# WRKSHP

Tool guide

# Persona

How to create personas for design, marketing, validation, and storytelling.

# 1

# Introduction

When coming up with ideas for a new product, service, story, or other artefact, that ultimately will be judged by people in the form of users, customers, or audience, it makes good sense to design in a 'human centric' way. Always keep the needs, thoughts, and character of the people you are designing for in mind.

**Human centric is hard**
In practice, it can be hard for any designer to get a clear picture of what those needs, thoughts, and goals are exactly. There can be a lot of noisy, conflicting 'soft' data to work with, as well as numerical research information, it can be hard for any designer to get a clear picture of what those needs, thoughts, etcetera are exactly.

And, if it is hard for any single designer, it is even harder for a team. It is just hard to combine 'hard' numerical data on for instance the demographics of a customer segment with more emotional, 'soft' information.

**Personas to the Rescue**
That is where personas come in. They transform an amorphous collection of stories, anecdotes, and facts into fictional characters that we can relate to.

Putting a name and a face to personas helps to bring the relevant information into focus. In this way, personas answer the question 'Who do we design for?' One or several of these fictional characters – in the form of personas – represent the majority of the potential users.

**Definitions**
Adam Cooper, who came up with the idea for personas, uses the following definition in his book 'The Inmates Are Running The Asylum': 'Personas are not real people, but they represent them throughout the design process. They are hypothetical archetypes of actual users. […] Personas are defined by their goals.' ∎

# Personas are [not real people](), but they represent them throughout the design process. They are [hypothetical archetypes]() of actual users.

> Adam Cooper

The Inmates are Running the Asylum, Adam Cooper

>

# 2

## Why use personas ?

When designing, it is very easy to fall into the trap of thinking for your customer. Instead of diving into what makes your users and customers tick, it is tempting to assume they will think and behave as you do. This can be very hard to spot: we are all living in our own tiny bubbles, and the amount of diversity we come into contact with on a daily basis is very limited. When designing something for other people, this can be very dangerous.

**Reason #1**

**Personas allow you to keep full focus on your users or customers in the design process.**

**Design is about people**
Whatever you are designing, if it is a new product or service, a new business, or something completely different, it is very important to remember you are designing something for other people.

What you are designing should help those people solve a problem, fulfill a need, be delighted. To be able to design well, you need to understand the people you are designing for. And to be make it easier to understand them, it helps to use the right tools. The persona is such a tool.

**Up close and personal**
Using personas gives groups of people that may have behaviours or opinions that are quite different from yourself a face and a voice, and

makes it much more easy to keep them in focus during your design process.

Just being able to ask 'what would (persona) Jane think about this feature' can help keep you on track. In this way, you avoid self-referential thinking, and help designers place themselves in the user's shoes.

**Easier communication**
As a bonus, using personas makes it much easier to talk to others about what your users want. They can be used to build a common understanding within your team, and also across teams.

# We're [blind to our blindness](). We have very little idea of how little we know. We're not designed to know [how little we know]().

> Daniel Kahneman

Thinking Fast and Slow,
Daniel Kahneman >

### Tunnel vision

When designing, it is very easy to fall into the trap of thinking for your customer. Instead of diving into what makes your users and customers tick, it is tempting to assume they will think and behave as you do.

This can be very hard to spot: we are all living in our own tiny bubbles, and the amount of diversity we come into contact with on a daily basis is very limited.

When designing something for other people, this tunnel vision can be very dangerous, because most people are very different from us. Therefore, as a designer you should actively strive to find and represent this diversity in your process. You're not designing for yourself, but for your users and customers.

### (Hidden) assumptions and biases

The tunnel vision mentioned above is a problem for everyone, from experienced designers to novices. The reason is that it is very difficult to imagine the breadth of different perspectives and opinions other people may have. It is too easy to base your ideas on your own limited perspective and experience. It's impossible to get rid of your biases towards the world.

The difference between experts and novices is that experts are aware of some of their biases, and they have adopted processes that will uncover hidden biases they are not aware of.

### Debugging your perspective

In a way, experts have found ways to 'debug' their perspective. Using personas and validating them in the real world is an effective way to do that.
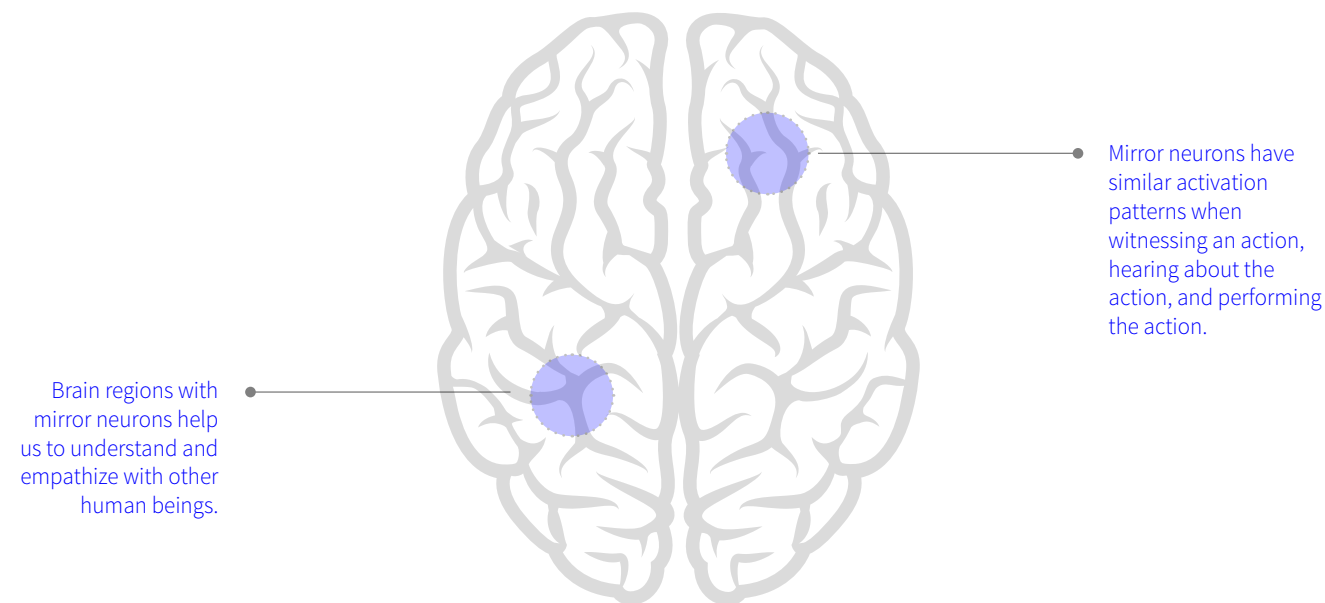
The persona helps you to make your current perspective explicit – including any hidden assumptions and biases. Validating your persona with actual people will then confront you with the fact that people think quite differently from what you imagined.

When actually 'debugging' your perspective, either when interviewing other people or validating hypotheses, look for two things.

**1** Check if the persona you came up with makes any sense. Can you find people that feel as if the persona maps their perspective? Do people resonate with it?

**2** Look for what you don't know you don't know: those behaviours, opinions, and characteristics that are present in the data but fall completely outside of what you mapped. These are your blind spots.

Finding blind spots can be extra effective when you are also looking for blind spots that are shared by everyone in the market. These are the new opportunities nobody has identified yet.

**Reason #2**

# Personas help you to make hidden assumptions and biases about your customers and users explicit.

Mirror neurons have similar activation patterns when witnessing an action, hearing about the action, and performing the action.

Brain regions with mirror neurons help us to understand and empathize with other human beings.

# Personas make it easier for your brain to process data about customers.

**Data as the antidote?**

The obvious antidote to this tunnel vision is to use actual data. Unfortunately, doing that effectively is harder than it sounds. The brain has a hard time integrating raw, 'hard' numerical data with 'soft' data such as anecdotes and stories.

Even if you managed to integrate this information in your mind, it is very hard to make decisions on it – and even harder to communicate your conclusions. Numbers, facts, and stories that are separated from the people behind them feel artificial and intangible.

**Transform your data**

So, rather than trying to integrate this data in its raw form, it makes sense to transform it into something the human brain can handle.

We are wired to make sense of other people, keeping track of their needs, thoughts, and behaviours over time.

