

Flat Stanley Doesn't Live Here

A Real and Practical Starter Guide for Buyer Personas



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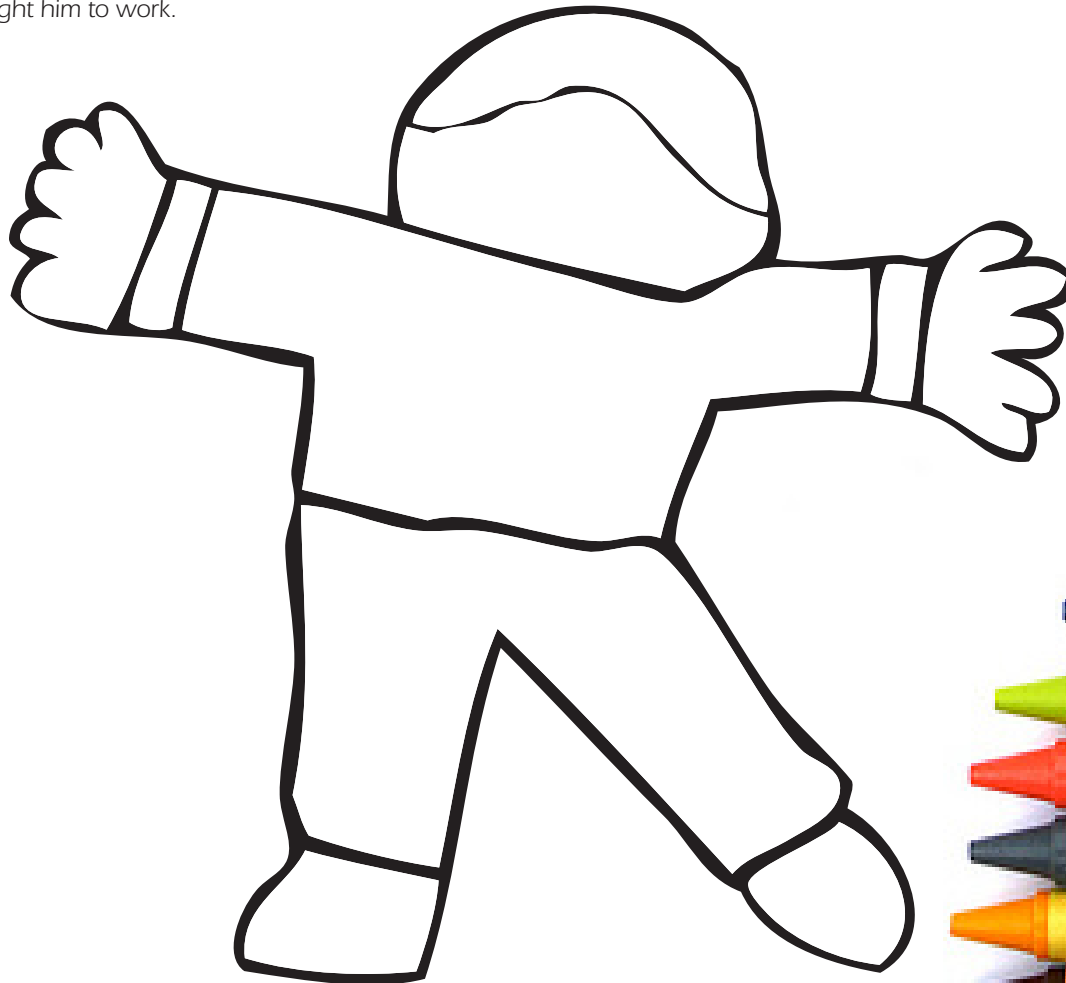
Have you heard about Flat Stanley?

A 1964 children's book written by Jeff Brown, Flat Stanley features the story of Stanley Lambchop who was flattened when the bulletin board over his bed fell on him one night. Since that time, the story has taken on a life of its own. Flat Stanley projects became teaching tools, as students included pictures of Flat Stanley in letter-writing campaigns to see how far he could travel.

In 1994, Dale Hubert, a Grade 3 teacher in London, Ontario, Canada, began the Flat Stanley Project . He invited other teachers to take part by hosting flat visitors and to encourage their students to write their own Flat Stanley journals. Jeff Brown, the author of the Flat Stanley book, was delighted with the Flat Stanley Project as it renewed interest in the book which resulted in a sequel almost 40 years after the original.

As the internet grew and became available to educational institutions, high-tech Flat Stanley started whooshing by at phenomenal speeds as he raced across the corners of the globe. In fact, in 2010, Darren Haas, a huge Flat Stanley advocate and applications architect, approached Dale with the idea of applying Dale's Flat Stanley concept to an app for the iPhone. Since then, Flat Stanley has traveled across the digital universe onto Facebook, Twitter, iPhone, and beyond.

Now that Flat Stanley was zooming around the world for students, it was only a matter of time before businesses learned about the Flat Stanley concept and brought him to work.



It All Started With a Picture

It was the marketing communications team who first introduced us to Flat Stanley in the business world. We needed a picture of our customer, someone who could “make it real” to us. The picture was posted on the company bulletin board. We even had copies of Flat Stanley, who actually were named (Flat) Jane and (Flat) Joe, on the new mouse pads that appeared on our desks magically one night. And, then, when we turned on our computers to go to our company web site, there they were again! Flat Jane and Flat Joe were now in cyberspace, having morphed into our systems and were appearing on our screen right in front of us.

This is cool! This is how we make our customers real, right? All we have to do is capture a pretty picture?

WRONG!

Let me say it again...WRONG!

This is exactly the problem faced by businesses. Marketing communications purchased a stock photo, or hired an actor who stood in front of a photographer, and created a great image that could represent a customer. They paraded the image around the business and everyone was encouraged to think about this picture as the customer. There were even big posters and wall clings made that were mounted around the company – especially in the sales area.

But, it is an image. It is not the customer.

In their defense, the marketing team was quick to point out there was a story with Flat Jane and Flat Joe. Look, over here. You can read all about them.

WRONG again! Let me say it again...WRONG again!

A story is an account of incidents and events. A story may be a retelling of news and broadcasts. This doesn't read like a story. It is a description of Flat Jane and Flat Joe. Finally, a story can be defined as a piece fiction, shorter than a novel. Okay, on this one, you nailed it. The story of Flat Jane and Flat Joe are “stories” by this definition.

But, how does a fictional story help your business? How does fiction impact your product feature choices? How does Flat Jane or Flat Joe's fictional revenue impact your balance sheet? It shouldn't, it can't, and it doesn't. Fiction does not belong in business.

So? Do we throw away Flat Jane and Flat Joe? Send them through the shredder?

Yes and no.

