Developing Personas
Using Fiction to Reveal Reality

IQI Leadership Conference

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Developing Personas

Purpose

• Show how to develop customer personas and persona maps.

• Show how to use customer personas to
  – Understand customer segments and their differences
  – Understand customer wants and needs
  – Understand why those wants and needs are important to customers
  – Focus the development of the product or service on one customer persona.
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Outline

• What is a customer persona?
• Gathering customer insight
• Developing customer segments
• Exercise
• Examples
• Using the persona map to focus development
• Customer personas and the Voice of the Customer, Six Sigma and Lean
• Summary
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What is a customer persona?

- Hypothetical, archetype or description of user or customer
- Fictitious but accurate
- Includes name and photograph (e.g. stock image)
- Includes personal goals or aspirations, age, location, family and professional relationships
- Tells their story in one or two sentences
- Describes
  - what they know and don’t know
  - what they can and can’t do relative to the product or service

Tool used as part of Menlo Innovation’s High Tech Anthropology practice ([www.menloinnovations.com](http://www.menloinnovations.com)), from Alan Cooper’s *The Inmates Are Running the Asylum*, Chapter 9
What is a persona?

- Helen doesn’t exist
- People like Helen do exist
- Her story
- Her goals
- What she knows
- What she needs to know and why

Helen McNeal

Helen is the lead ICU nurse currently working the afternoon shift at St. Patrick Hospital in greater metropolitan Chicago area. She has been at St. Pat’s for nearly 15 years and has been working in ICU for the last 6. Two years ago St. Pat’s began looking into the application of lean. Helen’s boss has recently been part of a 6-month effort to identify and prioritize the hospital’s value streams and Helen expects to be part of several Kaizen Events within the next several months. To that end, Helen has been reading about lean, and having already been a member of the ASQ Healthcare Division and a regular at the Chicago Section meetings, she has been asking her ASQ colleagues about where she can learn more about it.

Helen and her husband have two children who are both at University of Illinois and with both of their jobs and Helen’s overtime and shift premium, they have been able to maintain their lifestyle in the suburbs even though the cost of living, taxes, etc. have been skyrocketing over the last several years. Helen and her husband are looking forward to retiring and moving to the sunny south within the next 10-15 years.

Goals:

- Get ahead of the “curve” on lean so she can maintain her position as a key leader on the floor at St. Pat’s.
- Begin to build her expertise as an internal consultant in lean so when she retires, she can use it as a way to supplement her retirement income and keep active in the nursing profession.
- Be able to spend more time with her family – although the over-time money is good, it is adding stress to her family life.
- Get some things done around the house “before she dies” (redecorating, getting ride of accumulated “stuff,” organize photographs in albums, prepare for grandchildren).
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Gathering customer insight

- Surveys
- Interviews
- Focus groups
- Observations
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Developing customer segments

- Different products/services serve different segments
- Segments use products/services differently
- Pricing differences
- Distribution differences
- Develop at least 3 personas for each segment
- Persona Matrix to enumerate combinations of factors
Developing Personas

Developing customer segments

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Exercise

For a process particular product or service in which you are involved:

1. Briefly list at least three customer segments which use this product or service
2. Based on what you know about each segment, imagine someone using your product or service.
3. Write down in a paragraph what they are doing – how are they using your product or service.
4. Ask yourself why they are using your product or service in the way that they are? Write down what you think might be the answer.
5. As they are using your product or service, what difficulties do they have and why? What do they know and what don’t they know and why?
6. What is their age, marital status/ family, where do they live, professional relationships – write these down.
7. Write down what you think are their personal goals or aspirations.
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ASQ – LED Example 2

Ram Srinivas

Ram is an industrial engineer who got his experience (10 years) working for a Tier 1 automotive supplier in southeast Michigan. Ram move to the Chicago area with his wife and three children when he found work at St. Patrick hospital two years ago after being out of work for nearly a year. St. Pat’s has started on their lean journey with an outside consulting firm but quickly learned that they needed to invest in full-time staff with someone who had experience in implementing lean. Ram answered their ad and has been very busy working with the hospital execs as well as line management in getting lean going. Right how they have a few “pockets” of lean activity but over the last 6 months they have made the decision to make lean a strategic imperative.