**Mirror neurons**

Your brain contains millions of mirror neurons. These special neurons have similar activation patterns when witnessing an action, hearing about it, and performing it. This allows us to empathize with what others are experiencing, by, in a sense, reliving it ourselves. Mirror neurons are responsible for the fact that we can learn from observing others.

Personas tap into this layer of the brain. This is why stories and anecdotes are indispensible. Done right, they enable everyone in your team to have a clear sense of what your audience might do or think, with just a little extra effort. ∎

# More than just basic statistics

Real audience
member

Average audience
member does not reflect
clusters on the audience
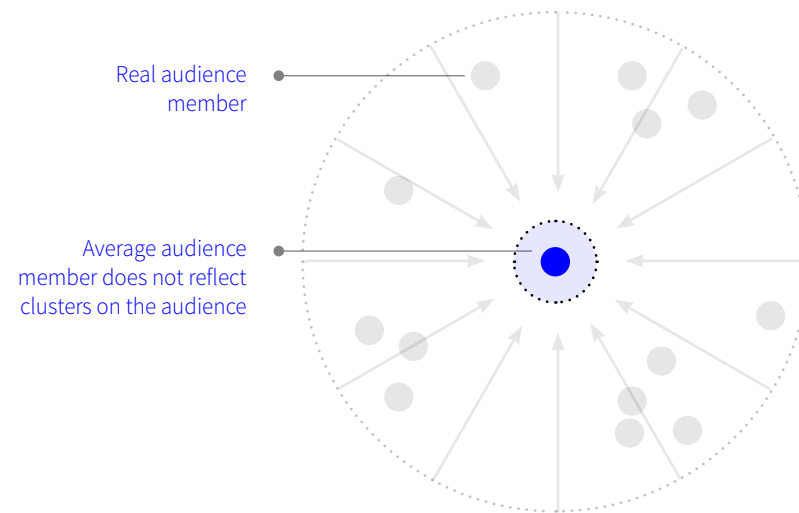
Fig 1. The average audience member in an audience means you focus on only
a small part of the audience's possible range of preferences.

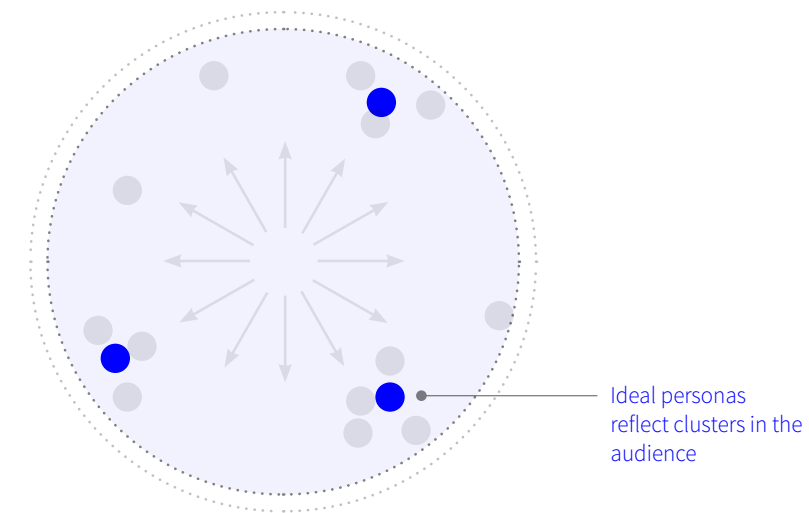Ideal personas
reflect clusters in the
audience

Fig 2. Multiple personas used to represent an audience means you keep the
playing field wide: you learn about a wider range of audience preferences.

**A persona is not a demographic profile, a market segment or a summation of survey data.**

A benefit of personifying the data is that you can circumvent a drawback that can happen with statistics. With simple statistics, it is easy to overgeneralize and equalize, getting rid of outliers and richness that exists in the data.

Especially in the early stages of design, you need to keep the playing field wide. You need to retain evidence of outliers and diversity. If you don't, you run the risk of basing decisions on overgeneralizations based on your bad assumptions.

Personas allow you to group data from different sources together in manageable chunks, while still retaining all of the various quirks, special cases, and outliers that may give you new ideas and insights later on.

To illustrate what could happen if you rely on off-the-cuff statistics early on, think about the following example:

According to demographic data, the average household in the Netherlands has 2.1 children.

Obviously, there is no actual household that has 2.1 children. Rather, they have 0, 1, 2, or more. Nobody needs to buy 0.1 children's bed or 0.1 stroller. The needs of a family with no children are vastly different from those of a family with twins. The average alone can't reflect this.

This example may seem trivial, but it illustrates how relying on basic statistics in an overly simplistic way can get you into trouble. ■

**3**

# Mental models, assumptions, & bias

Whenever you are working with personas, it is important to keep in mind they are nothing but mental models. The personas reflect what *you* think about the world, not the absolute 'truth'. You'll need to become aware of how your personal perspective colours how you perceive the world, and find your hidden assumptions and biases.

**Your assumptions are your windows on the world. Scrub them off every once in a while, or the light won't come in.**

> Isaac Asimov

**Your hidden assumptions**
Only by acknowledging your personal perspective colours how you see the world will it become possible to discover the hidden assumptions and biases you have.

Some of these could be deeply linked to beliefs you have about how the world works – and if they hold you back from success, be prepared to challenge them. Your personal 'mental model' will adjust and grow over the course of your design journey, and get closer to the truth.

**The persona as a Mental Model**
Even if you never heard the term 'mental model' before, you have been using mental models every day. A mental model is, at its core, nothing more than an explanation of how something works. It

is an overarching term for any sort of concept, framework, or worldview that you carry around in your mind.

A persona is your mental model of how a member of a group of people might think, feel, or behave. Mental models also guide your own perception and behaviour. They are the thinking tools that you use to understand life, make decisions, and solve problems. Learning a new mental model gives you a new way to see the world.

That means, that if you construct a mental model consciously, and reflect on it, it will give you a deeper level of understanding.

### It's never perfect

Mental models are never perfect, but can be useful. No single mental model from physics or engineering provides a flawless explanation of the entire universe.

Nevertheless, the best mental models from those disciplines have allowed us to build bridges, roads, and cities, invent new technologies, and even visit the moon.

The best mental models are the ones that have the most utility. They are broadly useful in daily life. Understanding them will help you make better decisions. This is why developing a broad base of mental models is critical for anyone interested in thinking clearly, rationally, and effectively.

One of the reasons mental models such as Personas work so well is that they package a powerful representation of aspects of the world in a format that works well with the human mind. By personifying data you open it up to all the machinery in your brain that was developed for social interaction. This gives them a lot of utility.

### The map is not the territory

The drawback of unleashing this social power is that personas can start to lead a life of their own. They start to seem just a little too 'real', or are abused easily by people to voice their own opinions as if they were the persona's.

Remember that 'the map is not the territory': your persona is a mental model, not reality. Keep going back to validate your model with real data.

### Assumptions and Bias

Especially when you first construct your personas, they will be filled with your own assumptions and biases. There is no way around that. But it doesn't have to be a problem as long as you are aware of it.

Confront your persona with data from the real world: real stories, real numbers, real anecdotes and opinions. For example, if you assume most of your potential users have a certain opinion, but you can't find any evidence of that in your interviews, then you have learned something about your own assumptions and biases.

Knowing the truth helps you to make better decisions. ∎

# All models are wrong, some are useful.

> George Box

# Scientists generally agree that no theory is 100 percent correct. Thus, the real test of knowledge is <u>not truth</u>, but <u>utility</u>.

> Yuval Harari

# Four types of persona

Personas can be used for many different things, and as such, many different types or flavours of personas have evolved. Below, I list four of the most well-known types of personas with their use cases.

## 1

### Design Personas

Design Personas are used to support product design and service design. They represent users of that product or service, and are grouped together by e.g. the problems they experience, the needs they have, their preferences, and their goals. They describe the needs of potential users and help developers focus on finding out what solutions benefit users the most.

Used mainly in **Service design**, **UX design**, **interface design**

## 2

### Marketing Personas

Marketing Personas are used to figure out what types of marketing strategies, channels, and styles should be used to reach potential customers. Different groups of customers might share certain buying preferences, social relations, modes of consumption, and buying power.

Used mainly in: **Marketing**, **Branding**, **Sales**.

