

# creating a customer persona



## HOW A CUSTOMER PERSONA CAN HELP YOU CREATE BETTER CUSTOMER EXPERIENCES AND SERVICES.

No doubt you already have a good understanding of your most important customers. You know their demographics and possibly also their psychographics. You know how they tend to behave and what they need. You may ensure that you're regularly asking customers what they want. You create initiatives to support specific segments armed with all this information.

Yet even after doing 'everything right' a new initiative can fail to gain real traction with customers. Creating successful and profitable initiatives becomes even more challenging as we try to anticipate future services. Our customers are dealing with a fast changing world – just as we are. They are becoming increasingly demanding, influential and vocal. It is becoming imperative for us to respond and adapt quickly to our customers and to create initiatives that address their future as well as their current needs. But how do we anticipate our customer needs before they are able to tell us?

In today's fast changing world understanding our customers is no longer enough. We need to be able to extend our understanding to translating, exploring and challenging their needs in context of their relationship with our business.

Creating personas helps us build a richer and deeper understanding of our customers, their current and future wants and needs. Creating personas is the first step to putting ourselves in the shoes (and minds and hearts) of our customers. Step two is creating an empathy map (understanding how they experience the world). Step three is customer experience and utility (understanding their experience with our industry or business).

## WHAT IS A PERSONA?

A persona is not a real person or an average customer. A persona is a 'fictional' but realistic representative of a specific customer segment (or sub segment) that fits the specific characteristics of that segment (eg: demographics and psychographics).

A persona will help you facilitate a deeper discussion with the marketing, customer service and/or leadership team than can be achieved by market segment and demographic information alone. It allows everyone to step into the customers shoes and collectively challenge assumptions about what a customer may need or how they may choose to engage with our business. When creating new services or customer experiences ideas you want to investigate those ideas from the perspective of various personas.

## STEPS TO CREATING A GOOD PERSONA

Prior to planning new initiatives, it's important to create a suite of personas that reflect each of your customer segments. Don't try to create one persona that represents a range of segments.

### **Step one: decide the suite of personas**

Meet with your team and discuss your various segment groups (and subgroups). Make sure that you create at least one persona to represent each key customer segment. Give each member of the team a persona for them to create (and later share with the team). You can create more than one persona for a segment (as long as each key segment is covered).

### **Step two: write persona**

Use the persona template to compile a portrait of a typical person that represents the customer segment you're representing.

Refer to any relevant and available demographic or psychographic data specific to your segment. Use this data as a guide but remember that you want to get into the head and heart of your persona not just their demographics.

To build your persona follow these steps:

1. Find a photo (ideally from a magazine) that represents your persona
2. Give your persona a name
3. Write down 'who am I?' (age, profession, nationality, \$salary, marital status, family etc)
4. Once you have a picture in your head of who the person is, start putting yourself in their shoes. Imagine what it may be like to be that person. What are their interests and skills? What type of personality do they have? What are their aspirations and dreams for the future? What type of social environment do they have around them? What are their values and motivations?
5. Remember: it's important to get a real feel for the person so as you can see their perspective, motivations and values (as opposed to your own).
6. Once you feel you've got into the headspace of the persona look to the top boxes and write down three reasons this persona would engage with your business and three reasons they would not.
7. Feel welcome to add additional information that's not included in the template.
8. Bring your persona with you to the workshop. Be ready to talk to your group about your persona. It's possible it will be one of the personas used to then create a customer empathy map and the buyer experience/utility map.

Questions? If you have questions about completing this persona please feel welcome to contact Robynne Berg on 0407 316 052 or [robynne@bergconsulting.com.au](mailto:robynne@bergconsulting.com.au)

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