Personas: Harnessing the Power of Empathy to Understand Audience Needs

NABE Webinar

June 17, 2015

[bt]⁺ | Brand Therapy
Introduction…

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We are an insights, strategy and ideas workshop devoted to creating healthy, sustainable brand relationships.
Agenda

What are Personas?
High Level Process
Some Benefits for Associations
What are Personas?
Personas aren’t really new...
“Personas are not real people, but they represent them throughout the design process. They are hypothetical archetypes of actual users. Although they are imaginary, they are defined with significant rigor and precision.”

— The Inmates Are Running
The Asylum, 1998
Analysts love them. They’ve become a hallmark of customer-centric thinking.
They capture the **totality of a person**, all the emotional details that make people relatable to us…
Personas aren’t...

- Segments
- Stereotypes
- Average users
- Roles
Examples of how they look are all over the web...
In general, they all contain similar information...

1. Name, age, gender, location, marital status
2. Education and socioeconomic class
3. Media habits, digital fluency, social media behavior
4. Goals, opinions and attitudes towards specific brands, products, etc.
5. Tasks, pain points, environmental factors
But this isn’t really the story…

Personas, and the benefits they offer organizations, are much more than what’s contained in a document.
The real value of Personas lies in something bigger…
Empathy provides *context* for separating what’s meaningful from what’s just information, what’s signal from what’s noise...
These days it seems like everyone’s convinced the answers come from the data…
But data, even in such convincing quantities, doesn’t seem to get rid of all of our challenges.

Information ≠ Insight
As a pioneer once said,

“Not everything that can be counted counts, and not everything that counts can be counted.”
Empathy lets us balance analytical thinking with emotional intelligence and intuition...
We are able to make more powerful observations...

**Most Personas**

- What attributes describe them?
- What characteristics divide them into groups?
- What purposes do they serve in our world?

**Empathy-Based Personas**

- What’s inside their *individual* heads?
- What makes them *tick*?
- How do they evaluate things, make *choices*?
- How do they *form and nurture* relationships?
Instead of just *describing* audiences and creating a profile like this...
We can create detailed stories about real people we know and we can identify with.
Empathy by itself is a personal experience...

It becomes transformational when it happens in a group working together.
“Empathy will be like literacy was in the 1300s. Without it, one will be marginalized and unable to function professionally.”

Bill Drayton, founder of Ashoka, the world’s largest network of social entrepreneurs
How We Create Personas
Personas are useful across a wide range of applications…

- **Focused, Tactical**
  - Web Redesign
  - Digital/Social Campaign
  - Content Strategy
  - Marketing Campaigns

- **Big Picture, Strategic**
  - Product Development
  - Digital/Social Strategy
  - Brand Strategy
  - Strategic Planning
All personas begin from real data, like this…

- Membership is predominantly male, 90%
- Over half are between 45 and 65 yrs old
- 97% are Caucasian
- Less than a quarter are under 45 yrs old
- Over four-fifths are married
- Two-thirds do not have children in the home
- Over half live in suburbs outside a major city
- Almost two-thirds of members have worked in the field for over 20 years (18 is the avg.)
- Most members are career agents who have worked primarily with a single company
- Almost all do the bulk of their business with life, annuities, long term care, or disability
- Over two-thirds generate from $150k to $1M
- Three-quarters of members have 2 or less employees in their firms
- Almost two-thirds of former members cite cost as the reason they left
If possible, nothing beats observing audiences in their own habitats...
The closeness can reveal a lot about what’s important to them and how they see value...
We’re looking for patterns…

What we can measure…

Demographics
Web behavior
Purchasing
Social activity

What helps us find Empathy…

Emotional drivers behind preferences
Connections
Tastes
Attitudes and Values
We create a *Persona Model* with dimensions that reflect the data, but also begin to feel more personal, less formal…

| I seek out thought leadership for… |  |
|-----------------------------------|  |
| New and interesting discoveries    | Ways to improve my game |

| I like belonging to organizations because of what… |  |
|---------------------------------------------------|  |
| I personally gain from them                      | Membership says about me |

| When I finish or accomplish something, my first instinct is to… |  |
|----------------------------------------------------------------|  |
| Look for another mountain to climb                 | Sit back and enjoy the view |

| Technology is woven throughout life, and my approach is… |  |
|----------------------------------------------------------|  |
| Old school, I print my emails                           | I just tweeted an app for that |

| At times, I’m more likely to trust people because of…    |  |
|----------------------------------------------------------|  |
| Their qualifications and credentials                     | Our shared values and background |

| When facing tough times, I often draw strength from…   |  |
|---------------------------------------------------------|  |
| Conviction in my beliefs                                | Remembering others depend on me |

| The world is changing and evolving every day, and I’m…  |  |
|--------------------------------------------------------|  |
| Optimistic and excited by it                            | Skeptical and cautious because of it |
We create a number of skeletons, which we eventually narrow down to three or four...
In workshops, we ask...