## 3

### Validation Personas

Validation personas are used to support the early stages of the design process for a new product or service. They help map out assumptions you may have about what the product should be, and confront these assumptions with reality. Where traditional design personas are used to figure out design problems in user experience or interface design, personas used for validation are more high level and deal with how people experience a problem.

Used mainly in: **Early stage product or service design**, **Startups**

## 4

### Storytelling Personas

Storytelling personas are used to map out how an audience will respond to a story, presentation, or pitch. What do they know, think, and feel before they have experienced the story? What would you like them to know, think, and feel afterward? Using storytelling personas can help you to figure out how to reach different groups in your target audience that have different preferences and needs.

Used mainly in: **Presentation design**, **TED Talks**, **Pitches**

Personas for design                    >

Personas for marketing and sales       >

Personas for validation                >

Personas for storytelling              >

# Personas: pros and cons

Five reasons why you should definitely use personas in your next design journey.

It's easy to **imagine the person** behind the persona

Personas help surface **hidden biases** and **assumptions**

Personas help you **focus** on your customers or users

Personas help **make decisions** by adding **real-world context**

Personas offer a quick, inexpensive way to **prioritize**

Personas can be **confused for reality** instead of models

Without **proper validation**, personas can **enforce bias**

It can be difficult to get **all the richness you need** into 2-3 personas

It can be tempting to create **over-detailed personas**

Personas can give a **false sense of validation**

Five reasons why you should be careful when you are using personas in your design journey.

# PRO CON

# **4**

# How to **create personas**

Part 2 is all about creating personas. It contains a step by step guide that will take you through the process, complete with examples. The examples in this section are based on a specific use case, but are easily adapted for your own specific situation.

**It's an iterative process**
Creating a persona is an iterative process. You won't get a good result by just doing a single pass. You'll definitely need to validate your results with real people and adjust what you came up with. In fact, by taking this iterative approach you'll be able to learn much more – not only about your target audience, but also about the blind spots and hidden biases you may have about your audience. There is no better way to learn than to be confronted with your own mistakes and correcting them.

When you dive into the step-by-step guide below, keep in mind that you'll probably iterate a number of times to get a result that is truly useful. Be prepared to keep finetuning your persona over its lifetime.

**The persona canvas**
When creating personas, it helps to use some kind of format to help integrate the information in a concise overview. I include the Persona Canvas to do just that. But if you don't want to use this particular visual canvas, the end of the step-by-step guide has a number of alternatives.

Working with a visual canvas helps you to get all of the relevant information on one sheet of paper that you can easily work on with your team, and hang on the wall for future reference. The persona canvas can be used to give a customer segment a face and name and make it easier to step into the shoes of the customer.

Personas make talking about customers and their characteristics more tangible and concrete, and make it easier to refer back to a pattern of characteristics. They make it possible to create and share mental models and have a common language about several customer types.

**Overview of the persona canvas**
Before we start the step by step process of building a persona, it makes sense to get an idea of what you will be working towards. The persona you'll create will be captured in a Persona Canvas, so let's have a look at what that canvas looks like.

On the next page, you'll find a detailed overview of the Persona Canvas.

# Overview of the Persona Canvas

The Persona Canvas is organized in nine different sections. It is designed to be worked on as a team with post-its and markers, and to give you an easy to read visual of your persona once you're done.

The most important element in any persona is the representation of the person itself.

The heart in the center defines the need your persona has. What is his or her goal? What is he or she trying to achieve?

Completing the representation of the person, there is space on the bottom to add identifying information such as a name and a role, and any other facts you gather.

The next thing that stands out, is that the persona is divided into a left and a right side. The left side has space for negative aspects the persona has to deal with in their life, such as fears and trends with negative impacts. The right side has positive aspects.

Using this left/right split, it becomes much easier to get a picture of what is going on in the life of your persona. ■
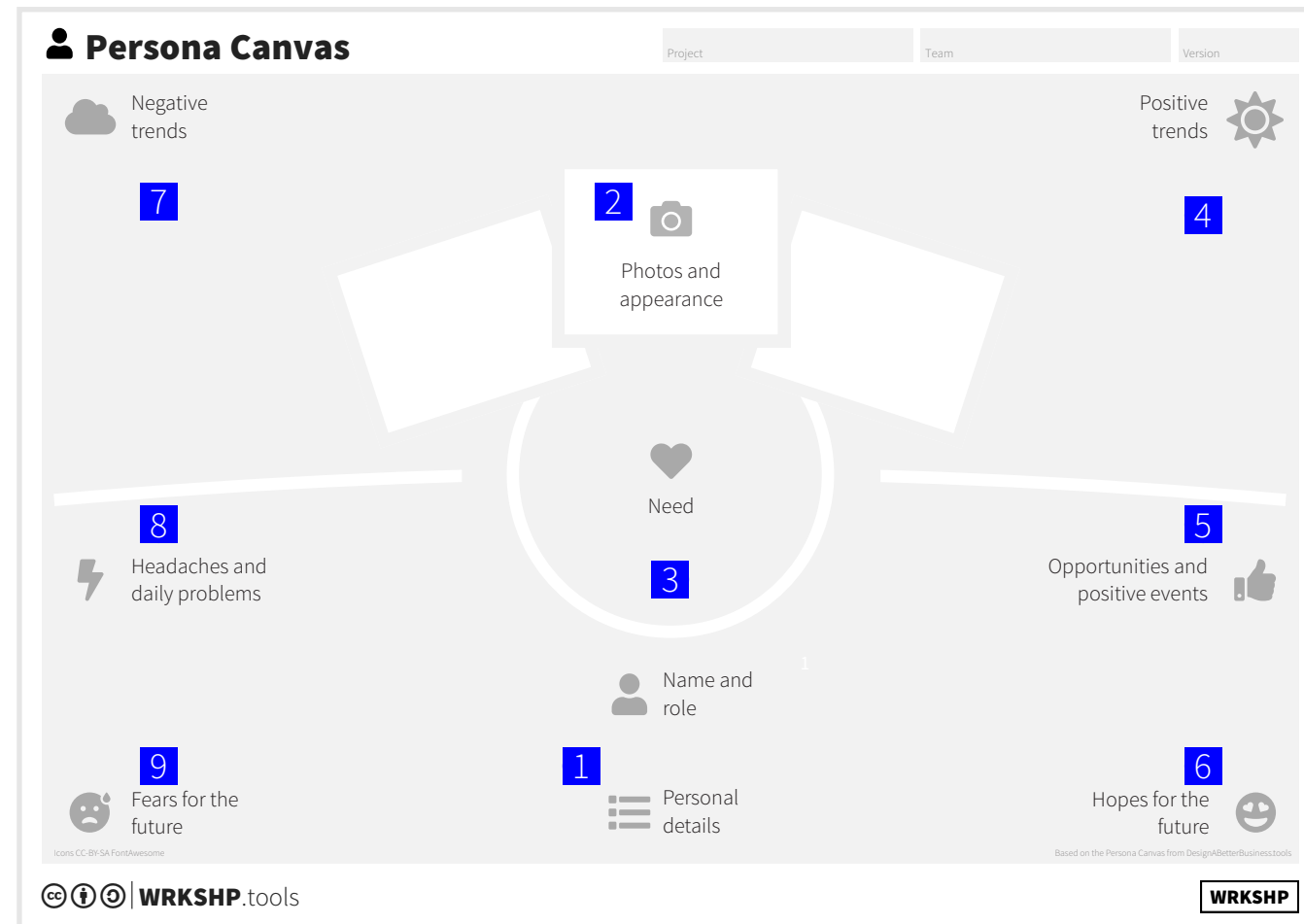


**Printable Canvases**
Printable A4 and A1 size PDFs for the Persona Canvas are included in the content pack.

**1 Name, role, and personal details**

Giving your persona a real name and role helps anchor them in reality. Using a real person as a basis is even better.

**2 Photos**

The canvas is designed to make it easy for you to add photographs of your persona. Is it a man? A woman? Is he or she happy? Or sad?

**3 Need**

This is the goal the persona has, their job to be done. What do they really want? What decisions will they make?

**4 Positive Trends**

What are positive trends the persona experiences in their life?

**5 Opportunities and positive events**

What are positive opportunities the persona experiences in their professional or private life?

**6 Hopes for the future**

What hopes does the persona have for the future?

