UPWARD

HOW TO BUILD DATA-DRIVEN PERSONAS

...YOU'LL ACTUALLY USE

#goupwardtoday | @marykgarrick

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Presentation Takeaways

1
A clear idea of what a persona is & what it isn't

2
A real life example of how a persona was used to drive better conversion

3
Eight resources to help you create data-rich personas at home

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TAKEAWAY #1

WHAT A PERSONA IS & WHAT IT ISN'T

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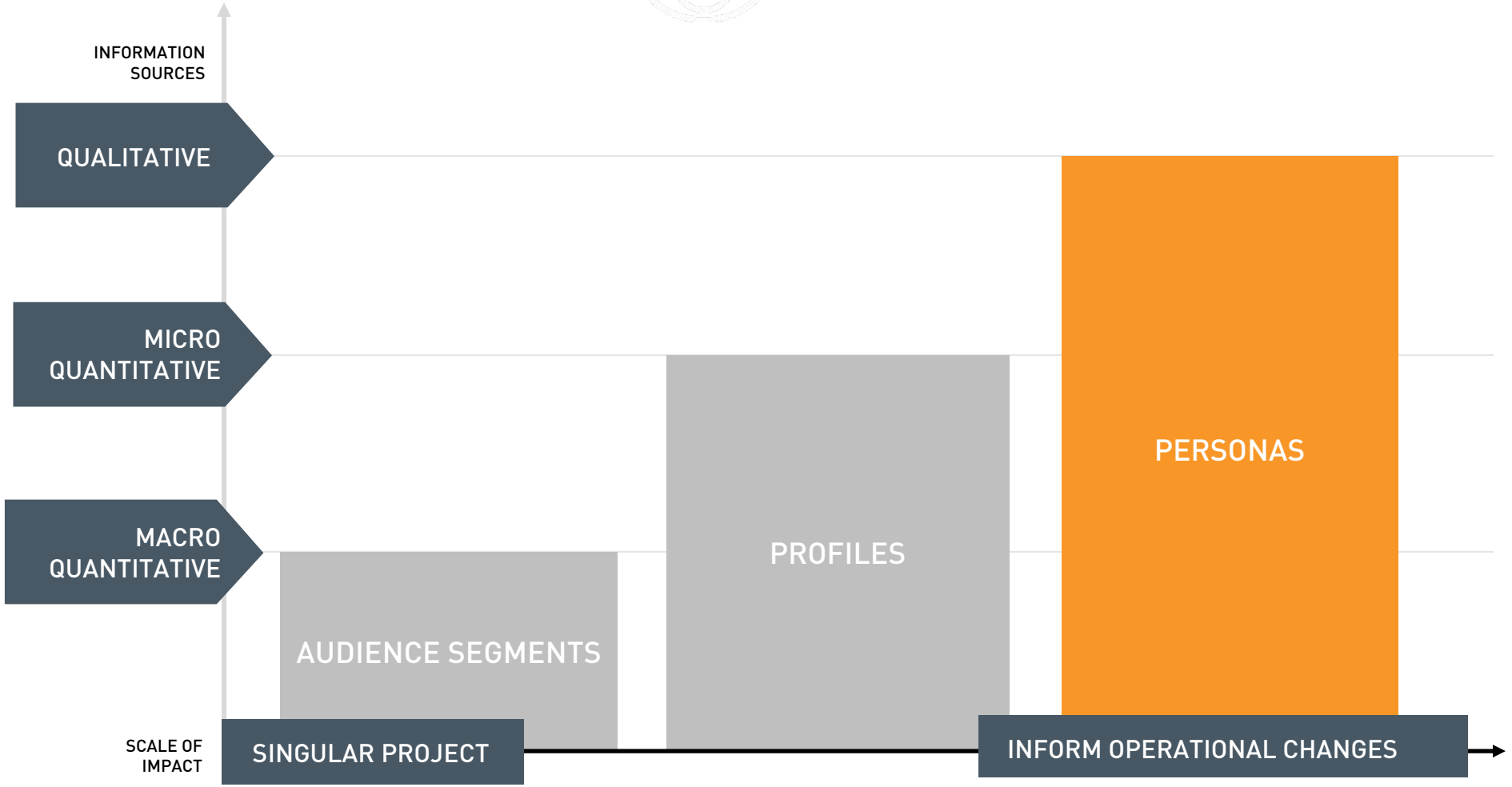
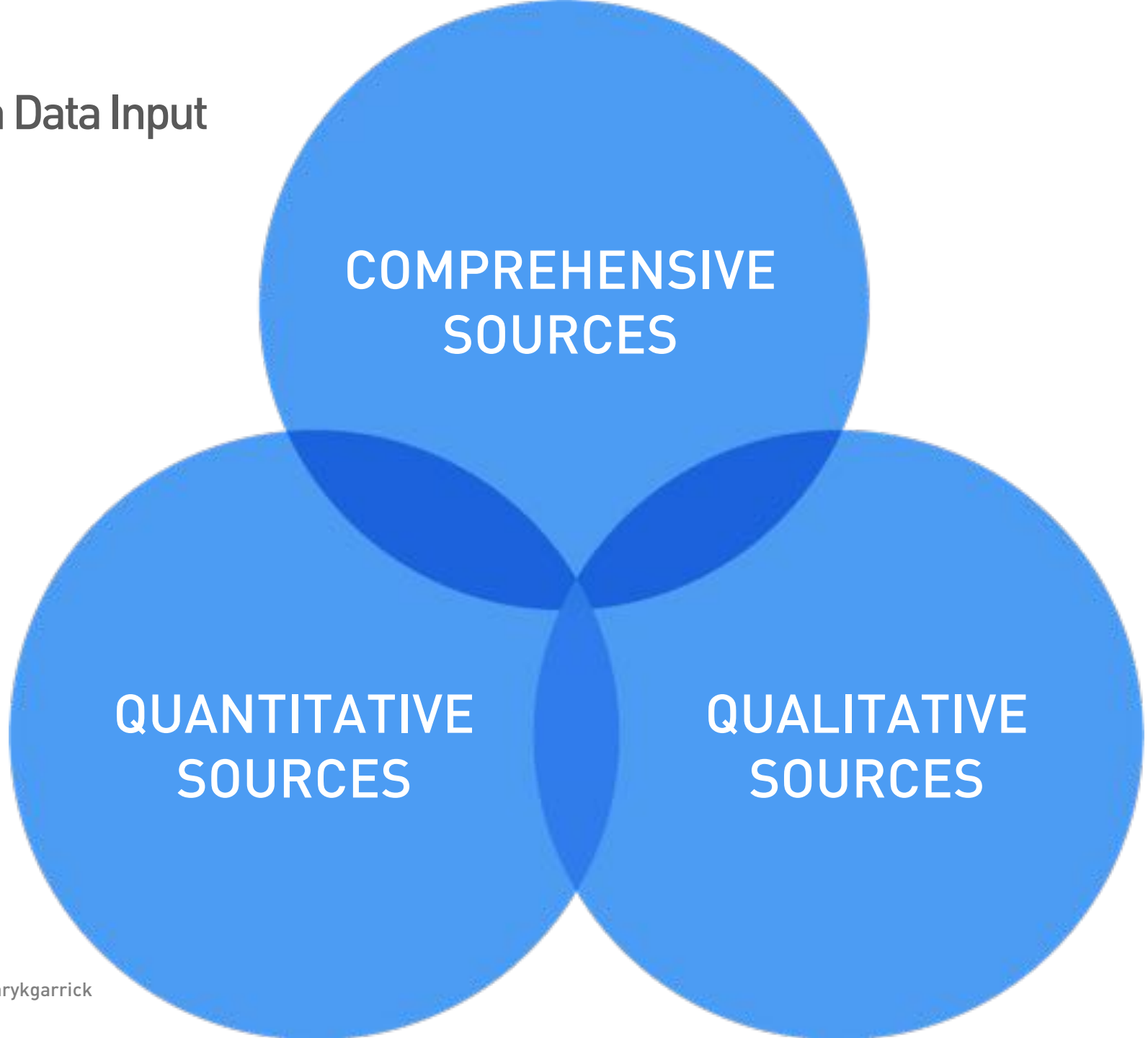
Audience Research



Persona Data Input



Ideal Elements Of A Persona

- A Day in the Life
- Objectives / Problems
- Obstacles
- Orientation
- Questions
- Preferences
- Key Words + Phrases
- Moments or Jobs to Be Done
- Engagement Scenarios + User Paths
- Influencers/Relationship to Other Personas
- NEW: Ad Targeting Criteria

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Ideal Elements of a Persona

OBJECTIVES

- a.k.a. What They Want

PROBLEMS

- a.k.a. Why They Don't Have It

Ideal Elements of a Persona

OBSTACLES

- What's stopping them...all along the way
- What micro decisions are they required to make?
- People obstacles?
- Political obstacles?