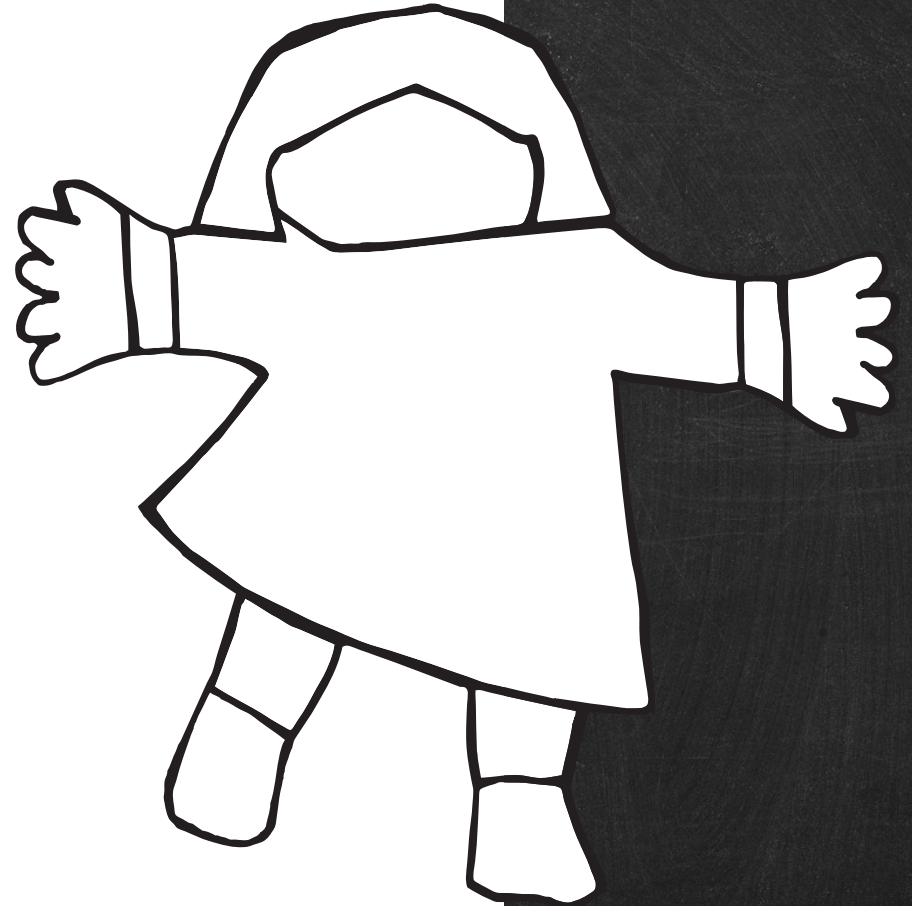
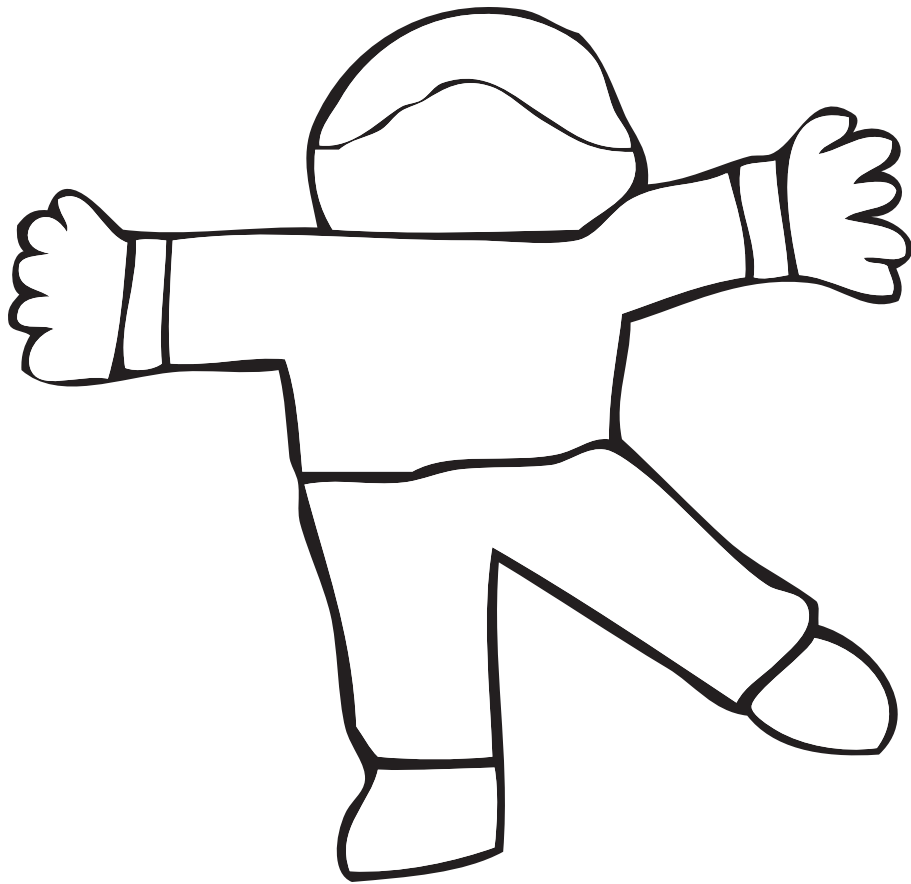
Yes, send the paper images of Flat Jane and Flat Joe through the shredder. Yes, shred the stories as well. But, don't shred your customers! (Besides, the loss in potential sales, it can really hurt and is often very messy.)

**A picture
is worth a
thousand
words.**

– Fred Barnard

Let's start over and build Flat Jane and Flat Joe into real people. People that you know and can "see."
People that are meaningful and have more than two dimensions.

A persona that matters.



What is a Persona?

No doubt if you're reading this, you have heard of the concept of a persona before. Personas are defined as detailed descriptions of imaginary people which were constructed out of highly specified data about real people. Typically the definition of a persona has been associated with a user persona, a potential customer who is ultimately the end user of the product (including services) that you are developing. The concept was introduced to the masses by Alan Cooper in his book on design, "The Inmates are Running the Asylum." Since that time, the persona concept has broken into two focus areas: a persona for the user and a persona for the buyer.

Buyer personas have been the cornerstone of most product marketing education, training and seminars for more than 10 years now. Thousands of product marketers have been introduced to the concept.

Yet, we still have professionals developing Flat Janes and Flat Joes and pasting them to the walls.

Why? Because doing is harder than not doing. This is always the case. It's why we take last year's launch plan and update it with new dates, but not tasks. It is easier to simply not do.

What happens when it fails? Look at the recent debacle with Netflix. Netflix had a loyal, strong and growing customer base. Then, the decision was made to change the pricing. Then it comes out that it was really about changing the business model and Netflix "pre-introduced" their Qwikster product. The backlash was beyond what anyone has seen in the market in years with a poor product. Whether it was the right model or not, the announcement was not managed well. It is a quintessential example of Netflix not knowing their buyers.

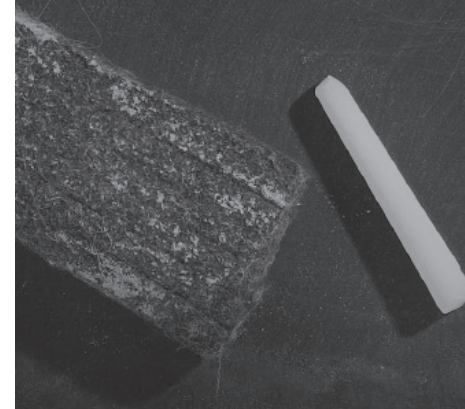
It's the same as when you see a marketing campaign that turns into a train wreck, despite all attempts to stop it from falling over the cliff. When the effort was over, you held a meeting to review what happened, celebrate the highlights where you can find them, and understand the faults. But, what that meeting turned into was two hours of finger-pointing and name-calling (okay, maybe you didn't say the names out loud, but you were thinking of them.)

Maybe the real problem was you didn't understand your market. When you don't understand, you can't speak to them. When you can't speak to your market how they want to be spoken to, in a way they can understand, you simply show what you already knew. You don't know your market. Flat Jane and Flat Joe are not your market.

Buyer Personas are the personification of what you learn by truly and deeply listening to your market. This personification is how you bring dimension to Flat Jane and Flat Joe.

**I still have
imaginary
friends who
I talk to in
my head.**

– Lee Ryan



So, Where do I Begin?

Buyer persona “experts” will say to start by creating a plan of approach: a timeline for how long you will spend developing profiles, which personas you are trying to find, how many interviews you need to conduct, etc.

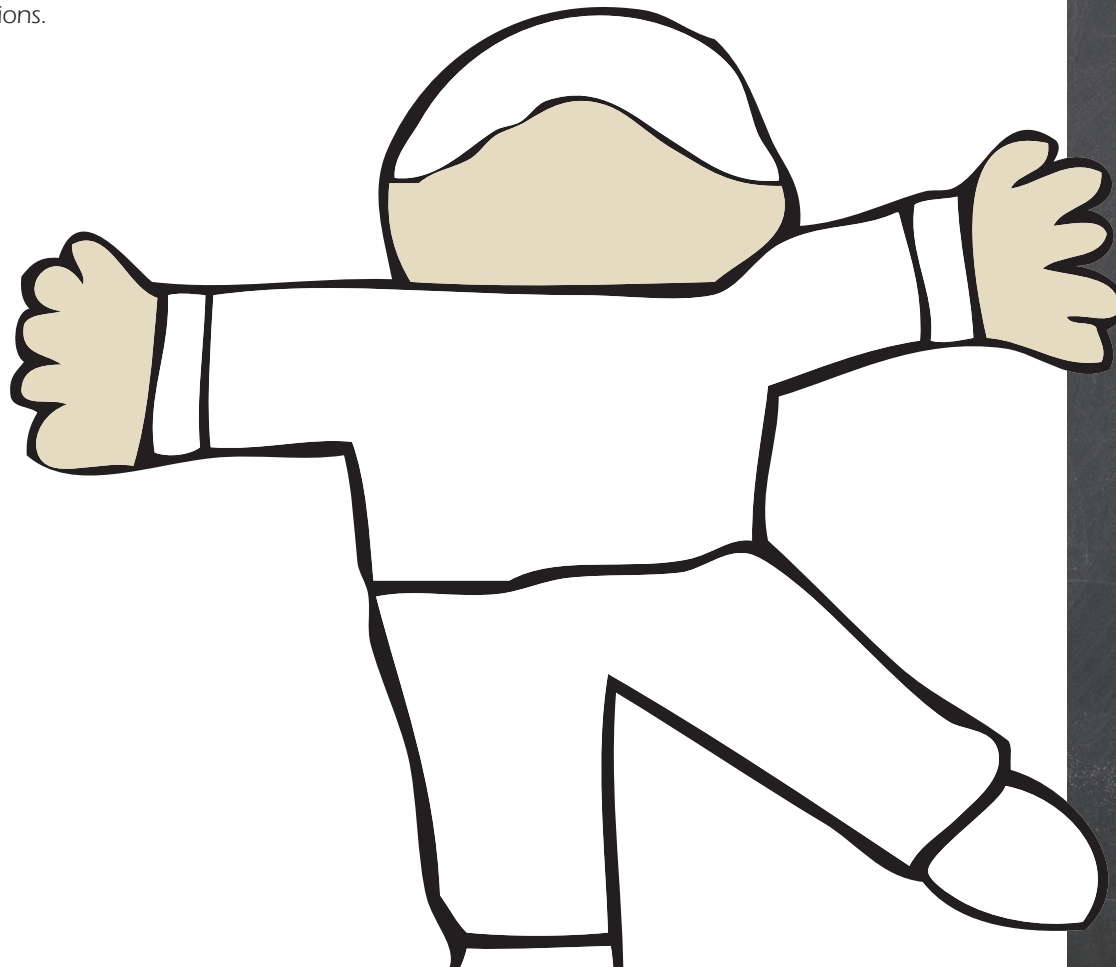
They are instructing you to create a project plan.