**7 Negative Trends**

What are negative trends the persona experiences in their life?

**8 Headaches and daily problems**

What are headaches and roadblocks that the persona experiences in their life? What is blocking them from achieving their goal?

**9 Fears for the future**

What fears does the persona have for the future?

# 5

# Persona Canvas Step By Step

Creating a Persona with the Persona Canvas is not very difficult or time consuming. Following the steps below you should be able to create 3-5 good personas within a few hours.

**TIP #1**

## Balance time needed for research with quickly mapping out your initial assumptions.

**1 Define your goal**
Why are you creating a persona? What do you want to achieve? As we have seen in part 1, there are (at least) four different types of personas. Are you trying to create a persona for design? For marketing and sales? For customer validation? Or for storytelling? Although the steps to follow are the same, knowing what to focus on will help you to ask the right questions and get a better result.

For detailed examples of personas for each of the mentioned four types, please see part 3.

**2 Gather data**
This step is critical. As we have seen, it is vital to base your personas on real data. On the other hand, gathering data can be very time consuming, especially if you don't know very well what you're looking for – which will most likely be the case if you're just starting a new design journey.

To be efficient, there is a balance to maintain. You will have to spend some time and energy researching, but at the same time, you can already start by coming up with what you think is relevant for the persona and make your assumptions explicit. Both your research and your assumptions will need to be validated, so on your first stab at the persona, it is fine to mix these up.

The important thing to remember is, don't try to create a perfect persona on your first attempt. Not only does such a perfect persona not exist, but spending too much time researching or coming up with stories isn't going to get you there, even if it would. The real value is in validation.

What research should you do on your first iteration? There are a number of types of research that are super valuable on your first pass.

*Basic demographic data*
For your target audience, look at demographic data. How old are audience members on average? What are the lowest and the highest ages? What is the distribution? Where are they located? What kinds of jobs do they have? What is their gender, cultural background, level of education? Family situation? In each case, it is good to have a statistic, but it is much better to also have some examples.

> **Find at least 5-10 examples of demographic information.**

*Interviews and Social Listening*
If you have customer feedback for your product or service already, look for information that outlines what they are trying to achieve. What are their goals? What is blocking them from realizing those goals? If you haven't had the chance to talk to any users or customers, that's ok.

**TIP #2**

## Use online forums and the social media channels of competitors to get a head start.

> **Take an afternoon to go over customer feedback records, and if you can, take the time to reach out to some of your customers to get extra insight.**

If you decide to interview people, that does not mean you need to have time consuming 1-on-1 interviews.  You can also use a technique called Discussion Group, which is used in social science research. Divide all interviewees into small groups of 6 to 12 members, and let them talk freely

about the topics you offer. Write down the words and concrete ideas of the interviewees without interrupting their speeches. If there is a silence or awkwardness, you can offer new questions or prompt the interviewees to continue.

Either spend some time talking to people now (and that is time that is never wasted, you'll learn something every time you talk to a customer or user), or… look for the information online.

*Online research*
Look on forums and social networks such as Quora, Reddit, Facebook and Twitter. Try to find out what kinds of questions your target audience members ask. What do they share? What are they struggling with? What are the different viewpoints? What are the things that are discussed the most?

Especially on your first attempt, taking two or three hours going through forum posts can really pay off.

**WARNING** Keep in mind that the people that are posting in these forums and social media are not per se representative of your entire target audience.

> **Spend an afternoon going over forum posts and social media, and copy at least 10-20 quotes and questions.**

*Sentiment analysis*
While you are talking to people or researching online, make notes of the sentiments people express. Are they passionate? Demotivated? Angry? How do they feel? What kind of language do they use to express those feelings? What makes them feel that way?

Doing this can help you to get a better idea of their motivations. Perhaps here you can already find evidence of different groups in your target audience that have different opinions, problems, or perspectives.

> **Find at least 10-20 examples of different sentiments expressed by members of the audience**

*Analytics data on behaviour*
Besides sentiments, it also makes a lot of sense to look at behaviours. You can do this by looking at, for instance, the number of reactions on a post.

When a lot of people agree or disagree, that is important data. When the same question pops up many times, that is important to know.

You can also use analytics data for this. Knowing what pages on a website are visited the most, or what search terms are most used on google can give you some extra ideas for your personas.

> **Find at least 10-20 examples of posts or questions with a very high response, relative to other posts.**

What are the top posts or questions? What are the most visited pages? And are there any pages or posts that rank (in your opinion) surprisingly high or low? Write these down as well, as they may be the first hints of hidden assumptions.

*Extra research in subsequent iterations*
When you come back to this step in later iterations, you can delve deeper into each of the three aspects mentioned above, and because you have more information after validating, you can 'zoom in' more. Spend more time on research: you'll have a much better idea of what you're looking for.

> **In your second pass, try to come up with some interview questions that you can use to really get a fix on what makes your customer tick.**

**TIP #3**

# Find the forums and channels where members of your audience debate their opinions online.

ANALYTICS

DEMOGRAPHICS

STORIES AND QUOTES

CLUSTER A

CLUSTER B

CLUSTER C

**Step 3.** Before clustering, organize the different types of information you gathered in step 2 on the wall. Doing this by color helps you later on. Start to cluster by creating 3-5 core clusters, moving pieces of research data to the clusters.
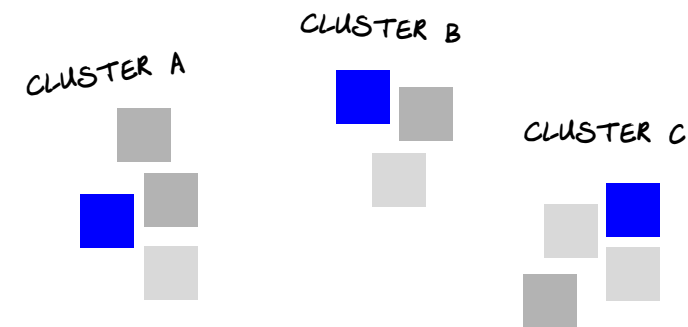
Try to keep them interesting and consistent. Make sure each cluster has different types of data. Avoid having clusters that are too similar or rely only on a single type of data.

### 3 Cluster the data
In this step, you'll filter your incoming research data and cluster it. An effective way to do this is in a workshop format. With your team, take 30-45 minutes to go over each of the pieces of information uncovered. The illustration at the top of this page gives you an idea of the process. Try to see which pieces fit well together, and come up with 3-5 clusters. These are the nuclei for your  personas. Each of the clusters should have a selection of demographics, sentiments, quotes, etc.

> **Look for themes and characteristics that are specific, relevant, and universal to the cluster.**

When you have done a first clustering, take a step back. Are your clusters distinct enough? Or are they all focusing on the same pieces of data? Do they make sense? Are the most interesting bits of research you have uncovered incorporated in

the clusters? If you answer 'no' to any of these questions, adjust your clusters.

### 4 Define your Personas
The next step is to take your clusters and turn them into personas. To do that, stick a printout of the persona canvas above each of the clusters. Looking at the clustered data, fill out the canvas.

*Name and Role*
Start by choosing a name and role to go with your cluster, and defining other relevant demographic facts.

*Goals*
Then, come up with a goal. What is your persona trying to achieve? What is the Job they are trying to get done? What is the problem they are trying to solve? What is the attitude they have towards this goal? Is it a pain? Or a nice to have?

