

mtm

Personas Toolkit



2025

Persona Activation Cheat Sheet

A practical checklist for keeping personas alive inside your organization.

Visibility

Storytelling

Integration

Refresh Cadence

Stakeholder Engagement

Tactics That Work

Embed personas in dashboards, project docs, briefs, and retros. Use digital “persona cards” in design tools (Figma, Miro, Notion).

Tell a “day in the life” story in kick-offs. Use persona quotes in presentations. Reintroduce personas in retros with new anecdotes or user stories.

Tie personas to KPIs, journeys, and OKRs. Reference personas in sprint planning and backlog prioritization. Use them in design critiques (“Which persona are we solving for?”).

Schedule reviews every 6–12 months. Use fresh data from interviews, analytics, or surveys to update. Add or retire personas as markets evolve.

Nominate “persona champions” per function. Share persona wins (e.g., a design change that improved KPI X). Include personas in onboarding and internal comms.

Why It Matters

Out of sight = out of mind. Frequent exposure builds cultural memory.

Narrative keeps personas emotionally sticky.








Makes personas operational, part of daily language and choices.

Prevents drift and obsolescence; keeps alignment with reality.

Creates ownership and advocacy beyond UX.








Persona Activation Canvas

A lean framework to map how personas connect to performance, influence, and communication.

| Section | Guiding Question | What to Capture |
|---|---|--|
|  Persona Focus + Evidence Anchor | Who is this persona, and what new evidence validates their continued relevance? | Paint a quick picture name, role, what they care about most. Add one fresh proof point from recent research or behaviour data that shows this persona is still real. |
|  Business Outcomes & Impact Hypothesis | Which business goals or KPIs does serving this persona directly affect and how? | Connect human needs to hard results. Write one sentence: “If we help ___ achieve ___, we’ll see ___ improve.” (Think adoption, retention, conversion, satisfaction.) |
|  Stakeholders, Owners & Influencers | Who uses, owns, or influences this persona internally? | List the people and teams that use this persona to make decisions. Mark your “champions” and “blockers.” Decide who owns keeping this persona alive. |
|  Moments that Matter (Journey & Touchpoints) | Where does this persona experience the highest emotional or commercial impact? | Highlight one or two moments where success or frustration really matters, where this persona wins, or struggles. Focus where small changes create big impact. |
|  Frictions & Root Causes | What’s getting in their way and what’s behind it? | Capture their top pain points, but look deeper. Which are user challenges? Which come from your systems or processes? Separate symptoms from causes. |
|  Activation Opportunities (Channel + Frequency) | How will we bring this persona to life across the organization? | Choose a few rituals or channels where this persona should show up — sprint reviews, onboarding, dashboards, all-hands. Make it visible and regular. |
|  Success Signals & Maturity Levels | How will we know if this persona is alive, used, and driving value? | Define what “success” looks like. Can teams name them? Are decisions influenced? Do KPIs shift? Choose 1–2 visible signals you’ll track each quarter. |





















Blank Persona Activation Canvas Template

A fillable framework to connect human insight to business impact. Create one canvas per primary persona.

| Section | Guiding Question | Your Input / Notes |
|--|---|--------------------|
|  Persona Focus + Evidence Anchor | Who is this persona, and what new evidence validates their continued relevance? | |
|  Business Outcomes & Impact Hypothesis | Which business goals or KPIs does serving this persona directly affect and how? | |
|  Stakeholders, Owners & Influencers | Who uses, owns, or influences this persona internally? | |
|  Moments that Matter (Journey & Touchpoints) | Where does this persona experience the highest emotional or commercial impact? | |
|  Frictions & Root Causes | What's getting in their way and what's behind it? | |
|  Activation Opportunities (Channel + Frequency) | How will we bring this persona to life across the organization? | |
|  Success Signals & Maturity Levels | How will we know if this persona is alive, used, and driving value? | |

Persona Health Check Checklist

A diagnostic tool for measuring persona effectiveness

| Category | Diagnostic Question | Indicators of Health |
|--|--|--|
|  | 1. Alive or Dead? Are personas visible and used in daily work? |  Referenced in meetings, briefs, and metrics.  Rarely mentioned.  Forgotten since launch. |
|  | 2. Story Power Do they evoke empathy and engagement? |  Have real quotes, stories, and context.  Generic and dry.  Unreliable stock photo profiles. |
|  | 3. Commercial Anchor Are they linked to measurable business outcomes? |  Mapped to KPIs and OKRs.  Mentioned but not quantified.  Seen as “nice to have.” |
|  | 4. Up-to-Date Do they reflect current research and user behavior? |  Updated in last 12 months.  Some new data missing.  Based on outdated assumptions. |
|  | 5. Actionable Do they shape real product or design decisions? |  Used in prioritization and critiques.  Occasionally referenced.  No influence on decisions. |

How to Use

Run this health check every 6–12 months.

Score each category on a 1–5 scale (1 = poor, 5 = strong).

Identify gaps and define actions.






Scoring

21–25: *Fully alive*. Personas drive decisions and empathy.

15–20: *At risk*. Useful, but need refresh and re-engagement.

<15: *Dead or decorative*. Rebuild from research or reboot adoption.

Top 5 Common Mistakes & How to Fix Them

| Common Mistake | Why It Happens | How to Fix It |
|--|---|---|
|  <p>1. Built in a silo</p> | Personas are created by UX alone, without cross-functional input, leading to poor adoption. | Co-create. Involve product, marketing, sales, and engineering early. Shared creation = shared ownership. |
|  <p>2. Based on assumptions, not evidence</p> | Time pressure or lack of research leads to “fictional” personas. | Ground in real data. Use interviews, analytics, and surveys. Note data sources in each persona for transparency. |
|  <p>3. Overly demographic or superficial</p> | Teams default to easy labels (age, gender, job title) instead of meaningful goals and behaviours. | Focus on motivation and behaviour. Design around what users are trying to achieve, not who they are statistically. |
|  <p>4. No commercial connection</p> | Personas are empathy tools with no link to business impact. | Anchor to outcomes. Map each persona’s goals and pains to KPIs (e.g., ease → retention; trust → conversion). |
|  <p>5. Forgotten after launch</p> | Personas are presented once, then ignored. | Operationalize and refresh. Reference personas in planning, design critiques, and quarterly reviews. Update every 6–12 months. |



Contact:

Michael Thompson

Head of UX Research

Michael.Thompson@wearemtm.com

Eva Muhr

Senior UX Researcher

Eva.Muhr@wearemtm.com