- Which ones keep us up at night?
- Are they too stereotypical? Too out there?
- Are any biases at work here?
- Which seem the most true?
- Do they reflect the research?
Underlying everything, is a fundamental question…

Who are *the most important people* for addressing the specific issue at hand?

Current audiences, ones we already know and try to serve

*and*

New audiences, emerging ones we think may be important
Once we’ve settled on a smaller set, the real fun begins…
We put ourselves in their shoes, and role-play...
We brainstorm about things like their…

**Motivations** — the reason or reasons audiences have for acting or behaving in a particular way; what fuels their the general desire or willingness of someone to do something

**Fears** — audiences’ feelings of anxiety concerning the outcome of something or the safety and well-being of someone

**Frustrations** — their feeling of being upset or annoyed, especially because of their inability to change or achieve; things that prevent their progress, success, or fulfillment of something

**Aspirations** — audiences’ hope or ambition for achieving something; the object of their ambitions; their goals
Discussion can get a bit spirited, and this is good...
It indicates we’re connecting with the personas in an authentic and real way…
When we’re done we have the raw material about four “real” people.
Expert and Reliable
Susan
The Seasoned Pro

Female Agent, 54, 18 years selling, St. Louis, MO

See, people are looking for more than property, they're looking for a lifestyle. Most of my business is from referrals and repeat business from past clients and friends. It's the best compliment anyone can give me. I use email, of course, and the MLS, but I'm fairly traditional. I tend to stick to the ‘old school’ methods that have made me successful. People trust me, I make good deals, what else is there?

WHAT I THINK ABOUT MY JOB AND THE COMETITION
I like the professional life I’ve made for myself. I have my style and my reputation, so I don’t worry too much about competition. (Well, maybe a little, with the MLS, but it’s not too bad.) And more, they feel they can trust me. There’s not much that fazes me.

WHAT I THINK ABOUT THE NAR
I know the NAR is there, but I’ve been at this for so long, I don’t see much use for more than my state and local boards.

That we can turn into a tangible tool we can use...
Some Examples of How This Approach Benefits Organizations
1. It helps us see clearly the breadth of the audiences at play.
It helps us see where we’re strong and where we’re weak…

On the radar

Brenda
- Intense runner, 45
- A “true believer”

Heidi
- Competitive runner, 28, a transplant from NYC
- Very focused on herself

Larry
- A returning runner, 50
- Runs for fitness, to maintain his health

Beverly
- Casual fitness runner, 34
- Runs for fun, stay fit, to connect with friends

Not really on the radar
Larry
Fitness runner, 50, married, 16 year old son, owns in Western Suburbs, Master’s degree, operations manager in manufacturing.

My best buddy had a heart attack four years ago and it made me realize that I needed to lose a few pounds, and improve my diet. I trained for a local 5K and have set my sights on the half marathon. I love it. On Monday, I’m already looking forward to my Saturday run with my friends. I’ve started to do a bit more research on ways to train properly. I don’t seem to get any faster but I’m learning about the importance of speed work, tempo and distance runs. I’m thinking maybe one of the training programs might help take me to the next level. And be a fun way to meet new people I can learn from.

“Life is full of second chances — you just have to see them as the opportunities for growth they are”

Helping us remember different people have different goals.
We can start to see the different ways the organization is providing value to people.
2. It helps us tap into our own internal knowledge of how the world *really* works.
Personas help us harness latent internal knowledge…

Known anecdotally but never defined explicitly
We can better understand their needs...