TIP #4

**Use different color post-its for different types of information and be consistent with them.**
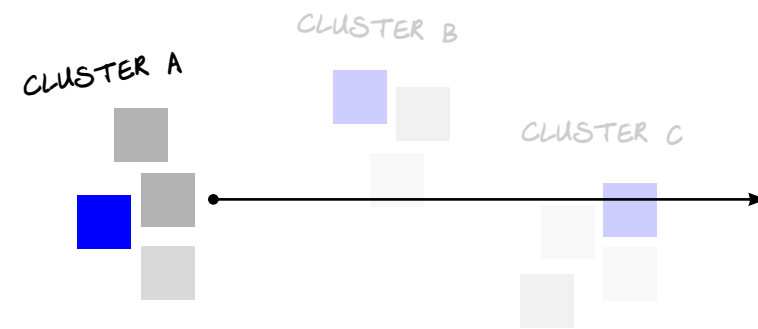
**Step 4.** Each cluster defines a persona. Take the post-its in the cluster and move them to the appropriate spot on the canvas.
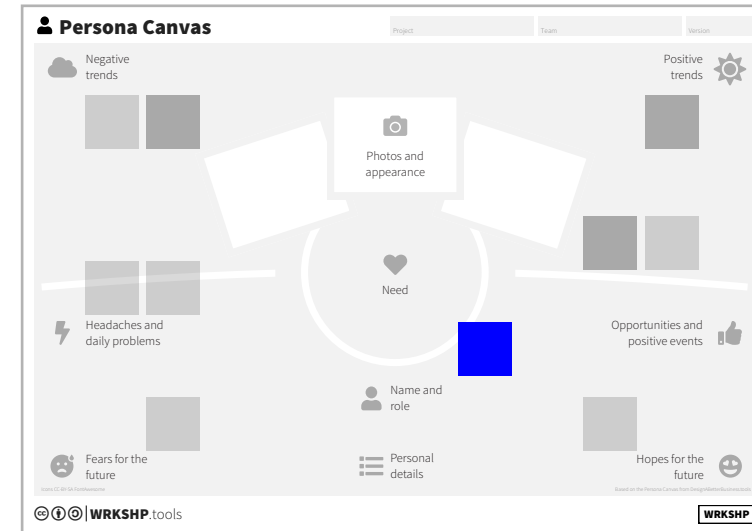
Then add new post-its to fill the blanks. Try to come up with missing information either through research or by making it up – just make sure to validate it afterward!

TIP #5

# Try to find similarities and contrasts between your personas. What do they (dis) agree on?

*Trends*
Next, go over the data you have uncovered and try to come up with positive and negative trends that impact the daily life of your persona. What are things that are happening in their world that are impacting them? It could be anything from the rise of AI or climate change to the rising popularity of K-pop. What is relevant totally depends on your project.

*Headaches, opportunities, hopes and fears*
The next step is to fill out headaches and opportunities, and hopes and fears. Headaches are things that are blocking your persona from reaching their goal. What are they struggling with, in their daily life. Opportunities help your persona achieve their goal. Fears are things they hope will not happen in the future, and hopes are things they
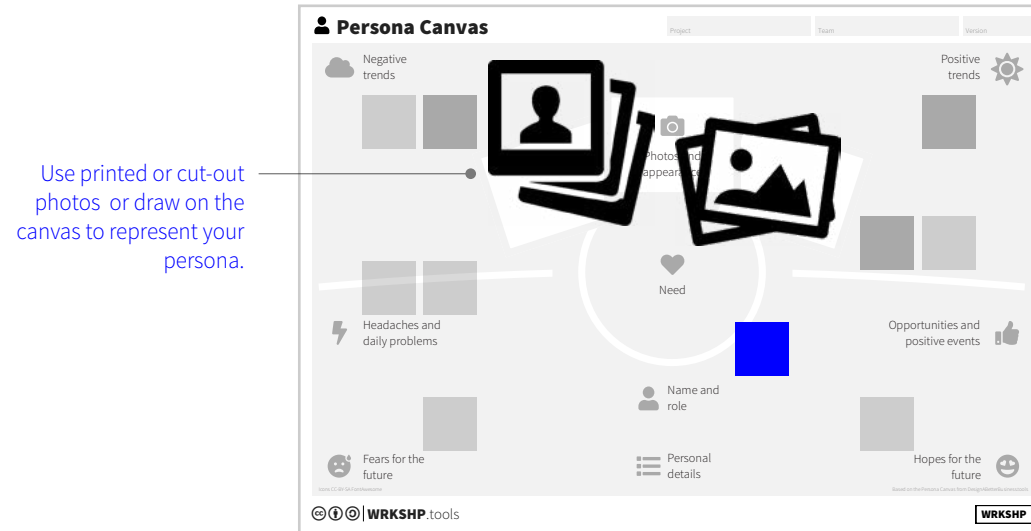
would like to happen in the future. People can be highly motivated by fears and hopes.

*Quotes*
Finally, come up with quotes for each persona. What would be a typical thing for them to say? Use the sentiment analysis and online research as a base.

> **Come up with 3-5 very different personas based on your clustered post-its. Try to be complete but don't spend hours on it.**

Use printed or cut-out photos or draw on the canvas to represent your persona.



Marked assumption for validation

**Step 5.** Create a rich picture of your persona by adding drawings, more background and story, and images or photos. Make sure you can really imagine what the persona's life looks like.

**Step 6.** Mark any post-its that are based on assumptions so that you can validate them.

**5 Create a Rich Picture**

The next step is to create a 'rich picture' of your persona. The persona canvas is designed to do this. You should get a complete picture of who the persona is, just from looking at the canvas.

> **Create a complete picture: not only the facts and data points, but also the character of the person. What do they look like? What is their world like?**

You can go overboard with this, but in the first iteration, it makes sense to go easy: after all, your work may come undone after validating it. You can either draw the person on the canvas, or stick photos, quotes, etc on it. Create a collage of the person, his or her environment, and what they hold important.

Once you're done, spend some time to go over a day in the life of the persona. With your team, map out a few of the key moments during their day. See if you can add these moments to your canvas. If you don't, the persona will remain a couple of data points, and nobody will get a 'personal' connection.
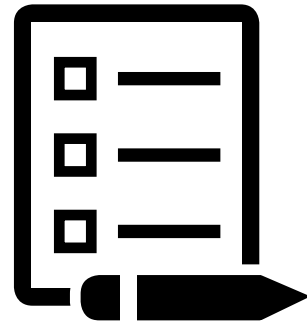
**6 Mark your assumptions**

Go over the persona you have created, and mark the things you have added to it that you have not validated or directly copied from data. These are your assumptions.

Then, add one extra assumption: that the 3-5 personas you have defined accurately cover your entire target audience. When validating, you'll probably discover missing personas.

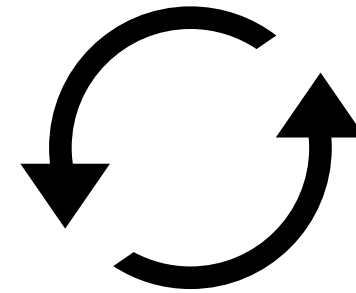**Find photos online or in magazines that represent your persona and their world.**

**Step 7.** To help you validate your assumptions, try to find evidence for them by doing online research or offline interviews.

**Step 8.** Close the learning loop by iterating. The second or third pass will make it easier to zoom in on what is important to your personas. Keep updating them throughout your design journey.

### 7 Validate your assumptions!

This is another crucial step. Luckily, it doesn't have to take a lot of time and energy. Likely, you'll be talking to (potential) customers anyway, so if you do that, mix in some questions about your persona.

Test if the goals, attitudes and preferences you have mapped out really exist. They won't perfectly match, in most cases, and that is fine; but if you only get answers that are totally at odds with your persona, it's back to the drawing board.

Another way to validate is to try and find a number of people from your target audience, and interview them face to face. Using your persona as a guide, come up with interview questions, and once you're done, see if what you find matches your persona, or if it is totally at odds.

### 8 Iterate!

Now that you have validated your persona, it's time to find the problems and fix them. To do that, go back to step 1, and proceed from there. Of course, you probably won't need to start from scratch this time, so there will be a lot less work to do. Rinse and repeat! ∎

> **A persona is never completely 'done'. Keep revisiting it throughout your design journey, and keep referring back to it.**

**TIP #7**

# Keep revisiting your personas throughout the design journey.

# Persona checklist

# A good persona...

**☐ is based in reality**

A good persona is always based in real world data, and it reflects the conclusions of research.

**☐ describes the current state**

A good persona shows the current state of the person rather than expectations about the future

**☐ favours realism**

A good persona is more realistic than idealistic. It can have interesting stories and anecdotes, but they have to be real.

**☐ challenges assumptions**

A good persona proposes a challenge to the team's assumptions and world view, and helps surface hidden biases and beliefs.

**☐ is relevant**

A good persona represents a major / important group in your target audience.

**☐ is well-defined**

A good persona expresses the major needs and expectations of the group represented by the persona.

**☐ is Interesting and memorable**

A good persona is interesting and detailed enough to help keep the design playing field large and is memorable enough to stay in focus.

**☐ is concise**

A good persona combines a lot of information in a concise way so that it is easy to communicate and consume.

