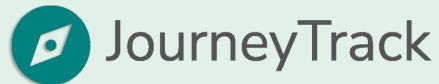Whose persona
is it anyway?

Meet Our Speakers

Ania Rodriguez
Founder and CEO,
Key Lime Interactive and JourneyTrack

Sally Cohen
Director of User Experience,
Infoblox

Personas are defined differently across the organization

Consumer Segmentation & Personas are Complimentary

Segmentation

Separates audiences by characteristics such as clusters of personas based on:

- Demographics
- Psychographics
- Decision making patterns
- Historical experiences

Insights into **Life Goals**

Personas

Provides an archetypical description of an audience highlighting their:

- Behaviors
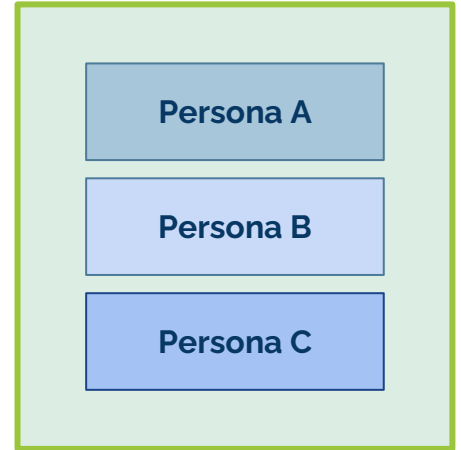- Attitudes
- Goals

Experience Goals
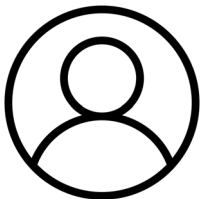What they want to feel when using a specific product

End Goals
What they get out of a well designed product/service

Relationship

Relationship between segmentation models and personas can be 1 to many or 1:1.

Persona A

Persona B

Persona C

Persona Name

Goals
- A task that needs to be completed
- A life goal to be reached
- Or experience to be felt

Motivation

Incentive

Fear

Social

"A quote that captures the persona's personality."

Frustrations
- The challenge this user would like to avoid
- An obstacle that prevents this user from achieving their goals
- Problems with the available solutions

Age:
Work:
Family:
Location:

Brands & Influencers

Personality

Bio
The bio should be a short paragraph to describe the user journey. Include history leading up to a current use case. Highlight factors of the user's personal and professional life that make this user an ideal customer of your product.

Preferred Channels

Online & Social Media

Traditional Ads

Referral

Introvert   **Extrovert**

Sensing   **Intuition**

Marketing Personas focus on...

Demographics

Broad goals

Personality traits

Preferred channels

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Sarah Link

Background/ Demographics

Job/Career Path/Family/Lifestyle/ Age/Income

- Fact Item
- Fact Item
- Fact Item
- Fact Item

Real Quotes
Goals, Challenges

Goals/Challenges
What does this person struggle with? Roadblocks to success?

Identifiers
Goals, Communication preferences? Social media platforms

What can we do?
..to help this person achieve their goals? To help them overcome their challenges?

Marketing Message
How can you describe your solution to have the biggest impact on your persona?

Marketing Personas focus on...

How to help achieve goals/overcome challenges

Target market messages

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Bio: Who is this person? Personality, habits, preferences, values, life goals, expectations, stage of the journey. What makes this persona ideal for your product or service?

Background

Age:
Occupation:
Industry:
Education:
Location:

Interests
Hobbies, activities, interests

Goals
Goals to achieve tasks, experiences to live, life goals to achieve

Frustrations
Obstacles that prevent from reaching goals

Information Services Where do they go for information? When?

Keywords to Use for Search Engines What search terms do they use for product/service/experience?

Content Preferences Do they prefer blogs, influencer endorsements, videos, Facebook groups?

Social Media Preferences

Influencers Who do they follow? Does this affect their purchasing decisions?

Favorite Brands

Main Objections What are the most common barriers to overcome?

AWARENESS

Videos challenges, competitions, eBooks, webinars

CONSIDERATION

Case studies, reviews, webinars, FAQs, demo videos

DECISION

Vouchers, demos, estimates, chat, free trials

HOW WE CAN HELP

What is your key message for this persona?

