000  **Organizational details:** SMB, 148 employees, customer service vendor  **Employment:** 15 years, 4 in current role. | Works onsite with occasional remote work  Manages two full-time salaried staff, one part-time hourly clerk.  Committed to ensuring legal and security compliance in all activities.  Hands-on manager willing to do one-on-one training and troubleshooting.  Likes to stay on top of HR trends via association memberships and attendance at conferences. Avoids signing up for or attending webinars because of schedule.  Has influence over purchasing decisions. |
| Representative Quote | Pain Points | Drivers & Influencers |
| “I wouldn’t ask my staff to do anything I’m not willing to do myself.” | Current talent management system is no longer supported by vendor, relying on existing documentation for support.  Turnover in the industry is relatively rapid, and one full-time person is fully engaged in updating system with new and filled requisitions | Annual budget review and planning period runs August to November.  Peak operational periods are winter retail holiday season, and back-to-school.  VP of Human Resources resists large technology expenditures. |
| Purchase/User Experience Goals | Motivations | Perceived Obstacles |
| Reduce time spent on manually extracting key talent management reports.  Shift focus to building data-supported recommendations. | Wants to reduce workload on her limited staff and focus on more proactive talent management activities. | Reporting functionality is extremely limited, and doesn’t reflect company needs.  Lack of executive awareness of her team’s resource limitations. |
| Relationship to Brand/Product | Technology Expertise | Preferred Channels / Devices / Platforms |
| Expert on existing TMS.  Completed demos and short-term trials of latest version.  Lack of support for existing TMS version is frustrating.  Willing to explore other vendors. | Moderate experience in current OS and browsers in use.  Expert in TMS  Expert in spreadsheets and word processing.  Limited exposure to collaboration and text messaging. | Uses laptop in office, network connected to TMS, various shared drives and company intranet.  Does not use tablet within work environment.  Uses mobile phone to track emails, schedule, and participate in conference calls while in transit.  Likes the ability to retain emails for future reference. |

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| --- | --- | --- |
| Persona Type | Design | |
| User/Customer Name | Job Title/Functional Role | Customer/User segment |
| Bertram “Bert” Biography | Engineer | Gen Y Road Warrior |
| Photo | Key Demographic Details | Personality& Behavioral Characteristics |
| C:\Users\Connie Giordano\Downloads\11588247_170418_0029_9o2z8s.png | **Age:** 31 years  **Gender:** Male  **Family:** Married, expecting first child  **Education:** BS in Computer Science, currently working on MS.  **Location:** suburban Washington DC  **Income:** $165,000  **Organizational details:** large telecom provider  **Employment:** 10 years, 2 in current role. | Works remote/on-call on a team of 5 engineers, 1 supervisor  Connects to company resources via wireless and VPN  Regularly posts 50-60 hours per week.  Planning for new baby and move to larger home.  Considered a go-to teammate for fixing difficult issues.  Regular contributor to engineering/telecom forums and online communities.  Has multiple engineering and network certifications.  Purchases new devices and apps as soon as they’re released.  Has limited input on purchase decisions. |
| Representative Quote | Pain Points | Drivers & Influencers |
| “Give me an hour and a remote session and I can fix almost anything a customer can throw at me” | Time consuming search for specs on installed devices while handling onsite calls.  Mislabeled service requests frequently eat in to time to resolution. | Service resolution metrics affect compensation / bonuses.  Interested using videos to support some engineering service activities.  Desire to stay certified on major products and technologies in the telecom space |
| Purchase/User Experience Goals | Motivations | Perceived Obstacles |
| Quick retrieval of troubleshooting and other technical support content on tablet and/or smart phone.  Ability to add case history, workarounds to the company databases on the fly. | Competition and recognition among his peers for technical expertise and ability to solve problems.  Need to save time in all aspects of his life. | Management doesn’t understand the challenges of being a field engineer. |
| Relationship to Brand/Product | Technology Expertise | Preferred Channels / Devices / Platforms |
| Considered a VIP on router configurations.  Willing to offer input on new / enhanced features. | Expert proficiency in multiple operating systems, diagnostics, monitoring tools.  Experienced with most office productivity and collaboration tools | Smartphone  Tablet |