# **6** Alternative Tools

You can find a lot of different templates for personas online (this is the 'player persona'). There is no single 'best' template for all situations, so if you have specific needs, it might be best to come up with your own version. Look at the Persona Canvas and online templates and 'borrow' the building blocks you need.

You can also use other tools such as the Empathy Map by Dave Gray to come up with information that helps you focus on your users or customers. The empathy map can be faster to create than a full persona, but it also has less information and it is not as easy to identify with it.

**Alternatives to the Persona Canvas**

The Persona Canvas is of course just one way of displaying all this information. There are other ways of doing it. If you need to be even more visual, you may want to use a moodboard approach, with some data added. You can also look at some other types of persona canvases, or use the Customer Empathy Map to get an idea of your customer quickly.

**Adapting the Persona Canvas**

In some cases, it can be helpful to add extra building blocks to your persona to help your project. One way in which I have used this in the past, for instance, is to add an indicator that shows if a per-

sona is more inclined to think logically/mathematically, or more inclined to be empathic and creative.

We needed to design a presentation for a mix of developers and designers, and needed to reach both groups. We made personas for each group, and tried to see how their specific way of thinking coloured their worldview.

Depending on your situation, add extra building blocks as you need. It could also be the case that while doing research and validation, you find out that there is an aspect that deserves to be mapped to the canvas separately. ■

# 7

# Using Personas

This section dives into the four different use cases for your personas that were discussed in part 1. Personas in themselves will already give you a lot of extra insight into your target audience, but they really come into their own when they are tailored to a specific use case.

**If all you have is a hammer, everything starts to look like a nail.**

> Abraham Maslow

**Four use cases**

The four use cases you will find in this part of the tool guide, personas for design, personas for marketing and sales, personas for validation, and personas for storytelling, have been selected because they are use cases that are applicable for most startups, design journeys, and new products.

If you are developing a new service or product, or starting a new startup, you will benefit from each of these use cases and will run into them in various stages of your journey.

**Other tools**

In the use cases in this part of the tool guide, I have linked the personas with other tools that complement it for that specific use case. It is important to have other tools in your tool belt besides the Persona Canvas that work well together. Only using the Persona Canvas in isolation means you are missing out.

**Combining use cases**

Combining the personas for the different use cases has no bad effect. It will even help you to be able to reuse (parts of) personas in different situations.

Remember that for different situations and use cases your target audience may be organized in different ways. A distinction that exists between two groups from the perspective of a design problem may be irrelevant from a marketing perspective. When you re-use personas, make sure to check if the personas you selected make sense for the task at hand.

If not, go back to the research you have done to create your personas (the material gathered in step 2 of the step-by-step guide) and use it to construct a new persona that is better suited to the goal you want to achieve.

It could be that you need a totally new persona, or that you simply need to flesh out a part of a persona you already created. ∎

Personas for design 〉

Personas for marketing and sales 〉
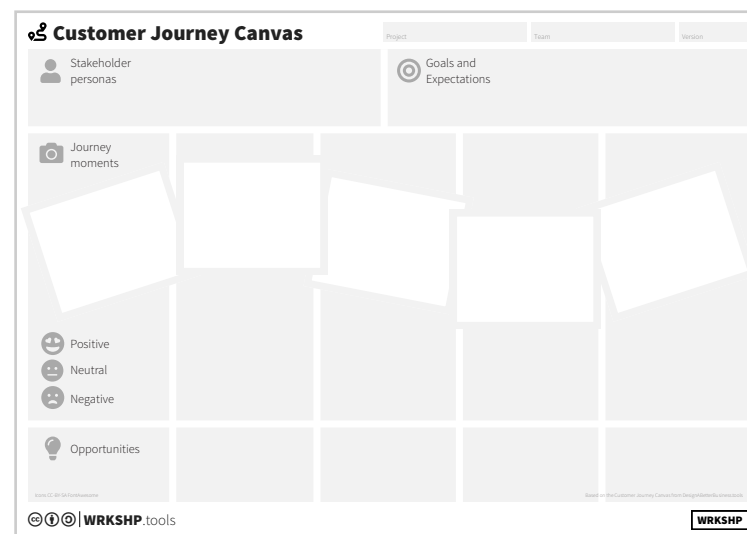
Personas for validation 〉

Personas for storytelling 〉

# **Personas for Design**

The original concept of personas was developed in the 90s to help understand the behaviour of users when they would interact with increasingly complex computer systems. Later, the usage expanded into the domain of what we now call 'service design'.



**The Customer Journey** is one of the main tools in service design. To get more out of it, it can easily be combined with personas.

### The Customer Journey

Personas are an ideal tool when designing complex interactive systems, or service processes.

They help you design from a user centered perspective and help you focus on what is important to your user or customer.

In this sense, personas are a natural complement to that other important service design tool: customer journey mapping. In the customer journey map,

you follow a user through the course of his or her interaction with the system.

When combining the customer journey map with personas, it becomes possible to compare the way different personas will respond to different stages in the customer journey. In that way, you can identify pain points in the journey as they relate to specific personas, and find ways to improve their experience.

Customer journeys in service design are sometimes kept very narrowly focused on the use of the service that is being designed. Using a persona can help you to remind yourself that the user is more than someone who uses the service: they have a life outside of their interaction with your system. They have goals they are trying to achieve, and your system is just one of the options they have of doing that.

Understanding what else is going on in the user's life can give you vital clues defining a better service, and prevent tunnel vision. ∎

The Inmates are Running the Asylum, Alan Cooper

This is Service Design Doing, Marc Stickdorn et al.

# B

# Personas for Marketing and Sales

When marketing or selling a product, you need to be able to influence your prospective customer to buy something. It helps to be aware of the reasons that would help them to make that decision. Of course, this doesn't mean you are trying to get them to do something that is not in their best interest. The best ways to market and sell are based on an intimate understanding of what your customer really needs, and then catering to that need. Personas can be used to do just that.

**Too often, buyer profiles are nothing more than an attractive way to display obvious or demographic data.**

> Adele Revella

Reasons people have for buying or not buying something are often layered. Before making a decision, they will ask themselves several questions.

A good persona for marketing or sales should be able to highlight the reasons potential customers have to make these decisions.

For different personas, the importance of these steps and how they make the decisions in each step can be different, but be sure you need to understand their behaviour in each of these steps.

**1 Recognize a possible solution**
On the surface level, they will need to understand that your solution solves their problem. How do they recognize a solution? What do they find important? What are they looking for? Where are they looking for it?

**2 Assess the quality of the solution**
Once they accept your product as a potential solution, they will wonder if it is actually any good. Does it do the job better than competing solutions? Is it cheaper? They will have different factors that they look at to make a decision.

**3 Assess your trustworthiness**
Next, they will decide if they can trust you. Depending on the type of customer, they will check your references, reviews, and credentials. There are tons of unsubstantiated claims being thrown at people every day, and they will have developed a strategy to weed out the fake ones. It's your job to understand what that strategy is.