Marketing "Content" Personas focus on…

How they use search engines

Their authority to make decisions

Buyer's Content Journey

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Brian Glines

28 years old   Tech
Writer
Brooklyn, NY   Engaged

Diligently Saving
"I want to do everything online!"

Back Story
Brian is 28 year old Tech Writer for a large software company.

He does everything online. He grew up with the internet and expects every transaction he has as a customer to be easy and fluid as Amazon.

Goals
- Create and monitor budget
- Start saving for retirement
- Pay for my wedding
- Pay off car loan

Information Needs
- I want to evaluate costs of account services
- Know the nearest branch with ATMs
- Manage and view account balances

Main Tasks

Banking
- Receive monthly account transactions
- Transfer funds
- Create budget and monitor progress

Investment
- Learn more about investing
- Monitor and manage options

Who/Where do I go for advice?
- Family
- Fiance
- Friends

What device do I use most often?
- Laptop
- Phone

What do I mostly do on my devices?
- Email
- Video Games
- Social Media
- Spotify

UX / Behavioral Personas focus on...

Main tasks / Job-to-be Done

Their resources

How they solve problems

How a user interacts with the product

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Personas are used differently for UX & Marketing

Priority	Varies according to UX vs. Marketing priorities		
Persona	Arin the Security Analyst	Nathan the Security Admin	Sandy the CISO

What UX wants to track

What Marketing wants to track

UX Priorities

Priority	Most Important	Secondary	Secondary
Persona	**Arin the Security Analyst**	**Nathan the Security Admin**	**Sandy the CISO**
Key Tasks	**Investigates security alerts** **Generates security reports** **Creates cases for Security Admin**	**Updates security policies** **Reformats endpoints**	**Reviews security reports**
Success Criteria	**Provides expertise** **Increases confidence** **Increases efficiency**	**Increases efficiency** **Easy to learn**	**Increases operational effectiveness**
Pain Points (Different values are more important)	**Must investigate too many false alarms**	**Must log into too many different systems**	**Staff turnover due to burnout** **Cannot hire enough experts**
How to Optimize their Experience	*Enable him to detect and eliminate breaches quickly*	*Simplify his process for remediating threats*	*Increase her confidence in operations and security posture*

Marketing Priorities

Priority	Secondary	Secondary	Most Important
Persona	**Arin the Security Analyst**	**Nathan the Security Admin**	**Sandy the CISO**
Role in Cybersecurity Purchasing Decisions	Very indirect	Almost no input	The primary decision-maker
Purchasing Criteria	Compatible with other tools in ecosystem Provides up-to-date threat intelligence	Compatible with other tools in ecosystem	How a product improves security posture Reduces need for additional headcount Minimizes operational cost
Pain Points (Different values are more important)	Too many false positives Does not identify attack before it spreads	Have too many tools Must work long hours	Worries about company and brand reputation Spends too much money on the "latest" solution
How to Delight	*Show him how it cuts out bad alerts*	*Show him how it streamlines his work*	*Show her the value for her money*

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How can we collaborate with UX & Marketing in persona creation?

Charlie Customer

Platinum card holder

" No matter what comes my way, I can handle it. Both at home and at work, I am always in control and I thrive in stressful environments. Ambition is my middle name - I'm competitive by nature, and I find that often, my best competition is myself. As a small business owner, I do whatever it takes to get the job done, and I believe that it's more important to be successful than to be liked. "

The basics

Age
51

Occupation
Small software company CEO

Location
Silicon Valley, CA

Household income
$200,000

Who is Charlie?

After working for **15 years as a lead developer** for a global tech enterprise, Charlie and a colleague decided to strike out on their own. They **founded their own small software company**, and within months of launching, secured their seed funding round.

Charlie knows what he's doing and **craves control and autonomy** at this point in his life. He is a true **entrepreneur at heart**, and even though he is working on his first tech startup, he has successfully led the creation of several other social and volunteer communities and also contributes his time and knowledge to the developer forum Stack Overflow (he has over 15,000 privileges on the site). While Charlie's experiences have given him a deep understanding of software and business, he **dislikes dealing with financial institutions that don't seem to understand someone like him**. He wants to be able to access his myriad accounts, move assets around, and monitor his accounts on the go quickly and easily, but he's **not a digital native**. Without nimble and easy systems to meet him where he is, he worries he won't be able to scale his new business as seamlessly as he'd like.