But that’s where this guidance differs. Personas are not a project. Let me say that again, Personas are NOT a project. Personas are part of your business so you need to start there. Your first step in the investment of a persona is by making a commitment that you are going to throw away Flat Jane and Flat Joe, and create a real, living, buying persona that will add value to the conversation within your company.

This commitment is one that everyone has to make. Your marketing communication team has to let go of their Flat Joes and Flat Janes and their so-called stories. . Your development teams have to stop pointing to the posters on their meeting room walls. Your sales groups have to stop referencing them in conversations as if they mattered. Your management team has to give its blessing to this new process.

The blessing of management is more than a verbal “ye shall be blessed.” It involves getting a commitment from them to have the resources – time, people and money – to do this right this time around. If they only commit on one of these items, you are handcuffed to breathing life into the paper dolls. You are making an investment in a persona – not creating, not writing, and not developing. It is about investing.

Now you’re ready to have those conversations.



**A journey of
a thousand
miles begins
with a
single step.**

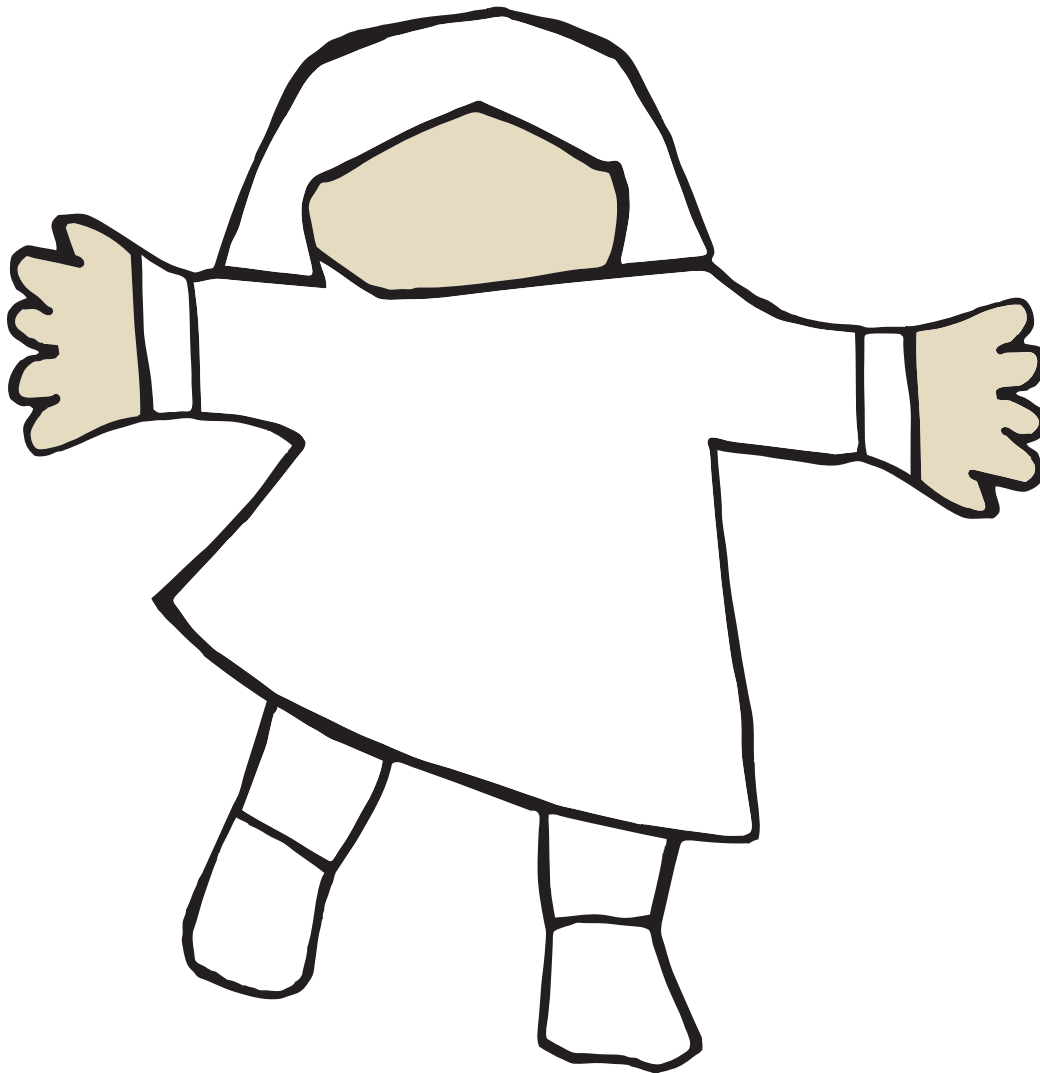
– Confucius

Time to Talk ... Well, Really It's Time to Listen

It isn't about talking at all. It is all about listening. Anyone in your organization who will be listening to the market has to be top-notch professional listeners. They must be able to not only hear the words that are being shared, but, more importantly, to glean the insights and useful information from what is potentially not being shared. Listening is arguably the most important skill for anyone who interacts with the market; when you fail to listen properly, all other dependent moves will miss the mark.

Unfortunately, listening is inherently hard. There's always the next appointment, the urgent e-mail, the distractions from what you're doing right here, right now. When having a conversation with others, you enter into it with a bias, a personal agenda, which interferes with your listening ability. These distractions, even your own, and the prejudice you bring can alter what you hear and how you interpret.

Learning how to listen will help you as you bring Flat Jane and Flat Joe to life.



Nature has given to men one tongue, but two ears, that we may hear from others twice as much as we speak.

– Epictetus

Now Can I Talk?

You're getting closer. Before you can have a conversation with someone, you need to have an idea of what you seek to learn.

Prepare a list of questions that you want to ask someone who may be considering the purchase of your product. Don't worry about applying any filter to them at this point. Don't worry if the questions are not formatted in a grammatically correct manner. Simply list the questions. Let your ideas flow. Ask others what questions they would like to have answered. Have a brainstorming meeting with a few colleagues from all different company departments and ask what they would like to learn from speaking with someone on the "outside."

Yes. Write questions. You are trying to add dimension to Flat Jane and Flat Joe. You need to ask:

- What is your day like?
- For what areas do you have responsibility?
- To whom do you report? Department?
- What drives you crazy about your job?
- What are your key business drivers (metrics)?
- Where are the internal influences?
- Are their external influences that affect your role?
- How does the buying process work within your organization?
- How often do you upgrade your systems?
 - Do you have plans to upgrade equipment? When?
- Do you purchase software/hardware directly, or do you use integrators or other channels?
- What influences your purchase decisions? Discounted pricing? Bundled offerings? Other incentives?
- Where do you turn for information? Friends? Peers? Networks? Online? Print?
- What Web sites do you visit for your job?
- What Web sites do you like?
- What trade publications do you read regularly? Why?
- What trade shows do you know about?
 - Which ones are of interest to you? Why?
 - Which ones do you attend? Why?
- Have you seen any products you really like (complimentary and/or competitive)?
 - Are there any products/features you are considering? Why?
- How often does your software get upgraded?
 - Is the frequency acceptable/adequate?
- What functionality is missing from our software?
 - How important is this to your job?
 - How does this tie back to your business issue?
- If we offered it, would you buy it? As an integrated solution? Modular? Custom?
- How does xxx product make your job easier/better?

