

To be able to segment your visitors effectively, you may need to research the market. The information that you obtain through research helps you define personas that reliably represent your visitor base. You can then design your websites to tailor each of the persona's needs.

The ideal number of personas

The number of personas that your websites need depends on the business model that you use. In most cases, sticking to as few personas as possible may be the best approach. The recommended number of personas is usually 2 to 5.

Designing personas

Consider the following steps when creating personas for your sites:

1. **Identify** the people that represent your website visitor base, you will study these further.
2. **Research** how the people that you identified work.
3. Create **behavior characteristics** based on the information that you have.
4. **Categorize** visitors into groups based on the behavior patterns that you created.
5. **Develop complete personas** based on the groups that you identified. Use the information that you gathered to describe the personas as much as you can. You can include the following information:
 - Narrative description
 - The persona's usual workflow
 - Behavioral patterns
 - Technical skills
6. Create the personas in the **Personas** application.
7. Make sure the people that get to work with these personas get acquainted with the personas and understand them.

Creating a new persona in the system

To create a new persona:

1. Open the **Personas** application on the **Personas** tab.
2. Click **New persona**.
3. Fill in the **Persona name** and **Description**.
4. Define a **Point threshold** that contacts have to reach to be assigned to the persona. You will define the rules for this threshold later.

Every contact can only be in a single persona at a time. The system assigns each contact to the persona the contact fits the most. For example:

- You have two personas in the system, a **Patient** persona (Point threshold 90) and a **Visitor** persona (Point threshold 100).
 - A contact reaches 98 points for the **Patient** persona and 112 points for the **Visitor** persona.
 - The system evaluates that the contact exceeds the *Point threshold* for the **Patient** persona by ~8.8% and for the **Visitor** persona by 12%.
 - The system assigns the contact to the **Visitor** persona as it exceeds this persona's Point threshold more than it does for the **Patient** persona.
5. **Select image** for the persona.



Managing the available persona images

Administrators can manage the existing persona images in **Modules** (application) -> **Personas** -> **Classes** -> **Persona** -> **Thumbnails**.

6. **Save** the persona.

Now that you created a persona, continue to [defining rules](#) for it.


Defining persona rules

Each persona needs to have at least one rule. Rules define the criteria that [contacts](#) have to meet in order to be assigned to a persona.

Generally, there are two types of rules:

- **Explicit** – such as contact's **age**, **gender**, **origin**. For example, you may want your **Foreigner** persona to have a rule that assigns points to contacts if they visit your websites from abroad.
- **Implicit** – [activities](#) that contacts perform on the websites. For example, you may want your **Visitor** persona to have a rule that assigns points to contacts if they visit your 'Getting here' page.

To define a persona rule:

1. Open the **Personas** application on the **Personas** tab.
2. **Edit** () the persona for which you want to create a rule.
3. Switch to the **Rules** tab.
4. Click **New rule**.
5. Specify the following:
 - **Rule name** – the persona rule name used in the system.
 - **Points** – define the number of points that contacts receive once they meet the criteria of this rule. Once contacts reach the point limit defined for this persona, they are assigned to the persona.
 - **Rule type** – select one of the following:
 - **Attribute** – an explicit (static) characteristic of the contact. For example, the state or country the contact lives in.
 - **Activity** – an implicit characteristic. That is an activity that the contact performs on the sites. For example, making a purchase or submitting a form.
 - **Macro** – a macro [condition](#) that the contact has to fulfill to obtain points for this rule. You can create complex macros that combine both *attribute* and *activity* type of rules in one condition.
 - **Rule settings** – specific properties of the selected **Rule type**.
6. Click **Save** to confirm the new rule.

The system creates the rule. Contacts that meet the criteria of the rule are now assigned the according amount of **Points**.



Using form data in persona rules

You can use the information visitors [enter into form fields](#) to create persona rules.