**4 Do they like your product?**
Finally, they are almost ready to buy. The only thing that is left is to see whether they actually like your product and company. Do you use the right language and style? Is your brand appealing to them? What will happen to their status?
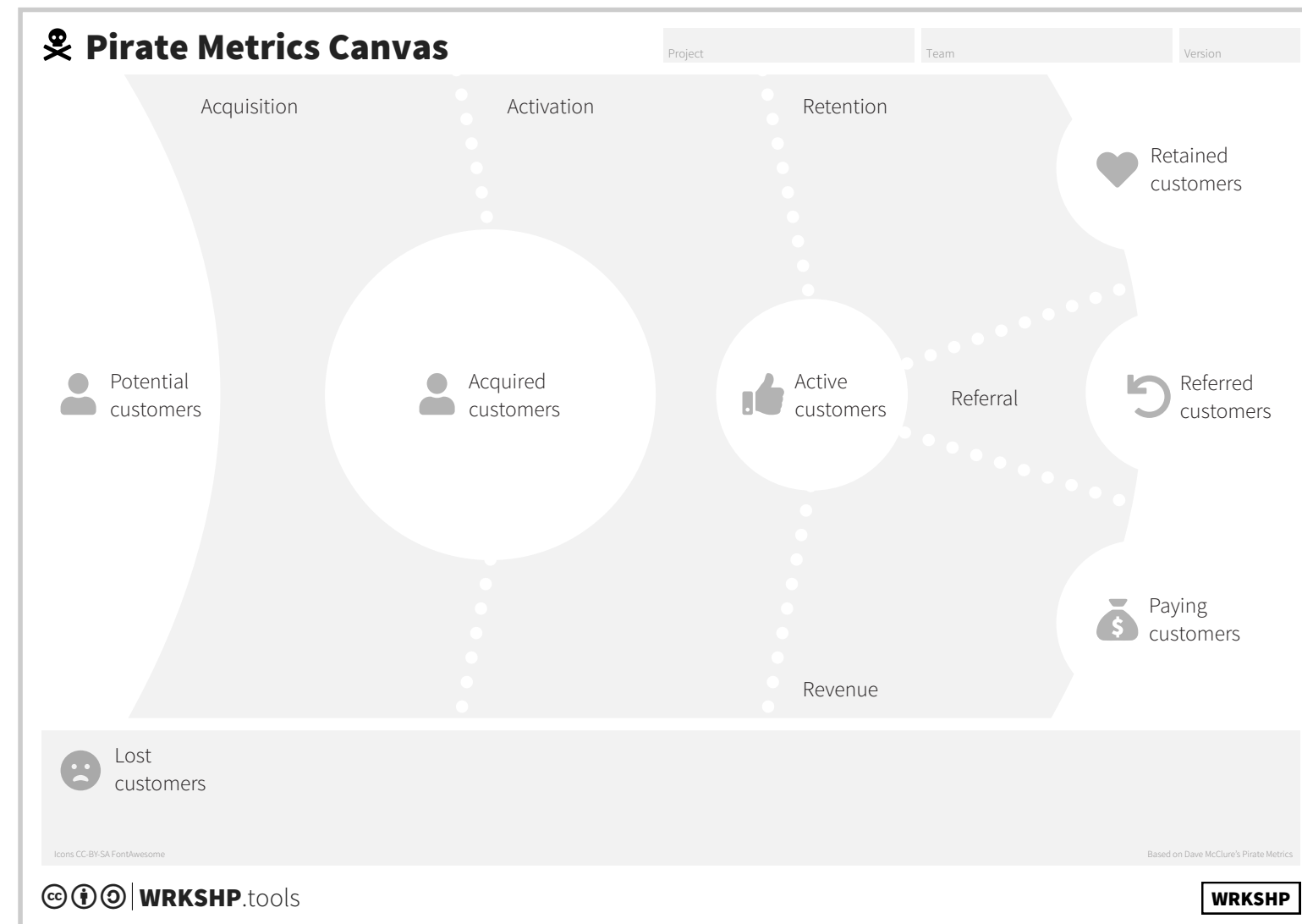
Buyer Personas, Adele Revella >

## Pirate Metrics

Another approach is to look at your marketing and sales funnel. A great way of visualizing this funnel is to use 'Pirate Metrics', developed by Dave McClure, and named for the acronym 'AARRR': Acquisition, Activation, Retention, Referral, and Revenue.

Retention is vital for any service to reduce churn and keep customers longer. It increases growth potential, by reducing the number of customers that leave your service every month. If they don't leave, you won't have to spend time and money replacing these customers.

Using the persona you can figure out what makes people go through the stages in the funnel. What reasons do users have to find your site or product and become 'acquired customers'?



♟ **Pirate Metrics Canvas**

Project · Team · Version

Acquisition · Activation · Retention

Retained customers

Potential customers · Acquired customers · Active customers · Referral · Referred customers

Paying customers

Revenue

Lost customers

Icons CC-BY-SA FontAwesome · Based on Dave McClure's Pirate Metrics

ⓒⓘⓢ | **WRKSHP**.tools · **WRKSHP**

**The Pirate Metrics Canvas.**
This canvas makes it easy to map the different stages (AARRR) of Pirate Metrics. Based on the Pirate Metrics Funnel by Dave McClure.

**The best thing you can do in business is create a customer that creates more customers.**

Pirate Metrics, Dave McClure  ›

What reason do users have to actually start using the product or service? Why would they become active customers? And what are reasons to come back, refer someone else, or become a paying customer? These reasons are super important to map out.

What is also really important is to understand what makes people turn away at each of these stages. What are reasons to leave, cancel a membership, not refer their friends and colleagues. Often, removing such blockers can be very effective.

Below each of the steps is described in a bit more detail.

**Acquisition**
What is attracting your customers to your service in the first place? Where are they finding it? What are they looking for when they stumble upon your solution? Did they read about it? Get a tip?

**Activation**
What is needed for users to start using your service and become 'activated'? Why are your users using the service? What made them decide to do so?

**Retention**
What is needed for them to come back? Or, perhaps more appropriately, what are the reasons people leave your service? This is a vital thing to learn. It may take some effort to learn this from disgruntled users, but it's definitely worth that effort.

**Referral**
What would make them recommend your service to others (i.e. how to get free advertising)? Are there types of persona that are more inclined to do this?

**Revenue**
Finally, what is the reason they spend their hard-earned cash? Knowing this, and linking that knowledge to specific personas, will help you to create a strategy to lower your churn and increase referral and revenue. ∎

**Increasing customer retention rates by 5% increases profits by 25% to 95%.**
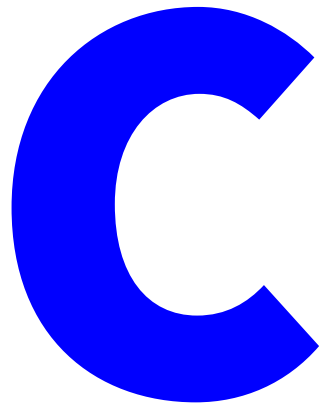
# Personas for Validation

When creating a startup or new product, it is vital to get a good understanding of the problem first. The persona canvas can be used to get a mental model of how people experience the problem. You'll most likely start out with many risky assumptions that need validation, and using the persona canvas to help organize the feedback you get from your customers can give you a head start when designing new experiments.

## Rule Nº 1: There Are No new Facts Inside Your Building, So Get Outside.

> Steve Blank



**The Experiment Canvas.** The Experiment Canvas is an excellent tool to help you structure your validation experiments. It works even better with personas.

To use personas for validation, start by defining your experiment as you normally would. Pick your riskiest assumption and define a hypothesis you want to test.

Then, use your personas to come up with possible responses your target audience may have to your assumption. What would be their perspective? How would they give feedback? How would they behave?

Using personas to do this can help you in two important ways.

### 1 Find the right channels
First, it can give you ideas for cheap, fast methods to test your assumption. For example, if you see that a number of your personas favor a certain online channel, then that channel may be a good place to reach them.

Go over your personas and look for channels, types of interaction, and other preferences to make it

The Experiment Canvas show here is based on Ash Maurya's original design, heavily redesigned to facilitate defining hypotheses.

The Lean Startup, Eric Ries >

4 Steps to the Epiphany, Steve Blank >

**Experiment Canvas**

Personas can help you identify risky assumptions you have about how customers will behave

Personas can help you define better experiments and better questions to ask

Personas can help you define your hypothesis more clearly and identify channels to run experiments on

Three ways in which defining personas can help you to design experiments for customer validation.

It doesn't matter how beautiful your theory is, it doesn't matter how smart you are. If it doesn't agree with experiment, it's wrong.

> Richard Feynman

easier to connect with your test subjects for the experiment.

You can think of social media channels and online forums, but also have a look at influencers they follow or traditional media they use, or even physical locations they visit.

Find those channels that are the easiest for you to reach in terms of money, time, and connections, and then design an experiment with that channel.

**2 Ask better questions**
When you come up with interview questions, or questionnaires, and even when you measure button clicks or other analytics to validate your hypothesis, asking the right questions, with the right copy and look and feel, is very important.

Use your personas to find out how your test subjects are best approached.

What other media are they used to? In what context will they interact with your experiment? What is their preferred use of language? What kind of design are they used to? What are current trends?

You can find out a lot by analyzing the channels and media they already use.

Using this approach it is often possible to come up with more effective experiments that will give you a clearer signal telling you your hypothesis is validated or invalidated. ■

The Mom Test, Rob Fitzpatrick

# D

# Personas for Storytelling

When creating a pitch, presentation, or TED-talk, the first thing to be aware of is your audience. You are not just broadcasting. You need to engage your audience. If your pitch is to be successful, you need to know what is important to your audience, and what points to make. Creating personas for storytelling can take some effort and even feel a little awkward at times, but getting that pitch or presentation right can definitely be worth it.