**Personally
I'm always
ready to
learn,
although
I do not
always
like being
taught.**

– Winston Churchill

These questions are obviously written for a software company. You will need to tailor the questions to your own products and services. You see from this sample list that it is a jumble of thoughts with no structure. Once you have the questions in a list, start sorting them by categories. Put all the questions about their job and responsibilities in one section, all the questions about how they purchase your product in another area, questions about frustrations in yet another area, and so on. The idea is simple, look for how each section's questions read together. Are the questions redundant? Did you miss any?

Now that your question list has been edited, throw it away.

I said, throw it away. Not really, but this list is solely to be used as a guide, not a script. Do not send anyone out in the field to ask questions of the market if you need to use a script. Good persona development, adding dimension to the flat image of your market, comes from having good conversations not a question and answer session. This list of questions is your guide, the resource you have in your back pocket when you feel the conversation has gone too far off track from the intent, or when it stalls and you need to jump start it again. The best information comes from the unstructured conversation. You came prepared with a list of what you want to learn so it's easy to do a quick reference look up when the conversation starts to ebb and pick the flow right back up.

A good conversation will happen when there is an exchange, not when you simply read and write and occasionally look up from a pad of paper. An effective conversation includes:

- Entering with a clear goal – to learn
- Organizing your ideas and remaining focused
- Redirecting conversations that have gone off-track
- Following the other party's pace
- Building rapport and establishing open communication
- Using humor appropriately (never sarcasm or negative words)
- Choosing the right verbal and nonverbal language to create consistent, coherent and targeted messages

The single most important element to bring to this conversation is the ability to speak in the other's language. In preparing your discussion, take time to understand the key words and phrases in their industry and their role. It has no importance to you that you "teach" them the right way of doing something. This is about them, not you. If they speak in a way that is grammatically incorrect, don't correct them. If they use the wrong term for a technology, ask them what they mean but don't try to educate them. Remember, this conversation is about them not you!

Don't ignore your ability to have an effective business conversation, listening more than you talk. It is not as easy as most people think. It truly is a unique skill, but needed in this role. In preparing to speak to the market, you need to also be able to listen, probe and gain your prospects' trust so that you learn the important information that you seek.

It is okay to stop right here in the process and get help in effective listening and communicating skills if you need it. You'll be thankful you did.



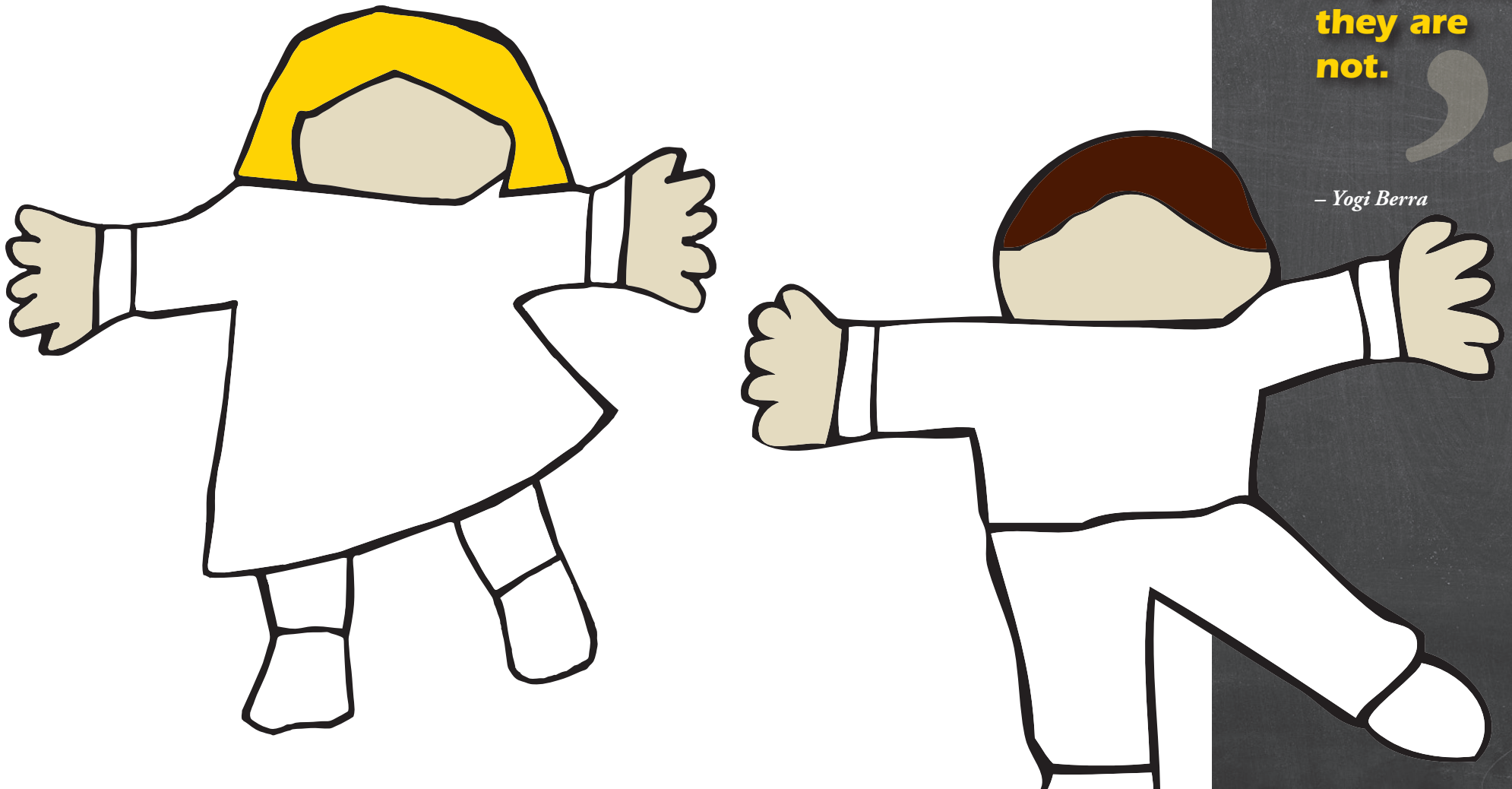
Ok, Now Can I Talk?

Almost but not quite yet. Rushing the persona development will yield the same results as you had before — a flat two-dimensional image with no real story behind it of value. You have to take the practical steps to be ready. And the next step is to practice.

Yes, practice. A baseball player doesn't simply walk up to the plate on their first appearance and start swinging cold. They have practiced during the pre-game warm-ups, and then even took a few swings before that first pitch. That's what we have to do when we want to have a conversation with a potential buyer, too. We need to practice.

Start by having one or two conversations with current customers to get the flow and rhythm down. But, remember, this is practice. At the end of the day, your current customers already spent their money with your company. Yes, there may be value in what you hear, but your goal in these conversations is to practice your listening and comprehension skills.

Knowing that these conversations are "practice" doesn't change what you say or how you say it. It doesn't mean that the information learned is useless and should be thrown away. It simply means that you are using time with your current customers to fine tune the conversations for the ones that you will have with those who don't know your company yet.



**In theory,
theory and
practice are
the same.
In practice,
they are
not.**

– Yogi Berra

Now I Must Be Ready, Right?

Yes. If you have the commitment of the management team and other departments; if you have prepared your guide for use in your conversations; and, if you have practiced on a few current customers, you are ready to go talk with your market.

But, with whom are you going to talk? Did you identify your potential market list to contact for appointments?

First, as stated earlier, practice the conversation with some of your current customers. This will help you become comfortable with the guide you created. It will also help give you a baseline of the attributes that have worked before when a decision resulted in a purchase. But, instead of focusing on the elements of the market segmentation, remember that in developing a buyer persona you are focused on the goals, attitudes and behaviors of the person making or influencing the decision.

The next place to find some names is from the list of those people who contacted your company about the product but didn't choose to make the purchase – the sales loss list. It's easy enough to ask to have a conversation letting the person know you are not in sales and simply want to understand how they made their decision — again looking for goals, attitudes and behaviors. You're using the guide that you created to probe for answers to why they made their decision and what influenced them to do so.

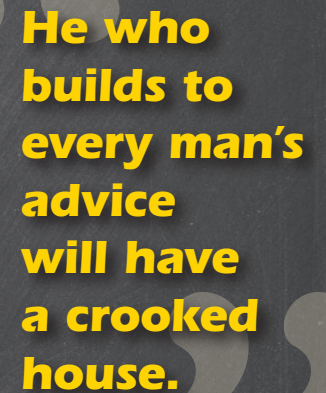
After these first lists, you need to be more creative in finding your sources. But the good news is that you don't have to look far. Start by looking at your network of contacts. If you use LinkedIn to manage business contacts, it is a natural place to cultivate a list (and easy enough to export into an Excel file which you can use as the start of the calling list). You can also use plenty of outside sources such as Spoke or Jigsaw to build your calling list.

Take a look at your personal contact list. Most of your personal contacts have a professional life as well. See if any of these people fall into your market segment. If you can't add some names directly from this list, ask your friends and family for referrals.

