

Template: XM Persona Documents

Original Report: *Five Phases For Creating Powerful Personas*

SUMMARY

A persona refers to a *vivid description of a prototypical person within a specific segment*. Personas are an indispensable resource for any Experience Management (XM) effort as they help organizations gain a deep understanding of the people within their target audience(s), which allows them to tailor experiences to address the specific needs and goals of these important groups. Use this worksheet and the accompanying editable PowerPoint to document and communicate the key characteristics of your personas. We've included a persona template along with examples of how you could fill it out for customer, B2B, and employee personas.

INSTRUCTIONS FOR CREATING A PERSONA DOCUMENT

Well-crafted persona documents bring your personas to life by highlighting their relevant attributes in a compelling, easily consumed format. These documents create a cross-functional conception of the individuals who make up a particular segment and they enable people across the organization to design and improve experiences in a way that addresses these individuals' true needs, preferences, challenges, expectations, and goals. Here are the five steps you follow to fill out the persona document template provided (find additional details for each element on page 2):

- 1. Gather insights about the persona.** Compile all the relevant research findings, data points, interview notes, archetypal descriptions, etc. that support the persona you're working on. This information may live in a single, comprehensive reference document or may be scattered throughout the organization. Make sure the information includes the persona's name, photo, and segment title – which you can add into their designated spots in the template on page 4 – along with enough details to extract demographic information, a persona story, and key characteristics.
- 2. Select relevant demographic information.** Using the insights you've gathered, identify the demographic information that will be most relevant for making the persona come to life for the people who will be using it. The information you select should not match any single individual but should instead realistically reflect the broader trends within the group. Add your chosen demographic attributes where it says << DEMO >> at the top of the template.
- 3. Write the persona story and indicative quote.** Next, compose a rich, short description of who this persona is, written in first person and relevant to the purpose of the application document. Once you've completed the story, create an indicative quote that encapsulates the persona's story in a single sentence. To help you develop this narrative, fill out the worksheet on page 3. Then add these elements into their dedicated spots in the template.
- 4. Identify key characteristics.** Finish the template by selecting five to seven key attributes that shape how people think and feel as they engage with your organization. These attributes should be identical across your persona set, but each persona should score differently across them. Add these traits into the given spots at the bottom of the document, and then move the diamond markers to show where the persona falls along the spectrum for each characteristic.
- 5. Use persona document to design and deliver better experiences.** After you have developed a robust collection of persona documents, you should then use them to shape your XM efforts. While personas are often built to support a particular project, once you've created them, you can integrate them into other relevant business processes – such as journey mapping efforts, UX design, product/service design, and marketing strategy – to better understand and cater to the needs of individuals within your target audiences. You can also use these persona documents to build cross-functional alignment and empathy by discussing them during meetings, incorporating them into strategy decisions, integrating them into new hire onboarding, and using them to shape survey deployment strategy.

HOW TO USE

You can use this persona document template in a number of ways to design and improve people's experiences:

- + **Incorporate into design decisions.** Keep the needs of your target audience front and center during the design process by approaching every decision through the lens of, "What would Donna (e.g.) want?"
- + **Generate group alignment.** Use the worksheet on page 3 in a group exercise where each person is asked to fill out the sheet based on what they know about the target audience. Then exchange sheets and discuss any differences.
- + **Build organizational empathy.** Facilitate discussions in your organization on the topic, "How can we better serve "Donna?" For inspiration and ideas on how to use the persona to improve experiences across the business, read the original report, *Five Phases for Creating Powerful Personas*.

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Personas are often captured in a one-page document that showcases the attributes of that group that are most relevant to a specific design project. While personas can contain a variety of information depending on the needs and goals of the project, here are some elements that we commonly find in well-crafted personas and we have included in our template on page 4:

ELEMENT	DESCRIPTION
Segment Title	This element is a short, descriptive title that identifies which segment this persona represents. This title will help people connect the persona to the more traditional customer or employee segments they may be more used to hearing about from a business or strategy perspective.
Name	Each persona should have a first and last name that is appropriate given their demographic information and sound like a real person rather than a cartoon. These names should not support any existing biases or stereotypes.
Demographic Information	A limited set of relevant demographic information will help paint a more vivid picture of who this person is and what expectations they are likely to bring into interactions. This information should reflect the broader trends of people within this group but should not perfectly match any single individual.
Persona Story	A persona document should contain a rich description of who this archetypal person is, written from their perspective. The goal of this section is to tell a story that is both relevant to the specific purpose of the persona and realistic enough for people to understand and empathize with. For help developing this narrative, fill out the worksheet on page 3.
Indicative Quote	Using the persona story for inspiration, create an indicative quote that neatly encapsulates what the character is all about in a single sentence. This quote should be written from the perspective of the persona and should sound like something a person who matches the persona's description would say.
Key Characteristics	These are the five to seven meaningful traits that distinguish individuals in a given group from individuals in other segments. So, for example, don't choose concern over salary or price as a key characteristic if all groups care a lot about it. These traits should not only reflect the defining characteristics of members of this group that shape their behaviors and perceptions as they engage with the organization, they should also link the personas to the objectives of the design project.
Photo	A photo gives your persona a distinct visual identity and makes it come alive in people's minds. The photo you include should be polished and professional looking and should match the demographic information provided. A free stock photo is fine as long as it is high-quality and not overly staged.