Charlie's goals

- Develop a more streamlined budget for software company that includes research, development, design, hosting, marketing, office space/computers, payroll, legal, and conference travel.
- Travel somewhere new with wife and kids each year utilizing only credit card points for all air travel and hotel stays.
- Prepare for series A funding within the next 2 years.
- Save to buy beach house and wife's dream car while also putting aside enough for retirement and kids' college funds.

Charlie's personality

Introvert ————————●————————— Extrovert
                           53

Sensing ————●——————————————— Intuition
         27

Thinking   Feeling

JourneyTrack

Charlie's goals

- Develop a more streamlined budget for software company that includes research, development, design, hosting, marketing, office space/computers, payroll, legal, and conference travel.
- Travel somewhere new with wife and kids each year utilizing only credit card points for all air travel and hotel stays.
- Prepare for series A funding within the next 2 years.
- Save to buy beach house and wife's dream car while also putting aside enough for retirement and kids' college funds.
- Recruit top talent to software company
- Be able to find any financial information he's looking for - both personal and professional - within 10 minutes max.

Charlie's personality

Introvert		Extrovert
	53	

Sensing		Intuition
27		

Thinking		Feeling
18		

Judging		Perceiving
	39	

Market Segments

🎂 Age

| Total 45-54 | ▼ | 20 | % |
| Total 55-64 | ▼ | 50 | % |

💲 Income

| $150,000 to $199,999 | ▼ | 60 | % |
| $200,000 or more | ▼ | 40 | % |

👤 Race

White	▼	65	%
Black or African American	▼	15	%
Two ore more races	▼	20	%

🎓 Education

Associate's degree	▼	5	%
Bachelor's degree	▼	80	%
Graduate or professional degree	▼	15	%

Favorite brands

- TECH: Apple, Amazon kindle, Google workspace
- CLOTHES: Brooks Brothers, Banana Republic, Saks Fifth Avenue

Charlie's knowledge

Technology

| | 79 | |

JourneyTrack

Race

White	65	%
Black or African American	15	%
Two ore more races	20	%

Education

Associate's degree	5	%
Bachelor's degree	80	%
Graduate or professional degree	15	%

Favorite brands

- TECH: Apple, Amazon kindle, Google workspace
- CLOTHES: Brooks Brothers, Banana Republic, Saks Fifth Avenue
- CARS: Lexus, Porsche, Audi, Tesla
- FOOD & HOME: Trader Joe's, Whole Foods, Crate & Barrel, Williams Sonoma
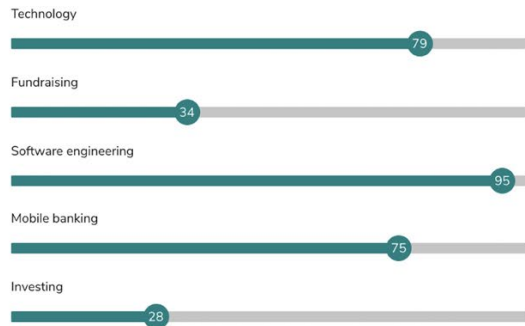
Preferred Channels

- SOCIAL MEDIA: contributes to Stack Exchange & Linkedin, follows influencers
- CONTENT MARKETING: prefers brands that know what they're talking about
- PARTNERSHIPS: Trusts brands that put their trust in others too

Primary motivators

Power

70

Fear

44

Charlie's knowledge

Technology

79

Fundraising

34

Software engineering

95

Mobile banking

75

Investing

28

Main tasks

- BANKING: access monthly account statements, transfer funds between accounts, search and view transactions, create and monitor budgets
- VENTURE CAPITAL: legal advice, negotiate and structure VC agreements, ensure regulatory compliance, keep as much investment capital liquid as possible
- INVESTMENTS: diversify investments by moving some assets from tech to healthcare, open whole life insurance policies for all family members, open Roth IRA for wife
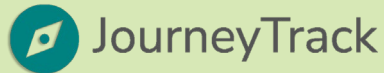
JourneyTrack

Takeaways

1. **Collaborate**

2. **Use a shared platform**

3. **Iterate and refine**

Thank You!

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