**The audience does not need to tune themselves to you—you need to tune your message to them.**

> Nancy Duarte
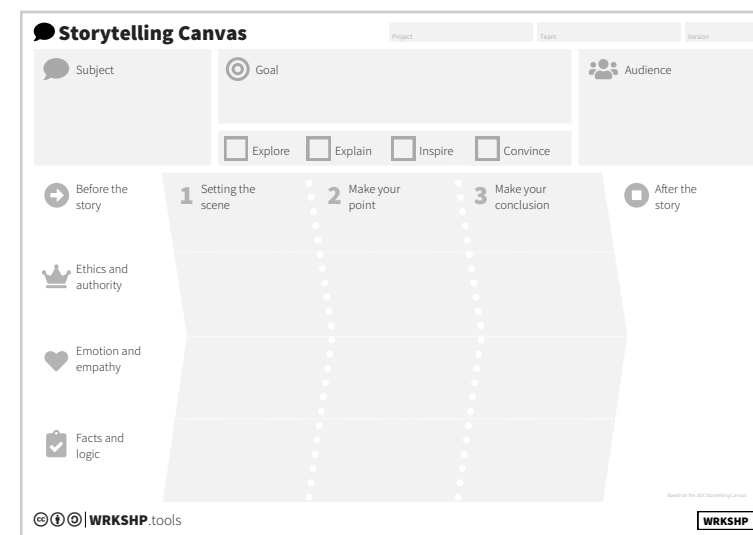


**The Storytelling Canvas.** Your personas for storytelling should inform some important building blocks in the storytelling canvas: the audience, before, and after blocks.

The storytelling canvas works by focusing on the journey your audience will make from the moment before they experienced your story, to afterward.

What do you want your audience to feel, think, and believe once your story is finished?

Knowing the 'before' state intimately is super important. If you know how members of the audience feel going into the story, it becomes easier to engineer the plot points that will change their mind. A persona can help you to map this out.

To make effective personas for storytelling, you need them to help you with two things: knowing who is in your audience, and understanding what they think, know, and feel. Combining these two aspects will help you find ways to influence their state of mind with your story.

Resonate, Nancy Duarte >

Personas help you to define whay you know about your audience more precisely.

What do audience members know about your subject before they hear the story? Why should they care?

What do you want audience members to knw, think, and feel after they heard your story? What will make them think or feel that way?

Three ways in which defining personas can help you to design better and more effective stories in combination with the Storytelling Canvas.

People don't need more information, they need [aha moments](), they need awareness, they need things that actually shift and change them.

> Jack Canfield

**1 Know your audience**
You need to learn everything you can about who is in the audience. If you're speaking for a large group, that may be more difficult, but if you are pitching to three investors, there is no excuse for not doing your homework.

Figure out what kind of person they are. What do they find important? Interesting? What kind of job do they have? How do they prefer to digest new information? Is the group homogenous? Or not? What do they agree on? Or disagree on?

Knowing your audience will help you define the style of your presentation, if it should be factual, sober, energetic, or full of special effects.

**2 What do they know, think, and feel?**
The other thing to do, is to find out what they know, think, and feel about your topic specifically. What do they already know? Are there subgroups that know more? Or less? Why do they care about your subject? Knowing this will allow you to focus the points to make.

You want to find out what specific points audience members need to get their 'aha moment'. Validate your story personas, either by talking to audience members or people who know them well to get an idea of how they will respond to what you are going to do. Do they think that your persona makes sense? ∎

# 8

# Persona Canvas Examples

This section presents two examples of the Persona Canvas, filled out with information that was gathered researching several innovation professionals in the Amsterdam area.

result driven

detailed

holistic

process driven

**Clusters.** While analyzing the interview results, it turned out clustering according to detailed vs. holistic and result vs process driven preferences. Although this is not a complete picture it was good enough to pick at least two starting personas to start validating assumptions.



**The Innovation Manager.** This persona canvas is filled out for one of the identified personas: the innovation manager at a big corporation. In his daily job he encounters a lot of politics and can't move as fast as he'd like – all the while he dreams of starting his own startup.

**Take the first step**

By plotting the first experiment results and translating them into personas it can become more clear what different problems are experienced in the target audience, and how different audience members focus on different aspects of the problem. Some things may be shared among personas, others are highly specific. In subsequent iterations you can sharpen the picture and find out for instance who is most likely to make or influence a decision to buy a solution to that problem.
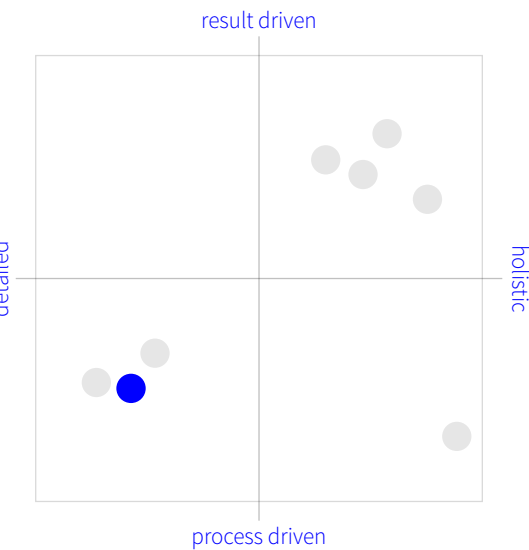


**Clusters.** The second persona is from the other important cluster found from the initial interviews. There may be a third group in the bottom right, but there is not enough data yet: it would be interesting to see if there are more examples to be found.

**The Experiment Designer.** This persona canvas is filled out for the other identified personas: a more process and detail oriented specialist, in this case really focused on running experiments, getting user feedback, and understanding data.

# Got time? Extra reading!

### The Inmates are Running the Asylum
Adam Cooper

Insightful and entertaining, The Inmates Are Running the Asylum uses the author's experiences in corporate America to illustrate how talented people continuously design bad software-based products and why we need technology to work the way average people think.

### Visual Meetings
David Sibbet

Just as social networking has reclaimed the Internet for human interactivity and co-creation, the visual meetings movement is reclaiming creativity, productivity, and playful exchange for serious work in groups.

### This is Service Design Doing
Marc Stickdorn, Markus Edgar Hormess, Adam Lawrence, Jakob Schneider

How can you establish a customer-centric culture in an organization? This is the first comprehensive book on how to actually do service design to improve the quality and the interaction between service providers and customers.

### Thinking Fast and Slow
Daniel Kahneman

In the international bestseller, Thinking, Fast and Slow, Daniel Kahneman, the renowned psychologist and winner of the Nobel Prize in Economics, takes us on a groundbreaking tour of the mind and explains the two systems that drive the way we think.

### The User is Always Right
Steve Mulder, Ziv Yaar

How do we ensure that our Web sites actually give users what they need? What are the best ways to understand our users' goals, behaviors, and attitudes, and then turn that understanding into business results? Personas bring user research to life and make it actionable, ensuring we're making the right decisions.

### Jobs To Be Done
Stephen Wunker, Jessica Wattman, David Farber

In a challenging economy filled with nimble competitors, no one can afford to stagnate. Only 1 in 100 new products are successful enough to cover development costs, and even fewer impact a company's growth trajectory. So how do you pinpoint the winning ideas that customers will love?

### The Mom Test
Rob Fitzpatrick

They say you shouldn't ask your mom whether your business is a good idea, because she loves you and will lie to you. This is technically true, but it misses the point: you shouldn't ask anyone if your business is a good idea. It's a bad question and everyone will lie to you at least a little . As a matter of fact, it's not their responsibility to tell you the truth. It's your responsibility to find it and it's worth doing right.

### Resonate
Nancy Duarte

Presentations are meant to inform, inspire, and persuade audiences. So why then do so many audiences leave feeling like they've wasted their time? The author's approach is simple: building a presentation today is a bit like writing a documentary. Using this approach, you'll convey your content with passion, persuasion, and impact.

### Buyer Personas
Adele Revella

Buyer Personas is the marketer's actionable guide to learning what your buyer wants and how they make decisions, written by the world's leading authority on buyer personas.

# Now make it personal.