Look to see what, if any, trade show or conferences are approaching that are targeting the same market as you do. You don't have to sell a product in the same space; it's about looking at their market segments and seeing if they align to yours. You can hang around the event, not even attending the conference sessions, and find people to have conversations. It takes a little more work and this approach is definitely better suited for more outgoing personalities, but when you find success here you can have three-to-five conversations in one day.

The point is that you have to look to find the people who are the right ones. The list development is harder and more time consuming than the conversation itself. Once you have a list, or at least the start of one, you have to contact the people on it to make an appointment. Most conversations are better held in person, but adding in some phone interviews is acceptable. Neither approach is the "right" one, it is about the balance. And you need to have a good number of potential interviewees on your list. You may have 20 rejections of an appointment for one success. But, spending the time to put together a well-thought out and organized list will make those appointment settings go much faster.

Now you can have the conversation.



**He who
builds to
every man's
advice
will have
a crooked
house.**

– *Danish Proverb*

It's Time to Meet

First, take a good, long, slow breath. Hold it for a second. Let it out. You are not the first person to have this type of conversation. You will not be the last person. Some conversations go better than others. Some interviewers are better than others. Some interviewees are better than others. But at the end of this phase, you will still be standing and have your soul intact. Trust me. You will survive this.

Second, take another good, long, slow breath. Hold it for a second. Let it out. Smile! This is exciting! You are about to meet someone new. You are about to learn something new. You are about to be enlightened. You will have at least one "a-ha" moment that will come from this conversation. This is going to be fun! Treat it this way, and it will happen. Trust me. You will not only survive, but thrive!

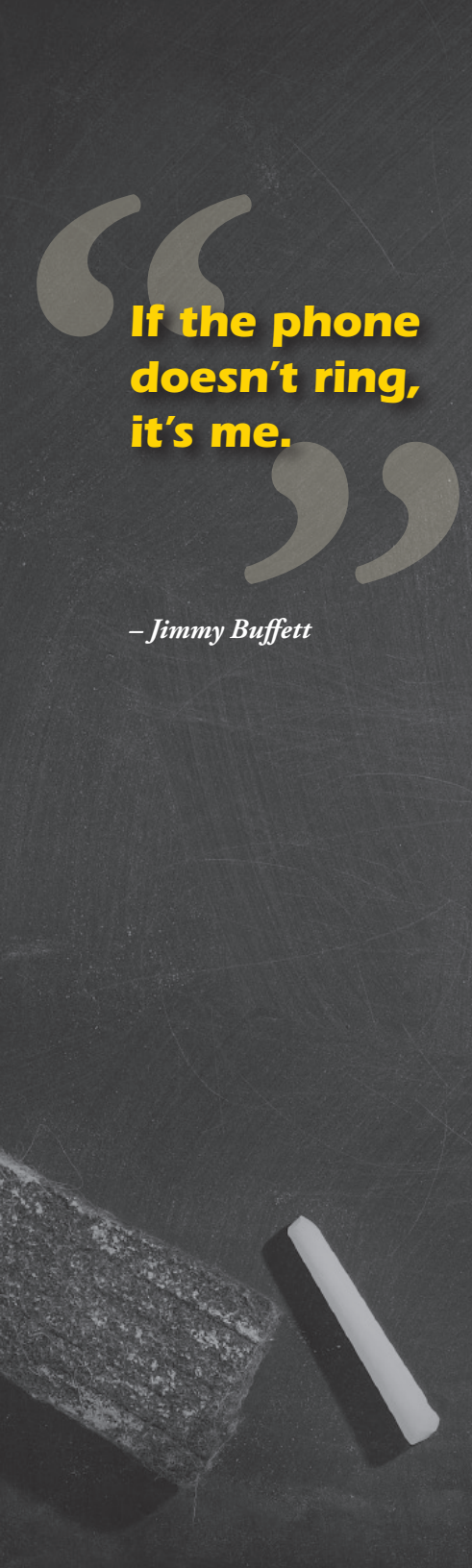
Get ready, here you go!

If you are having a conversation over the phone, you need to take a few moments and prepare first. Make sure you are in a quiet room with no distraction. Make sure that your phone line and headset provides clear communication. Test it on a friend or colleague first. When having the conversation, do not take notes on a computer. The sound of clicking away on a keyboard is very distinct, and it can be heard through the phone line – it is always heard, every time. Take your notes using that old fashioned paper and pen, then plan on typing the notes up after the call.

If you are having the conversation in person, remember this is a business meeting, first and foremost. Having the time over a coffee or a meal is fine, but know that you are going to be taking notes so order something easy to eat – and think of the potential mess. (You can always run through a joint afterwards to pick up a hamburger if you need more food.) Dress appropriately in a style that will mimic the other person. Don't dress to impress. Don't wear flashy and expensive jewelry. Ladies, don't wear perfume. The most successful conversations are the ones where you develop a trust. If you go into this meeting looking stylish and flashy, you may give the truck driver an impression that you think you are more important. Nothing could be further from the truth. You need him to share. This is not about you.

Arrive at your meeting place at least 10 minutes before the other person. Show some respect — this is about them, not you. Traffic is not an excuse; it just shows poor time management on your part. Offer to pay for the other person's drink, meal, etc. (and have enough money available to do so). Make them feel comfortable with a smile on your face. Watch your body language! You need to establish that trust, or they won't share real feelings. Real feelings are what bring dimension to Flat Jane and Flat Joe. And, like the phone conversation, do not take notes from your conversation on a computer or tablet device. Stick to the paper and pen, they are less threatening to the other person. And the old-fashioned way makes much less noise than the click-clacking of the keyboard.

Start the conversation with a nice, simple opening. Explain that you are talking with people in their role to understand what they do, how they do it, and how they feel, in order to bring outside insights into your company. Say "thank you" often in the beginning. Show some appreciation for their time and attention. When you get through the opening, start the conversation with the easy questions from your guide. These are the ones related to their job and responsibilities. Continue your conversation from there, probing for more in-depth answers when you hear something that has you curious.



**If the phone
doesn't ring,
it's me.**

– Jimmy Buffett

When probing for more information, be careful not to lead the interviewee to an answer, thought or conclusion. You want more information, but don't decide for them what "more" means. If the conversation stalls some, a quick glance at your guide should be enough to get it moving again. You will settle into a nice rhythm. Let it flow, and let it go.

How long should a conversation take? It depends. Some can be as little as 15 minutes, some as long as 2 hours. You are not trying to write a novel here! A phone conversation typically takes about 30 minutes. If you are meeting over coffee, plan on an hour; and, if your meeting is over lunch, you should plan for 1-½ hours.

When engaging in a long interview (more than 10 minutes), it is natural to have a desire to use a recording device, audio and/or visual. First, resist that urge! True, it means you might not be able to record something that was discussed, but it creates a more natural environment for having the conversation if you are not looking at a video camera or microphone.

But, if you must record the conversation, you need to have written permission from the participant FIRST. Do not spring this request on the interviewee at the last minute. Be clear when the recording device is on and when it is off. And do not let the recording device dictate the speed of the discussion. If the battery dies, it's a tough break, but you can't stop talking to replace them. If you don't plan ahead, better luck next time. Better yet, plan ahead

How many conversations will you need to have? Again, it depends. You are looking for trends. Trends can appear after three conversations; some trends don't appear until you've had ten. You will most likely be on the higher end of this number if you are having phone conversations, and the lower end for in-person interviews. Like so many other elements in building buyer personas, there is no magic formula – stop looking for one.