Ideal Elements of a Persona

ORIENTATION

- How long are they in their role?
- How far into their career?
- Personality traits?
- Political influence at company?
- Political leaning? Religion? Values?

Ideal Elements of a Persona

QUESTIONS

- What are they asking?
- And when?

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PREFERENCES

- Where do they hang out?
- Where do they get their info?
- How do they like to receive communications?

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KEY WORDS & PHRASES

- "Solutions" vs. "Products"
  - "UV Resistant Polymer Solutions" vs. "Plastics with UV Resistance"
- Phrasing from Interviews
- Onsite Search Phrasing

Ideal Elements of a Persona

MOMENTS or JTBD

- Lawn care product example
- Helps fuel customer journey mapping

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Ideal Elements of a Persona

DAY IN THE LIFE

- Write this last
- Include relationship with other personas

ENGAGEMENT SCENARIOS

- How does it all work together?

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AD TARGETING CRITERIA

- What elements differentiate this persona when put into practical use?
- Ask a team member to go through the steps of setting up an ad for this persona & use as a litmus test

MESSAGING: IMAGERY + LANGUAGE + FRAMING

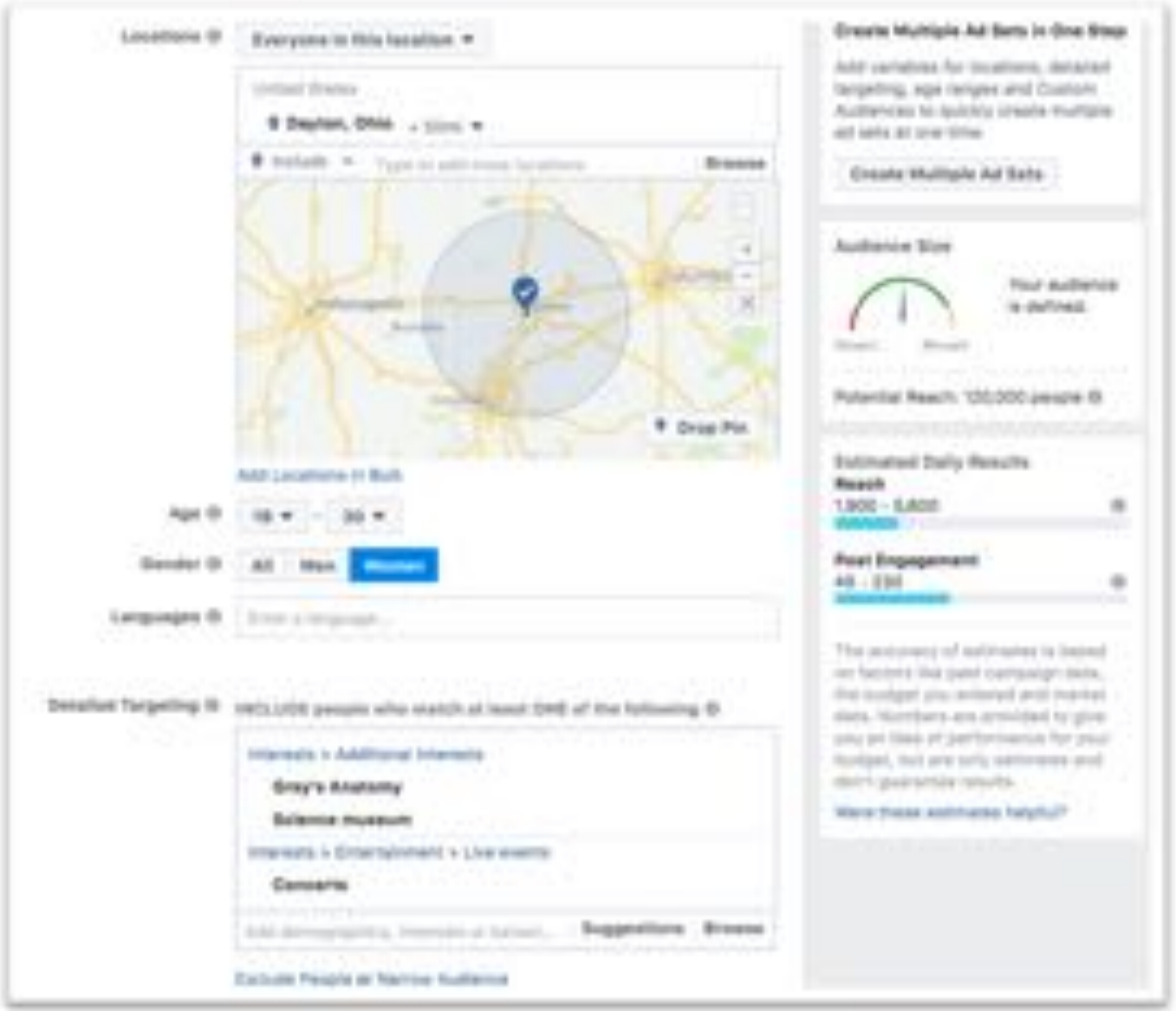
The Learner

Imagery	Pediatric-focused imagery. Imagery that showcases the technology and opportunities in the hospital. Nurses with children.
Language	Language focused around unique opportunities at [redacted]. Speak specifically about working with children.
Sample Phrasing	"Improve children's lives." "The tools you need to go above and beyond."

