

Guidelines for Creating & Using Personas



Engagement

Secure buy-in throughout
the process



Considerations

- Form a cross-functional team or steering group
- Involve stakeholders throughout the process (planning, research, design, roll-out)
- Launch and socialise the personas – treat it like an event or a campaign
- Keep going – advocacy and promotion is never done!

Example

Atlassian needed to achieve company-wide buy-in for a unified set of personas. They succeeded by leading a highly collaborative process, inviting stakeholders from engineering, product, and marketing to actively participate in user research and co-create the personas from raw data. This built trust and shared ownership, transforming the personas into a credible, and widely adopted tool.

Relevance

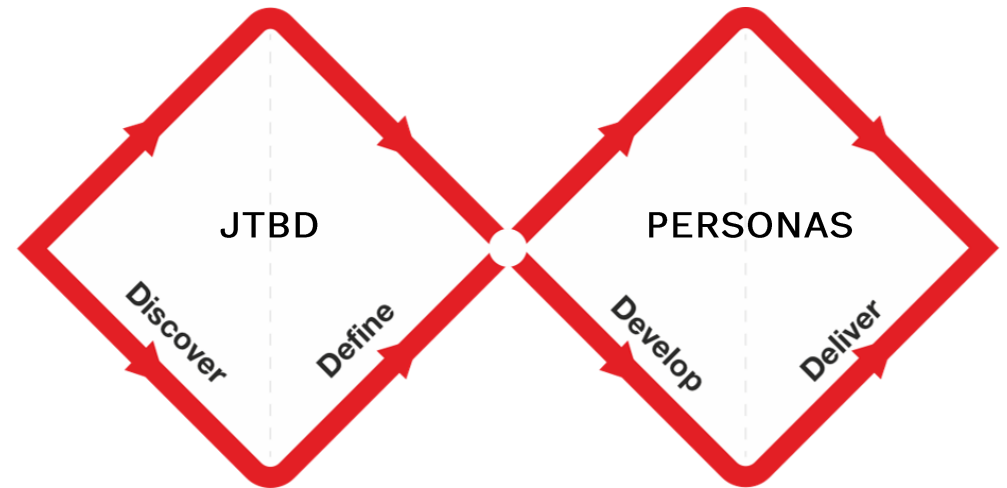
Ensure personas are the right tool for the job



Considerations

- Are you at the right point in the design process to develop personas?
- Will personas deliver the outcomes you want from your colleagues?
- Is building empathy the right approach for your stakeholders?
- Should you be creating personas or a needs-based model / JTBD framework?

Example



JTBD work better when thinking about *what* to build; personas work better when thinking about *how* to build it – discuss!

Commerciality

Connect your personas to
business goals



Considerations

- What are the growth challenges for your business – try building personas around these!
- Which users / personas should you prioritise – e.g. think about who you want to retain / acquire.
- Align personas with marketing segments or audiences
- Think about mapping your persona goals to your business / product KPIs

Example

To combat high churn rates, **Intuit** aligned its commercial goal of increasing trial conversions with a specific persona: ‘Scott, the overwhelmed new entrepreneur,’ an accounting novice needing immediate confidence in the software. By focusing on Scott's anxieties, they redesigned the QuickBooks onboarding to be a simpler, guided experience focused on achieving a quick win, like sending his first invoice.

Storytelling

Make your personas
memorable and real



Considerations

- Write a narrative, not a spec sheet
- Think about novel storytelling techniques – cartoon strips, day-in-the-life storyboards
- Create journey maps and scenarios
- Find a place for real people – user videos, meet the user sessions, etc.

Example

Airbnb famously uses storyboards, like scenes from a movie, to map out the entire user journey. They storyboard a trip from the perspective of a guest persona and the corresponding hosting experience from the host persona's view. This ensures a seamless and reassuring experience for both parties at every touchpoint.

Longevity

Keep your personas alive;
keep them up-to-date



Considerations

- Find an owner / sponsor and personas champions
- Set a review cadence and stick to it
- Create a living persona hub or repository
- Think about the role of conversational AI (e.g. to interrogate the data and ask fresh or speculative questions)
- Plan a continuous cycle of research to update and fill in gaps

Example

Research repositories allow companies to store and share outputs and reuse insights. Companies in this space, like **Dovetail** and **Marvin**, are investing heavily in AI. These products ingest lots of qual data which users can easily organise, summarise, refer back to and ask fresh questions of.



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