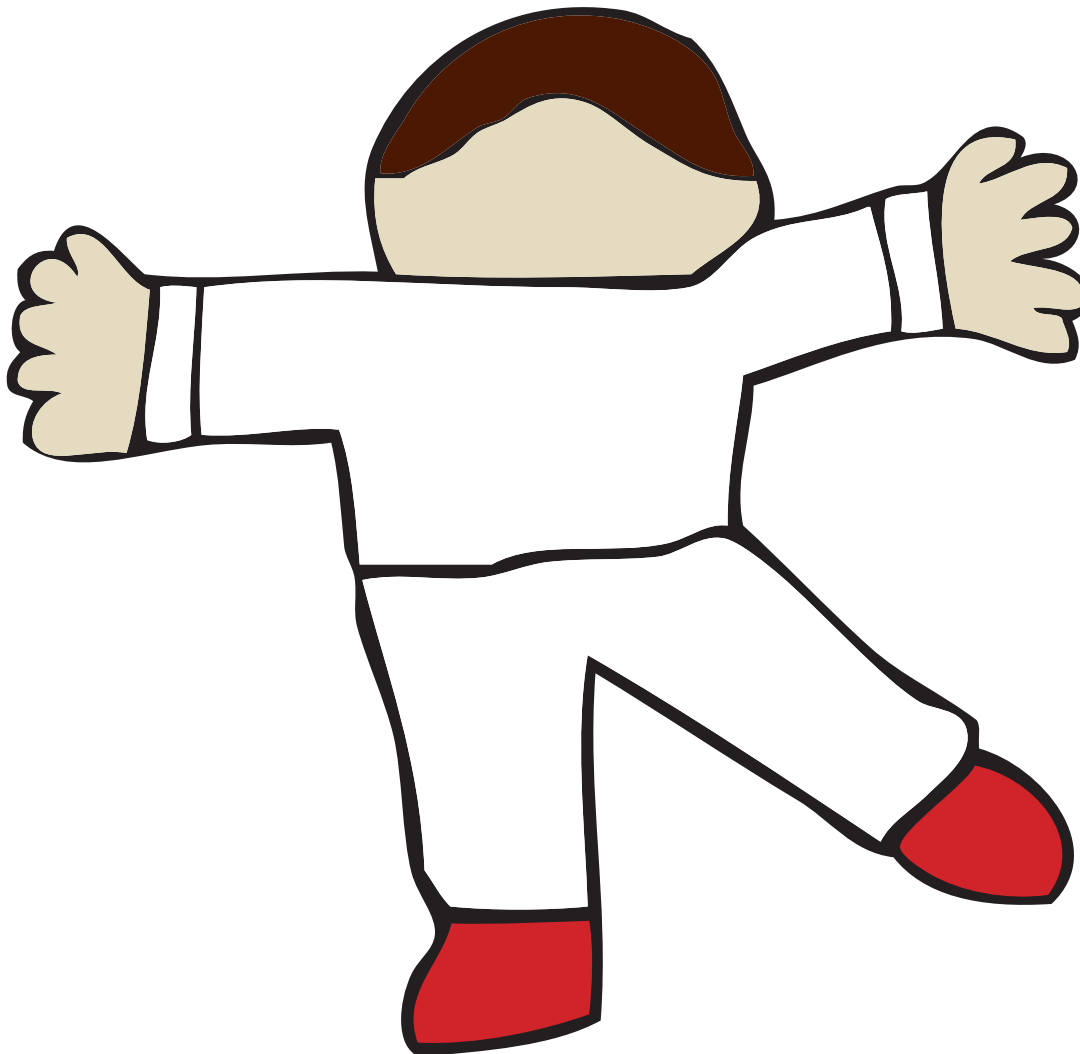


Writing It Down

While you are meeting, you obviously need to be taking notes about what you are hearing. What should you be recording? The answer to this is to write down what is relevant to why you wanted to speak with the person – what are their goals, attitudes and behaviors? Capture the answers as part of your discussion. You may not need to record every thought or word, but you do need to capture the essence of what is being shared.

It is also important to capture relevant actual quotes. Quotes are powerful. They are the buyer's words in their own language, and they will help to shape the story you are creating. Include memorable quotes from others as well. Even if your sales team doesn't remember all the details, they will likely remember one or two quotes about your buyers.

When you leave the meeting, transcribe your notes to your computer. This will make it easier to use when you are developing the persona later. But don't throw out your original notes! These are valuable documents to which you will most likely need to go back and refer to when you are trying to piece together your story. Before you file these away for the future, make sure that you have dated them and recorded the persona type.



I write down everything I want to remember. That way, instead of spending a lot of time trying to remember what it is I wrote down, I spend the time looking for the paper I wrote it down on.

– Beryl Pfizer

Making Sense of it All

Once you see some trends and you stop the interviewing phase, it's time for the fun. It's time to analyze what you have learned.

First, based on the "grouping" of questions you have developed for each persona, pick apart the answers from all the interviews so they individually relate to one question. If you met with 12 people, then you will have 12 answers for each question. Even if you didn't address each question during each conversation, but go through this exercise and compile whatever answers you have for each question. Make sure to note the questions that have few or no answers – this may be an area where you need to speak with several more people to fill in the details. Once you have the first pass of the grouping done, take a minute and do it again. The second pass is to make sure that you didn't miss anything on the first round. If necessary, do it a third time. You are looking to make sure that you have your answers logically organized in a way that clearly relates to topics and questions you set out to discover; and, also to ensure that you have sufficient information.

Now that you've completed the first grouping, look at each area independently. You can combine questions with similar topics (i.e., web usage, social media, product comparisons), but make sure that they logically go together, or keep them separate! Individual topic sections are evaluated for "sameness" responses that illustrate what impacts the goals, attitudes and behaviors of the buyer.

After you have the groupings and the trends identified, and you are familiar with the patterns and trends the answers revealed, it's time to write the persona.

Begin formatting the persona with a description. This should include demographic information such as:

- Age
- Education
- Experience

Continue your writing using the following sections:

- Background – Describe the persona's situation, physically and emotionally.
- Typical Day – What do they do all day? What are they responsible for? How do they interact with co-workers and customers?
- Problems & Frustrations – What challenges disrupt the persona day to day? How do they manage these?
- Motivations – Why do they do what they do? How do they feel a sense of purpose and/or satisfaction?
- Influences – Who do they listen to? For purchasing? For advice? When they need help?
- Goals – What are they trying to accomplish? Why? How?
- Attitudes – How do they feel about their job? Your company and product? The industry?

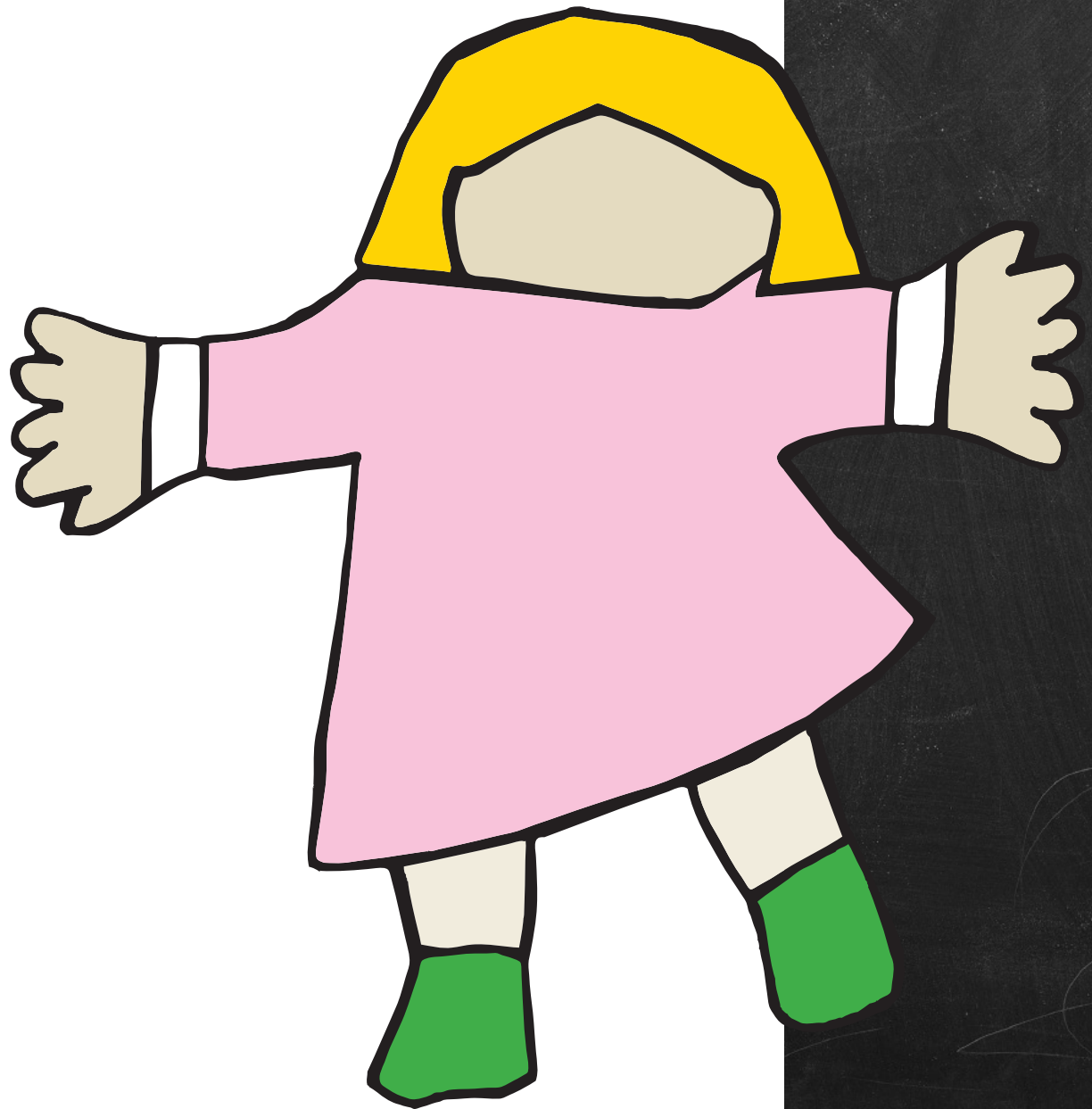
Finally, end the persona with a narrative description, including your recommendations for the best way to reach this persona, to motivate them to take your desired action.