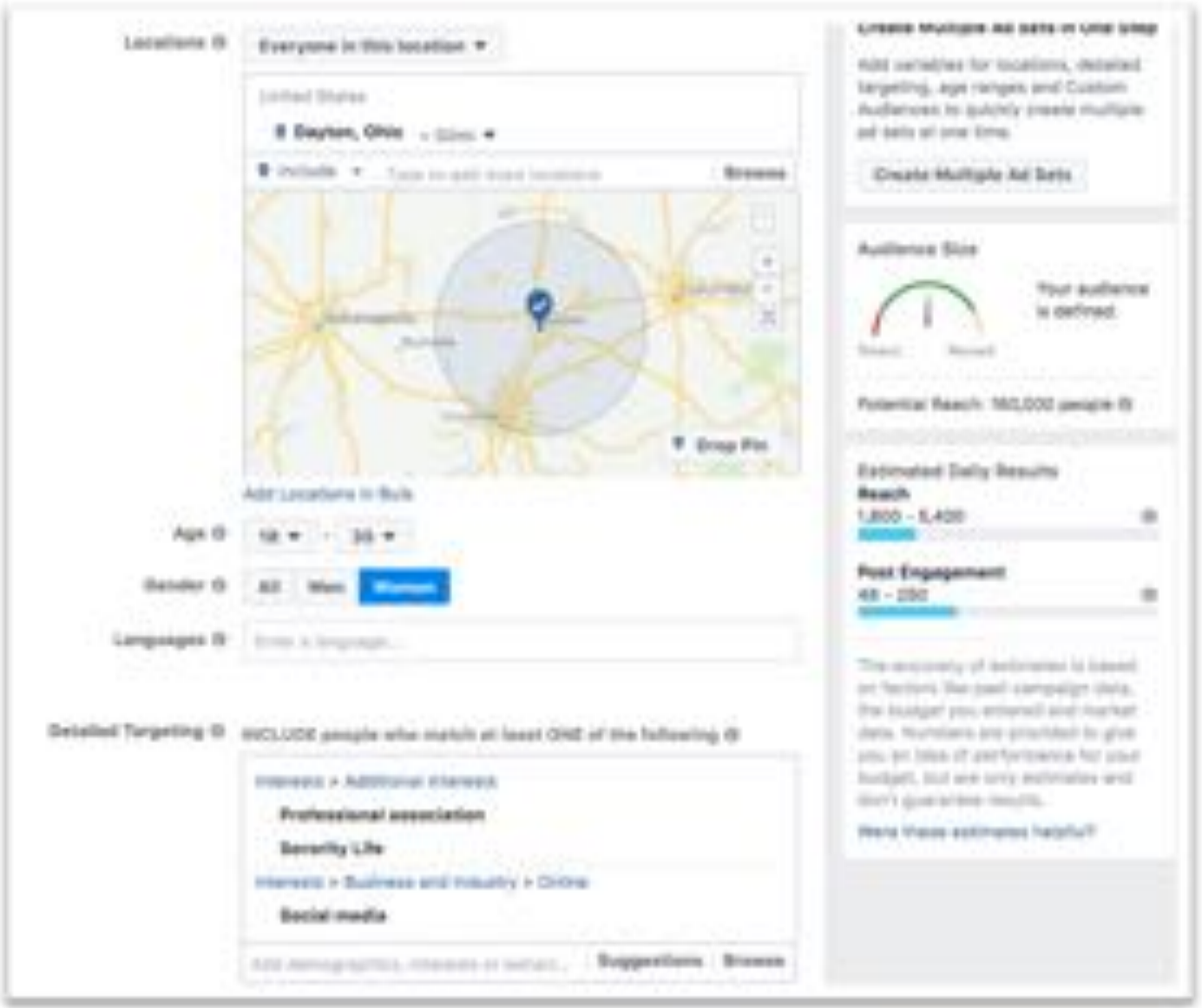
The Liaison

Imagery	Imagery focused on facilities, one-on-one interactions with patients and general nursing. Images of staff laughing and talking.
Language	Language focused on nursing as a whole. Extol [redacted] reputation and opportunities that exist for a nurse like her.
Sample Phrasing	"You make a difference." "Let's go above and beyond."