<table>
<thead>
<tr>
<th>Anthony</th>
<th>Susan</th>
<th>Allen</th>
<th>Maggie</th>
</tr>
</thead>
<tbody>
<tr>
<td>+ I’m ambitious, assertive; not one to sit around</td>
<td>+ I’m a people person; I make dreams come true</td>
<td>+ I have to think about the bigger picture</td>
<td>+ I like my members and I want to them to succeed</td>
</tr>
<tr>
<td>+ I want to have it all</td>
<td>+ I like that I know what I’m doing, but I still want to learn some new tricks</td>
<td>+ I’m looking for help, not just tips, something more practical, how-tos</td>
<td>+ I see myself as a conduit of information; I help the flow</td>
</tr>
<tr>
<td>+ I’m looking for opportunities to make a name for myself</td>
<td>+ I’m mature, I’m not so frightened by this storm</td>
<td>+ My community’s important to me; I want to improve it</td>
<td>+ I’m a professional, and I want to keep improving</td>
</tr>
<tr>
<td>+ I’m here to win</td>
<td></td>
<td>+ Help me and guide me as I grow my business</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>+ Give me a coherent and unified voice for our industry</td>
<td>+ Make my job easier</td>
</tr>
<tr>
<td></td>
<td>+ Help me succeed; give me what I need to soar</td>
<td>+ Give me practical information like trends, policies, etc. that I can use today</td>
<td>+ Help my members</td>
</tr>
<tr>
<td></td>
<td>+ Treat me like a go-getter; appreciate me</td>
<td>+ Allow me to extend my reach, but in a way that works with my style, social and conversational</td>
<td>+ Make it easier to find everything in one place</td>
</tr>
<tr>
<td></td>
<td>+ Give me a place where I can shine</td>
<td></td>
<td>+ Save me time, make me more efficient, involve me more</td>
</tr>
</tbody>
</table>
3. It gives us the perspective to see things that should be obvious.
Empathy helps us see opportunities we might overlook…

- Brenda: Intense runner, 45
- Heidi: Competitive runner, 28
- Larry: A returning runner, 50
- Beverly: Casual fitness runner, 34

...by questioning unconscious biases
Emerging Potential

Beverly

Casual fitness runner, shoots for finishing a run. 34, kids, single, owns in Berwyn. Some grad classes, a commercial realtor.

When I was younger, I could eat whatever I wanted from my grandparents’ bakery; now not so good. I started walking and then jogging because it was a cheap, easy way to control my weight. I joined a gym nearby and started taking spinning classes. Two of the teachers are amazing, and a few of us developed a cult-like following. Several of the regular women also like to run, and they encouraged me to start running. I’m up to about 12 miles a week. I don’t really consider myself a runner, but I can see how people get hooked. These packs of runners on the lakefront look like they’re having a blast.

“I’m an expert at sneaking in a little me-time, as I quietly solve everyone else’s dramas — I have to be!”

<table>
<thead>
<tr>
<th>MY ASPIRATIONS</th>
<th>MY MOTIVATIONS</th>
<th>MY FEAR, CONCERNS</th>
<th>MY FRUSTRATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintain financial independence</td>
<td>Make friends</td>
<td>Ending up alone</td>
<td>No running programs in area</td>
</tr>
<tr>
<td>Be a good mom</td>
<td>Provide for children</td>
<td>Safety; neighborhood crime</td>
<td>Working hard and having little to show for it</td>
</tr>
<tr>
<td>Get my teeth fixed</td>
<td>Good relationship with kids</td>
<td>Being accepted</td>
<td>People who aren’t reliable</td>
</tr>
<tr>
<td>Go to a good college</td>
<td>Go to the gym</td>
<td>Hair, skin, physical appearance</td>
<td>Need more running paths</td>
</tr>
<tr>
<td>Make it through the day</td>
<td>Be youthful</td>
<td>Weight gain</td>
<td>Crazy economy, low market</td>
</tr>
<tr>
<td>To be a good role model</td>
<td>Community; connections</td>
<td>Poor public schools</td>
<td>City services; infrastructure</td>
</tr>
<tr>
<td>Get fit &amp; stay fit; do a 5K</td>
<td>Be youthful; stay attractive</td>
<td>Losing job, the economy</td>
<td>Having to do everything</td>
</tr>
<tr>
<td>Raising good kids; get them into a good college</td>
<td>Happiness / Health / Balance</td>
<td>Paying for school</td>
<td>No time to go out with friends</td>
</tr>
<tr>
<td>Meet good guy and remainry</td>
<td>Setting good example</td>
<td>Managing it all, exhaustion</td>
<td>Having to start over</td>
</tr>
<tr>
<td>Finding time for myself</td>
<td>Be successful</td>
<td>Poor sales, failure</td>
<td></td>
</tr>
</tbody>
</table>

A small shift in thinking can make a huge difference.
4. It helps build a connection with new, different, or elusive audiences.
Associations often serve dramatically different sets of interests...