One of these things is not like the other; three of these things are kind of the same.

– *Sesame Street*

In writing the personas, use simple English. Do not try to make this into a thesis! It is meant to tell the persona's story, for a reader to gain an understanding of how Flat Jane and Flat Joe are real and not just flat images on a paper. In making it simple, be sure to include key words, phrases and quotes. You must include the buyer's language in the persona, or you are just as guilty as making the story up as your marketing communication team is in putting up an image with no substance.

There is a simple test to see how effective your developed persona is once you have completed the draft. Take the story to a trusted colleague and ask them to read it, nothing more. After they have read the story you wrote, ask them to describe the individual physically to you. If it matches your description, you did a good job. A well written persona will bring dimension to a flat image. If you can envision a person who "owns" the story you just created, then your persona has such dimension and depth. Good job.



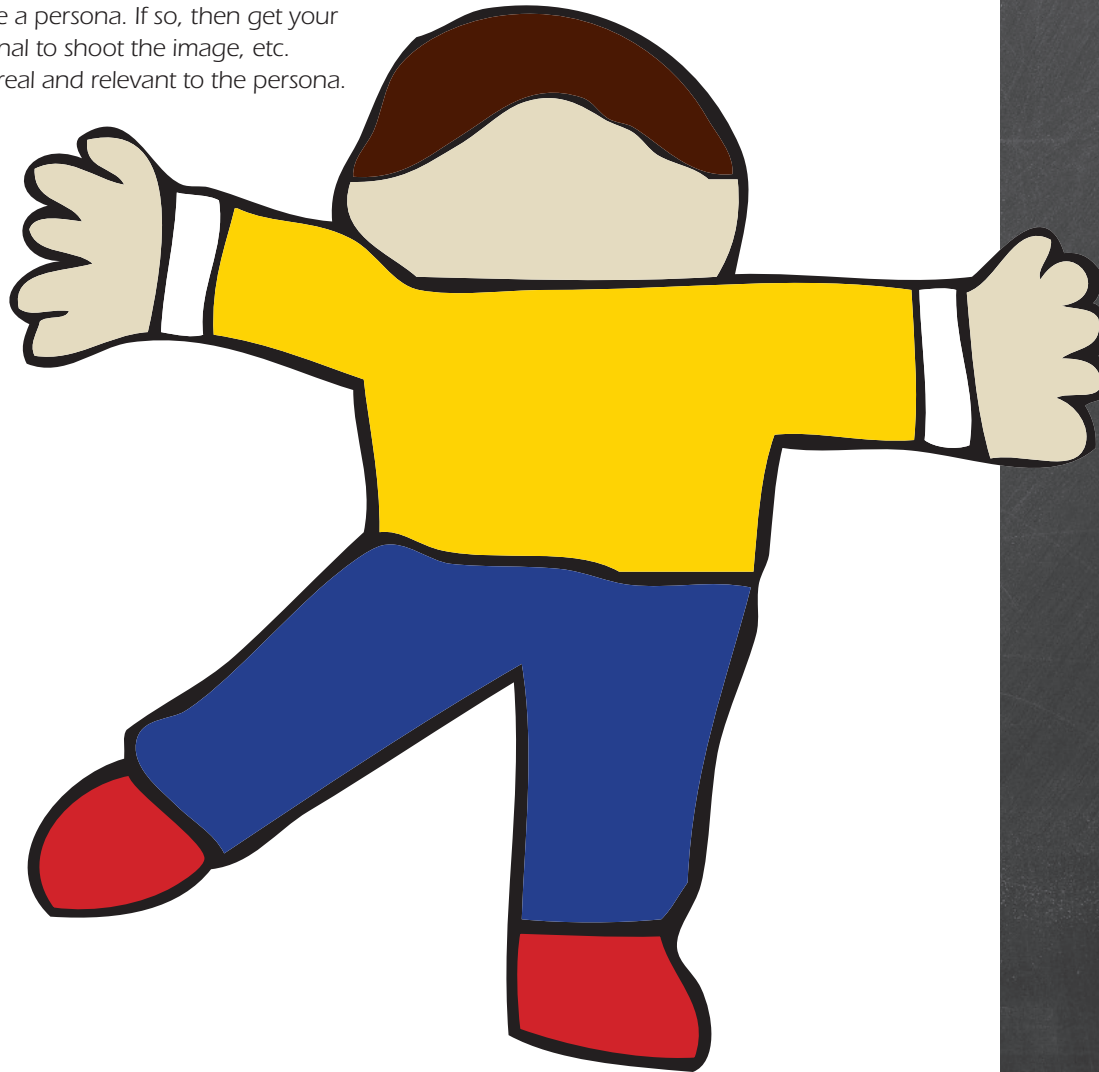
Naming the New Personas

The final step in developing the persona is to name it and give it an image.

In naming the role, make it meaningful and relative. If you are developing a persona for a construction worker, “John Hammersmith” is a bit obvious and will make the whole effort sound a bit cheesy. But if you take the same construction worker, say the job foreman title, and name him “John Forsberg” it works. Why? Well, John is the job foreman, JF – get it? How about the business owner? Bob Oliver would be a good option, or Barbara Olendar. See how BO (business owner) is related? You need the name to be real and related, but not one that will make people groan when they read or hear the persona.

Finally, after the name, you have to give an image to this persona. This is where you can look at your marketing communication team’s catalogue of stock photography. If they don’t have an appropriate image to your persona, look through the multitude of stock photos online. If you do this, please be careful about choosing an image that is not overused. There is nothing worse than introducing your persona one afternoon only to go home and get the direct mail piece from your competitor that features the same image. One option is to look at your own network – inside the company, as well as your friends and family. Is there an individual who is a great representation of this persona? If so, ask if they’d be willing to be a persona. If so, then get your legal team to write up a contract, get a professional to shoot the image, etc. Whatever method you choose, make the image real and relevant to the persona.

The persona story, name and image are now combined into one document. Ta Da!
You have a persona.



There are three things I always forget. Names, faces ... the third I can't remember.

– Italo Svevo

Socializing the Persona within your Organization

If you thought developing a persona is hard, wait until you try introducing the new personas to the organization. Change is always hard, and what you are about to introduce is going to be change – change in how your organization sees, speaks with, and understands your buyer.

Before you introduce the new persona, make sure you have removed all traces of Flat Jane and Flat Joe. Also, go back and insure that your management, which whom you should have been communicating all along, is ready. The management team should be the first to receive the introduction to your new personas since you must have their support before you launch them to your organization.

At the management launch, introduce the persona in a succinct presentation. A one-page “condensed” version of your developed story is more than enough for this audience. You may want to offer the full narration to this group, but only as supplemental reading. Remember, this group of leaders does not need the details of your learnings, only the synopsis – and you need to talk in your audience’s language. In the one page overview, include the image, a brief demographic highlight, the goals, the influences and one or two other “a-has” you’ve learned. More importantly, share with this audience what this persona will mean to your work. What impact will this persona have on your product messaging, marketing campaigns, social media efforts, sales, etc.? Keep to the point and keep it brief! It’s about giving this audience just enough to understand and still support your efforts. It’s better for them to ask for more details and information than for you to do a “dump” of it all so they don’t know what it is important — and what is not.

After introducing the personas to the management team, and re-affirming their commitment, personas should be launched into your organization as you launch a product into the market – with a plan. If your organization has a culture that includes meetings, plan a kick-off event with a few bells and whistles. Perhaps you can invite a few actors to come in and portray the persona in person in a Q&A forum? This would bring the new persona to life for everyone. If this isn’t possible, look at other methods that work in your culture which will highlight the dimensions of the persona, sharing their story and why this matters.

There are two key goals of the persona launch:

1. To introduce the personas in an easy way that personalizes the buyers to the organization
2. To discuss how what you’ve learned from the persona will be changing the current programs in place.

Whatever method works in your company will be dependent on your organization as a whole. But, regardless of the way it is introduced, memory enhancers – wall posters, knick knacks, etc. – should be the last item of concern. Yes, these items are important, but the trinkets alone, with no content or commitment, are not the goal.

Every time I try to initiate change in my company, the organizational antibodies come storming in to attack me.