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Translating data and insights into a compelling persona story can be difficult. One exercise you can do to help you think through who this persona is and how he/she is likely to engage with your organization is – either independently or with your team – fill out the following worksheet:

Persona Name:

Persona Segment:

1. How does this persona view his/her relationship with your company?

2. What might the persona turn to (outside of your company) for support or information about your organization?

3. How well does the persona understand your organization's domain (e.g. industry, business area)?

4. How well does the persona understand your organization's operational procedures?

5. Why is this experience or journey important to the persona, if at all?

6. How might the persona define this experience or journey in his/her words?

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XM PERSONA DOCUMENT TEMPLATE

<<DEMO>> <<DEMO>> <<DEMO>> <<DEMO>> <<DEMO>> <<DEMO>> <<DEMO>>

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<< Insert Picture >>	<h3 style="color: blue;">About << First Name >></h3> <p><< Persona story >></p>
<< PERSONA NAME >>	
<< Indicative quote >>	
<< SEGMENT NAME >>	

Key Characteristics:

Low

Medium

High

<< Characteristic >>			
<< Characteristic >>			
<< Characteristic >>			
<< Characteristic >>			
<< Characteristic >>			

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EXAMPLE: B2C CUSTOMER PERSONA DOCUMENT

Here is an example of how a customer experience (CX) team who is redesigning the journey of booking plane tickets for an online travel agency may fill in the template to document their persona called “**Donna Redding**” – a suburban mom who is booking vacation for her family.

NAME	GENDER	AGE	FAMILY INCOME	EDUCATION	LOCATION	FAMILY
Donna Redding	Female	45	\$95,000	B.S. from UCLA	Palos Verdes Estates, CA	Married with 3 kids



**DONNA
REDDING**

“I keep our family up and running.”

SUBURBAN MOM

About Donna

I’m a 45-year-old mom who runs my household. My husband and I have three kids between the ages of eight and twelve who require just about all of my time. My husband is a lawyer who works a lot of long hours, so I end up doing most of the family planning. I try to keep track of everything that’s going on so that our family runs smoothly. My eldest son calls me the “CFO” of the family because I keep track of all our finances. We don’t go on vacation very often, so when I do, I want to make sure we get the most out of our trip together.

Travel Characteristics:

Low

Medium

High

Frequency of booking travel



Comfort using online travel sites



Importance of convenience when booking travel



Importance of price when booking travel



Typical level of flexibility when booking travel



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EXAMPLE: B2B CUSTOMER PERSONA DOCUMENT

Here is an example of how a B2B customer experience (CX) team who is redesigning the delivery and integration journey may fill in the template to document their persona called “**David Strand**” – an Enterprise Chief Information Officer (CIO) at large manufacturing company.

NAME	TITLE	YEARS AT CO.	ROLE	VERTICAL	SIZE OF BIZ.	REGION
David Strand	CIO	20	IT Decision-Maker	Manufacturing	1000+ Employees	North America



About David

I’m the CIO of large manufacturing company. We have three manufacturing plants in Asia, and regional warehouses located around the world. I need to ensure that our systems that track and account for our products are accurate and stay online. We are always looking for ways to use technology to improve our business, but we can’t risk a disruption to our ongoing operations.

DAVID STRAND

“Whenever we use unreliable vendors, it backfires – no matter what they offer.”

ENTERPRISE CIO

Buying Characteristics: Low Medium High

Vendor stability and reliability			◆
Integration with existing architecture			◆
Low initial price		◆	
Features and functions		◆	
Sustainable support plan			◆

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EXAMPLE: EMPLOYEE PERSONA DOCUMENT

Here is an example of how a Human Resources (HR) team who is redesigning the performance review process may fill in the template to document their persona called “**George Weathers**” – a young, high potential employee who cares a lot about work-life balance.

NAME	GENDER	AGE	ROLE	EDUCATION	LOCATION	FAMILY
George Weathers	Male	25	Systems Analyst	BA from a top university	Chicago	Single



GEORGE WEATHERS

“I want to succeed,
but work is not my life.”

**YOUNG, HIGH
POTENTIAL**

About George

I’m a 25-year-old who has my life in front of me. I want to be successful, but there are other parts of my life that are really important to me. Many of my friends have gone into investment banking or consulting, and we never see them. That’s not for me. I play in a basketball league and have a regular game night with my friends, and I don’t want to give those up. I’m willing to work very hard, and even put in some long hours that occasionally include some weekend time, but don’t want that to get out of control. I want to feel like I’m part of a team that’s on a mission.

Work Characteristics:

Low

Medium

High

Knowledge of general HR guidelines



Knowledge of financial topics like 401K



Comfort using HR self-service



Desire for team building activities



Importance of career development