+ A 43-year old academic originally from China; married with two kids
+ A 45-year old product development researcher for a multinational ingredients firm; married with kids
+ A 30-year old single compliance specialist new to industry
+ A 54-year old sensory expert in food manufacturing; married with older kids
We can better understand their very specific needs…

+ Being an academic is his calling; he’s *passionate* about his research and it occupies a lot of his attention
+ He’s in tune with the relationship between academia and industry and the exchange of *ideas* and *funding*
+ He’s smart and resourceful and is looking for opportunities to *showcase* his work
Helps us understand the members that will move the organization forward.
We can bridge cultural gaps with more respect and sensitivity…

- A 29-year old single captive agent in South Korea, new to the business
- She exhibits several millennial traits: optimistic yet skeptical of institutions; eager to make the “right” decisions; tech savvy, social, and independent
- She’s very focused on developing all the advantages she can to establish a presence at her company and the business. She looks at most things through very pragmatic glasses
5.

It creates a place where “constructive tensions” can help build a path to consensus.
They’re especially useful for prioritizing elements of an overwhelming program, like a website...

<table>
<thead>
<tr>
<th>Element</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>easy to upload photos and videos to events gallery</td>
<td>via local or Outlook, download need pov from agency</td>
</tr>
<tr>
<td>events gallery of photos and videos calendars integrate with personal calendars</td>
<td>editorial</td>
</tr>
<tr>
<td>search events</td>
<td>forward an event to another member, sign-up/register to activities online</td>
</tr>
<tr>
<td>search committee members</td>
<td>contacts must link to directory</td>
</tr>
<tr>
<td>list of committee members</td>
<td>contacts must link to directory</td>
</tr>
<tr>
<td>create committee contact info</td>
<td>more detailed for internal user</td>
</tr>
<tr>
<td>reservation confirmation</td>
<td>automated or manual</td>
</tr>
<tr>
<td>make reservations at restaurant</td>
<td>ease and speed</td>
</tr>
<tr>
<td>mobile app for reservations</td>
<td>have a separate scope</td>
</tr>
<tr>
<td>banquet facilities information</td>
<td>ease and speed</td>
</tr>
<tr>
<td>banquet menu examples</td>
<td>response required</td>
</tr>
<tr>
<td>feedback to f&amp;b staff</td>
<td>response required</td>
</tr>
<tr>
<td>feedback to fleet chairs for comments and feedback</td>
<td>response required</td>
</tr>
<tr>
<td>post fleet events remotely</td>
<td>ease and speed</td>
</tr>
<tr>
<td>identify event conflicts</td>
<td>response required</td>
</tr>
<tr>
<td>view event attendees</td>
<td>for people setting up events</td>
</tr>
<tr>
<td>sign-up/register for events</td>
<td>contacts must link to directory</td>
</tr>
<tr>
<td>view event details</td>
<td>contacts must link to directory (only for internal)</td>
</tr>
<tr>
<td>contacts for fleets</td>
<td>ease and speed</td>
</tr>
<tr>
<td>easy event update by designated fleet staff</td>
<td>editorial, enforcement</td>
</tr>
<tr>
<td>links to external Facebook pages</td>
<td>links need to be reviewed and editorial, enforcement</td>
</tr>
<tr>
<td>weather links</td>
<td></td>
</tr>
</tbody>
</table>
Who can argue with the opinions of fake people we all made up?

Jim
Male, 60, Club Member for 22 Years; Active as a Couple with His Wife
Things that speak to needing to get things done, to achieve tasks

Molly
Female, 34, Associate Member for 4 Years; Legacy History with the Club
Things that allow me to express the passion I have for the water

Scott
Male, 37, Part of the Extended Club Community; Likely Prospect
Things that allow me to enjoy the club’s social community

Doug
Male, 45, No Club Experience; Prospect
Things that give me a clear picture: info, facts, figures, its feel
From confusion and conflict comes clarity and consensus…
Which equals a better, more focused experience for audiences...
6. It helps an organization make better decisions about things that affect its members.
Boards and association leaderships often face big questions…

+ Should the organization focus more on advocacy?
+ Should it own races?
+ Should it develop wellness programs for companies?
+ Should it do more outreach to smaller, local clubs?
+ How should its website be organized?
Personas are like a small, focus group of friends…