– A tired executive

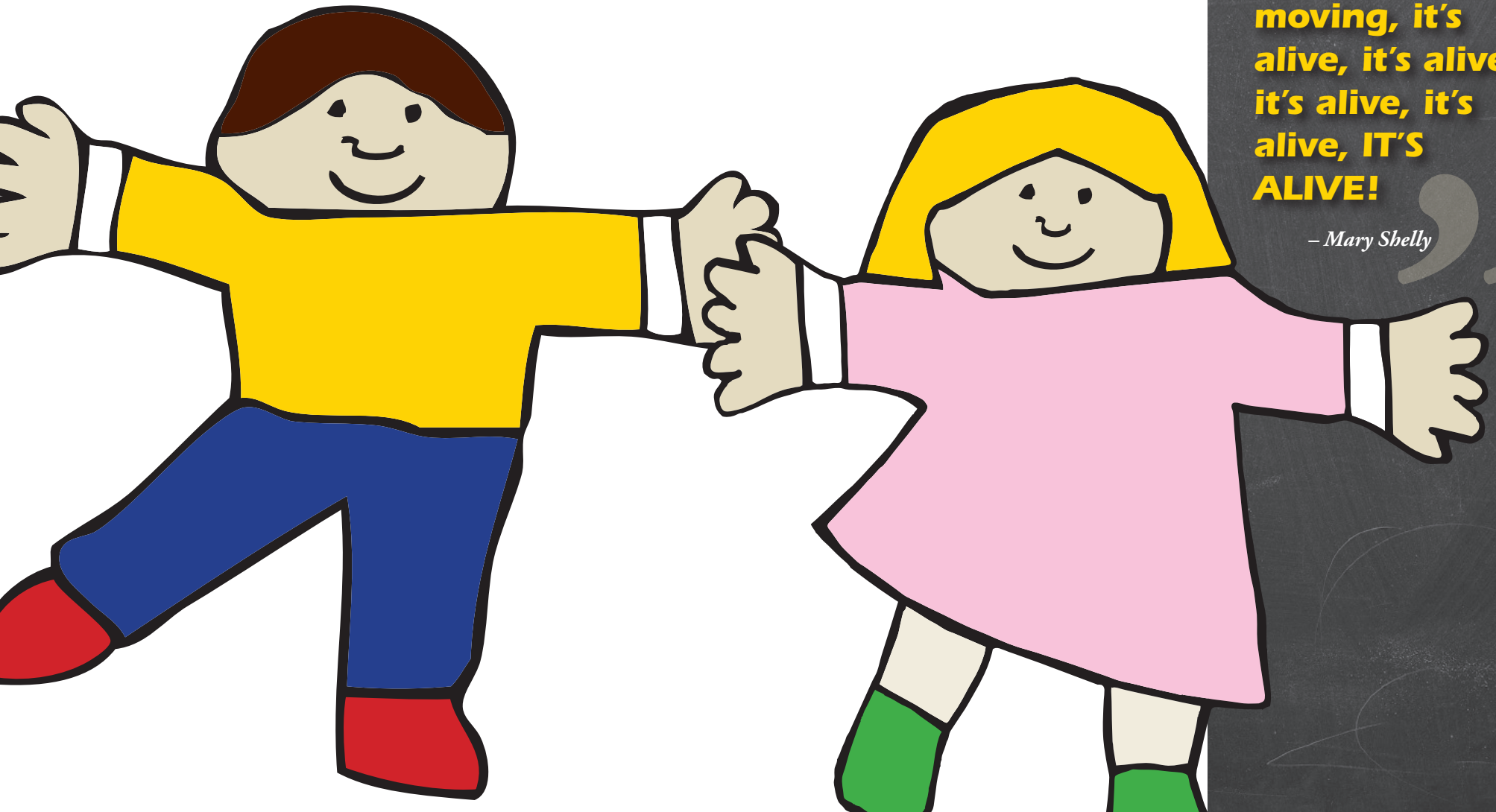
Give Them Life!

Once introduced, and institutionalized within your organization, any personas – even well-developed ones – will die quickly if there is no plan in place to adapt, modify or otherwise evolve the personas over time.

I'm often asked how often personas should be updated. Again, as in other places during this entire process, there is no single right answer, no definitive time period. But if you notice over time that people you had visited now lack the attributes of your defined personas, it's time to do this project again. Personas don't change much over time, but they do change. What was once novel is now commonplace.

The rhythm of how often is dependent upon the rhythm of your market. That timing is different for each company.

Err on the side of consistently having the conversations. Personas are not one-time marketing efforts. A persona is a person, and people breathe and have life. Events happen that change how they think and act. Your persona development efforts need to consider and accommodate for these changes.



Look! It's moving. It's alive. It's alive... It's alive, it's moving, it's alive, it's alive, it's alive, it's alive, IT'S ALIVE!

– Mary Shelly

This seems easy. I can do it myself.

It's easy to develop personas... when you have time. It may best for you to do it yourself.

Before you begin your effort, consider these three items first:

- 1) Do you have time to do it right? You are already so busy and there are no short cuts to persona development. We are all so consumed with daily responsibilities, can you make the time commitment to do it right? Assume that it takes 12-15 conversations (on the far end) to develop a persona, and that doesn't include the list development of who to approach, the time on the guide development, the testing, or the analysis and write-up. This is a time consuming effort. It's worth it, but you can't do this if you only have an hour a week to devote to the project.
- 2) Gathering the data takes skill. It is a straightforward process to ask your list of questions, but it is significantly more difficult to guide a conversation, probe further, and actually listen to your buyers.
- 3) Using an outside service eliminates any preconceived bias – “we know who our personas are” and “our sales teams know it all.” There is an element of credibility that comes with bringing in an outsider to help these efforts.

If you have the time, and the ability, go forth and create. For the majority, it is best to use an outside service to “jump-start the effort” after which you take on the maintenance. It helps in bringing credibility to the reason why you are making the investment in the first place. In the end, however, you must know and embrace your personas. The commitment to develop their personas is yours to gain. The introduction is yours to own. The maintenance is a rhythm your market controls. Getting help is fine, even recommended if you haven't done this before, but don't let the persona go on life support when the consultant walks away!

The final answer to whether you should use outside help is that it depends on the organization's culture and commitment. Many organizations are successful at developing their own personas, typically shared amongst several people doing the data gathering; others need that outside help to get things moving. Your culture will dictate the timeliest and most cost-effective approach for you to follow.

“
**Everyone
gets so
much
information
all day long
that they
lose their
common
sense.**”

– Gertrude Stein

Things to Remember

If you only remember these points, you will have a better understanding of persona development

- Throw away old copies of personas before you start! Start fresh and clean!
- Get commitments from your colleagues – from management down to the rep on the phone. If you try to do this alone, you will fail.
- Prepare your interview questions in advance, but don't read from them! They are a guide, not a script!
- Practice your conversation before you have one that matters. You need to find your own style and cadence in a flow that is natural, using your guide. If you go out cold, it will seem forced and mechanical. The more comfortable you are, the easier your conversation will go. You need to develop trust in order to yield better quality answers.
- Listen more than you speak – remember, there's a reason that you have two ears and one mouth!
- Stop interviewing when you see enough to substantiate the trends you have uncovered. Nothing is worse than talking to more people than you must.
- Take time to analyze and write the personas so they tell a real story. Use plain English, in a style that is easy to read.
- There are no magic bullets, no shortcuts to creating, conversing or analyzing – don't look for them. You will waste time.
- It is okay — and recommended — to get help to get started, but you also need to develop a level of comfort with your market in order to have these conversations and keep the personas alive long after the consultant is gone.
- Do not have one conversation or write one persona if you are not committed to maintaining them on a regular basis! Personas are representations of living people – don't have them die on a wall every six months.

Persona development is fun!
Persona development is powerful!
Personas remind us that we are not the customer.
It is all about engaging with your market.
Enjoy and go forth!



About Jennifer Doctor

Jennifer is the managing partner of HarborLight Partners, a product consulting firm focused on helping companies identify, develop, launch and bring their products to market. HarborLight helps companies better understand their market and organization so they can “unstick” their product and gain momentum unleashing the product’s potential.

In this role, Jennifer brings a unique blend of product management, product marketing, marketing, and IT knowledge to her work, allowing her to effectively speak to all roles and teams involved throughout the product lifecycle.

Her passion is helping the role of the product marketer to share the value of product marketing and earn respect and trust within organizations.

Jennifer has more than 15 years of experience in product marketing and product management, working with companies to help them bring products to life. Her experience includes “time in the trenches”, and she has done it all, from market segmentation and persona development, to gathering requirements, developing use cases, prioritization of features, and writing the stories and requirements,

as well as messaging, launching and presenting to markets and buyers, writing and designing marketing collateral, and working with sales teams to enable them to deliver results.

Persona development is her guilty pleasure. She loves watching the market come to life!



To learn more about Jennifer, or how HarborLight Partners can help you bring light to your products, please visit:

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