To that end, Ram is feeling a bit overwhelmed. He feels he needs some training in how to implement lean strategically since most of his experience has been very tactical. Also, Ram, although he is learning the culture and language of healthcare, it still is a very different environment that that of automotive manufacturing. Ram is a member of SME and is familiar with the lean certification program, though he has never bothered to undertake it. Now he is thinking he should – particularly the silver level since he needs to help his whole organization.

Goals:
- Continue to figure out how to apply lean in healthcare
- Ensure his value to the hospital through being a lean practitioner – right now he still feels like an outsider to healthcare
- Provide for his family – he does not ever want to go without working again.
- Gain the lean silver certification

• Compare Ram with Helen?
• How are his needs different?
• Why?
Dr. Eli Jones, M.D.

Although Dr. Jones is a thoracic surgeon by training, he has been the Chief Operating Officer of St. Patrick Hospital in the Chicago area since he came here three years ago from the University of Pittsburgh where he was first exposed to the concepts of quality and the Toyota Production System. It was his idea to introduce lean, slowly at first, at St. Pat’s in order to pull it out of the financial quagmire that it was in when he arrived. He saw evidence of waste everywhere. The challenge has been to work with his leadership team so that they could see the opportunities in the same way he did. Dr. Jones is beginning to see that lean is getting some traction, finally. He has brought on full-time staff with experience in implementing lean and is helping them learn the ways and the culture of healthcare – hopefully while not “going native” so that they can help introduce innovative ways of streamlining flow and eliminating non-value-adding activity.

Dr. Jones admits to being a “work-a-holic” and needs to spend more time with his wife and their 1-year old son. This is his second marriage and he knows that his first one failed because of his career. Dr. Jones is passionate about lean and implementing quality methods throughout healthcare and freely preaches about it whenever he has the opportunity.

Goals:
- Figure out a way to get the whole hospital to embrace lean everyday
- Take at least 25% out of the hospital’s cost structure without laying off doctors and nurses.
- Increase patient throughput in all service areas by at least 25%
- Eliminate medical errors
- Spend every evening and weekend at home with his family
- Be seen as a national leader in healthcare

• Compare Dr. Jones with Ram and Helen?
• How are his needs different?
• Why?
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The Persona Map

For a given product or service

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The Persona Map construction and interpretation

- Team – product or service development
- Generate personas – lots of them for each segment – at least 30 total
- Use Affinity Diagram approach – lay on table and collectively move the most important to the center
- Who will gain the most value from it
- Ask who would miss this product or service most if it was not available
- Consense on only one
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Non-Profit Example – Church Plant

Nate Kellser

Nate is 28 years old and working for a local cement company. With the economy slowing down so much, Nate is not getting as much work as he would like or the family needs. At times, Nate needs to travel long distances as his company tries to find work across the state. Nate has been married to Tina for 3 years. Tina used to work in the video store in town and was attending the community college until they had children; Luke (2.5 years) and Alex (.5 years). They rent a small two bedroom house near Hamburg.

Nate completed high school but was a poor student and a good athlete. He enjoys working outdoors with his hands. He met Tina after a coed softball game. They married after a short time and their children were not planned. The children have put a stress on their time together and their plans to improve their financial situation. Family is around to help but cannot replace the lost income or time it takes for Tina to attend school. Nate misses his time with his high school buddies and still likes to play sports with them when he can.

Nate attended church and Sunday School with his grandparents when he was a boy but stopped going as he neared middle school. He hasn’t thought about church since.

Nate’s Goals:
1. Looking for a mentor
2. Financial guidance
3. Better job prospect

• Does Nate exist?
• What’s his story?
• His goals?
• What does Nate needs and why?
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Personas in Voice of the Customer

- Voice of the Customer (VoC) is the system by which the organization measures and understands the needs and expectations of their customers.
- Personas can drive data collection by posing questions about why the customer needs exist.
- Can help uncover needs which the customer does not or cannot articulate.
- Helps summarize VoC and translate into focused actions.
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Summary

Customer Personas

• Provide a powerful way to enhance the Voice of the Customer for design of products and services using Six Sigma and Lean.

• Provide your product and service developers with a way to put a name, a face and a compelling story around the typical lists of prioritized customer requirements and statistics – to identify emotionally and not just rationally with customers.

• Provide ways to personalize how your efforts will impact the experiences of your customers.

• Helps create alignment so everyone throughout the development process has the same customer focus.
Thank you

Questions?