Brenda
+ Intense runner, 45
+ A “true believer”

Heidi
+ Competitive runner, 28, a transplant from NYC
+ Very focused on herself

Larry
+ A returning runner, 50
+ Runs for fitness, to maintain his health

Beverly
+ Casual fitness runner, 34
+ Runs for fun, stay fit, to connect with friends
They defined what the brand was to them…

**An Umbrella**

+ CARA name implies a broad domain across runners’ needs
+ General sentiment that people want to feel more included in the organization
+ Too exclusive a focus on marathon training has a limiting effect
+ People highly value the oversight role, especially with racing
+ High acceptance that the scope should include larger health and wellness issues

**An Expert**

+ People know CARA as the gold standard for training
+ Runners have lots of questions — injuries, diet, etc. — and need a knowledgeable resource they can turn to
+ Expectation of knowledge connecting running to the community, to Chicago
+ Speaks to character of authority: helpful, approachable, nurturing
+ Expertise implies being a champion of the pursuit at its highest level

**A Leader**

+ A great deal of equity in non-profit status and unbiased voice
+ Alignment with commercial pursuits undercuts positive halo of neutrality
+ Independence and focus on runners’ needs creates clout with power players
+ Positioned to fill a void: lead an “engaged and influential citizenry” and advocate for the lakefront, youth fitness, safety, etc.
+ Expectation of stability and gravitas; a mature and buttoned up organization

**A Pathway**

+ A training program focus has encouraged seeing engagement as episodic: origin of the “leaky bucket”
+ Financial pressures favor a sustainable engagement model and product set
+ A clue in how longstanding members see value: “it’s a good thing to do” — speaks to a higher order of need
+ Embracing wellness expands relevance to non-event driven audiences
+ Promoting advocacy extends relevance to areas important to broader audiences
This worked so well, it was incorporated into a formal process…

<table>
<thead>
<tr>
<th>Brand Lens</th>
<th>Audience Lens</th>
<th>Business Lens</th>
<th>Resources Lens</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does this idea align with, and support, the vision for the brand?</td>
<td>How does this idea serve the key audiences for the brand?</td>
<td>Does this idea further, enhance, and promote the organization’s business objectives?</td>
<td>Does the organization have the assets necessary to pursue it?</td>
</tr>
<tr>
<td>+ Does it align with the brand truths?</td>
<td>+ Does it keep “the every-runner” in mind? How will it benefit “the every-runner”?</td>
<td>+ The required capabilities?</td>
<td>+ Will it divert resources from other projects?</td>
</tr>
<tr>
<td>+ Does it align with the brand attributes?</td>
<td>+ What would the Personas think of it?</td>
<td>+ Will it limit or prevent action on other ones?</td>
<td></td>
</tr>
<tr>
<td>+ Would it help the brand authentically live the brand manifesto?</td>
<td>+ Does it create new, beneficial audiences for the organization?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Objectives**
Does this idea have clear objectives, clear benefits, and clear ways of measuring success?

**Finances**
Does this idea create financial opportunities for the organization? Create economic strains on the organization?

**Execution**
Does the organization have the necessary skills, processes, tools and people to execute?
+ Will it require new project management resources?
+ Are partner selection processes in place?
+ Are there contingency plans for changing business conditions and new competition?
+ Will it require new communications tools?

**Operations**
Does the organization have the necessary skills processes, tools and people to operate the final program?
+ Are staff available to manage and operate the final program?
+ Are funds available for additional staff?
+ Are training and onboarding processes in place?
Summing Up
Personas can give an organization a new sense of purpose...
“The single tool that does the best job at spreading empathy throughout a business is the Persona.”

Peter Merholz, Harvard Business Review
Above all, though…

It’s not about the document alone, it’s about the process, the collaboration.
Nothing significant happens until a pattern is broken.
Brining Empathy into the equation improves Personas…

+ Create a richer, more accessible picture of audiences
+ Make assumptions about audiences explicit and sharable
+ Expose hidden biases and problematic assumptions
+ Create a greater connection with audiences as individuals
+ Stimulate creatives ideas about being meaningful to audiences
More importantly, Empathy enhances how we work…

+ Promotes better, more balanced, pictures of audiences
+ Taps into latent internal insights, overcomes silos and hierarchies
+ It helps us see the big picture more clearly
+ It makes new audiences more accessible to an organization
+ Creates collaboration, engagement, and energy
+ Provides a framework for making better, truer, decisions
Questions?