FACEBOOK TARGETING EXAMPLE FOR THE LEARNER



FACEBOOK TARGETING EXAMPLE FOR THE LIAISON



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TAKEAWAY #2

A REAL LIFE EXAMPLE OF A PERSONA THAT DELIVERS BETTER RESULTS

The Content

Real-World Example

The Video

TrendWatch™: Materials Matter for Advanced Mobility

Real-World Example

Persona for Design Engineer

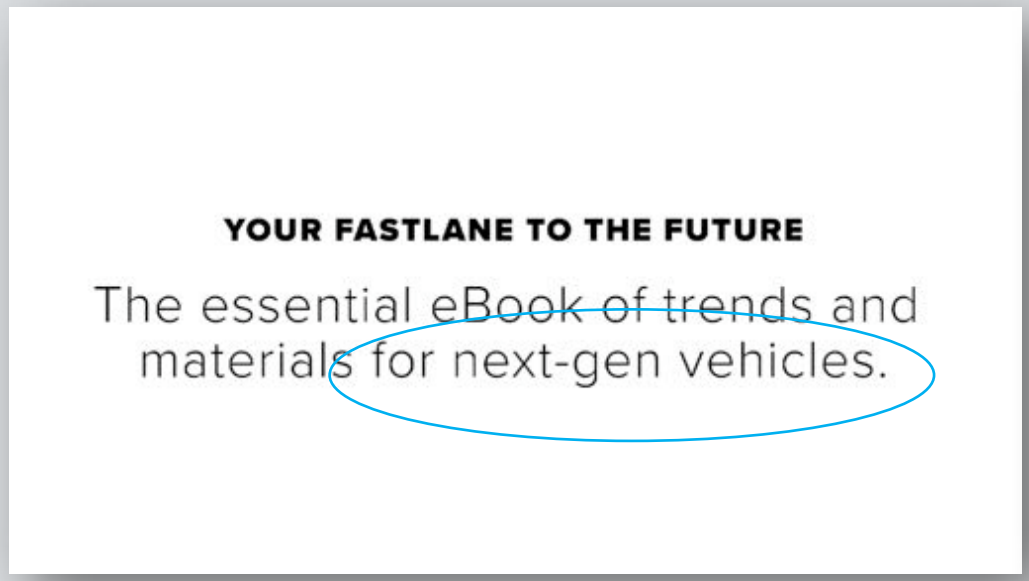
Real-World Example

Persona for Design Engineer

Real-World Example

UPWARD

BEFORE



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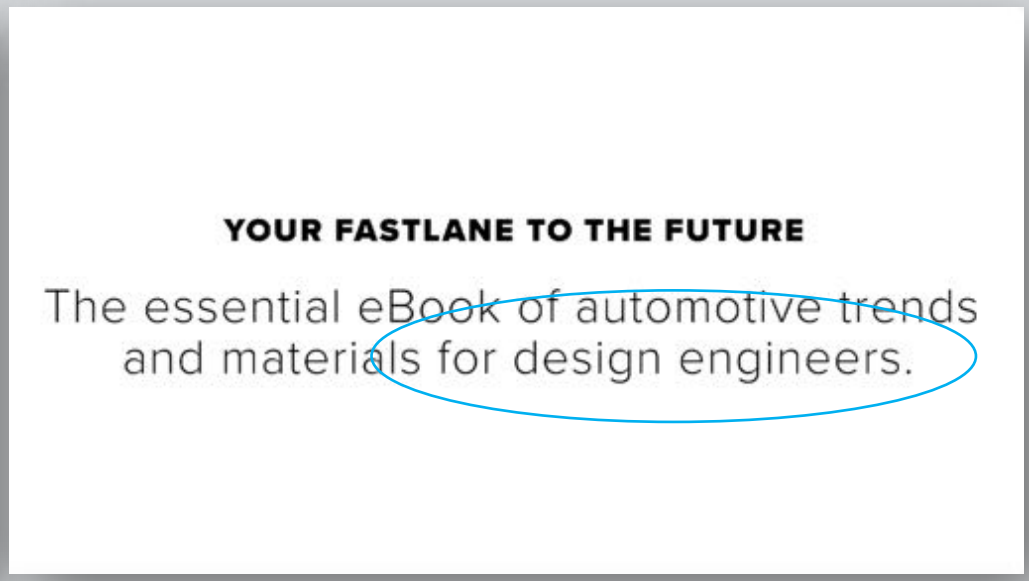

UPWARD

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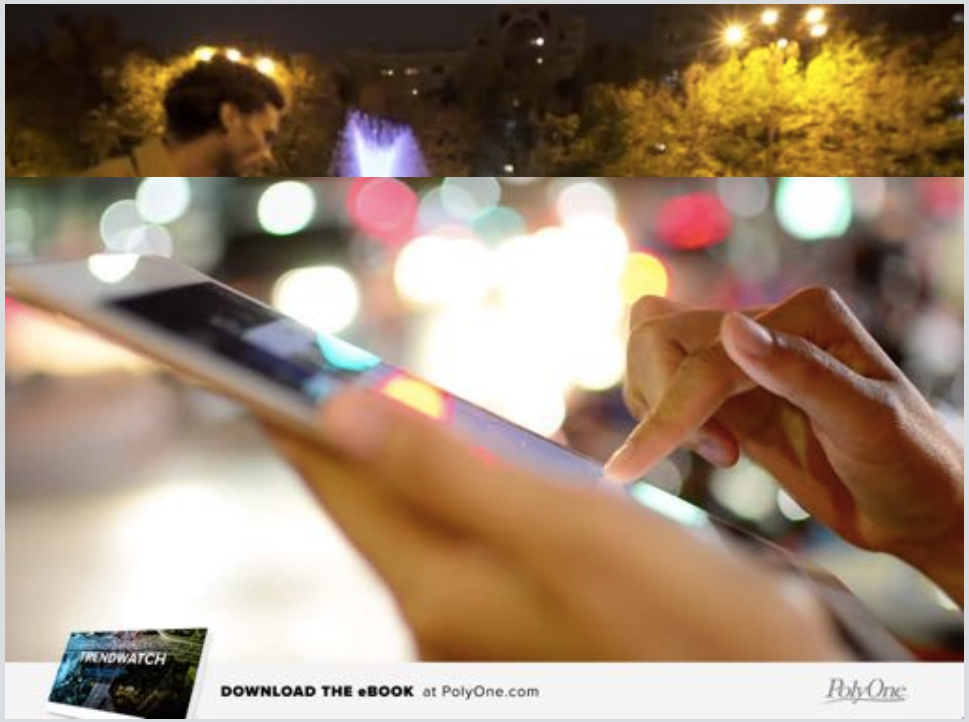


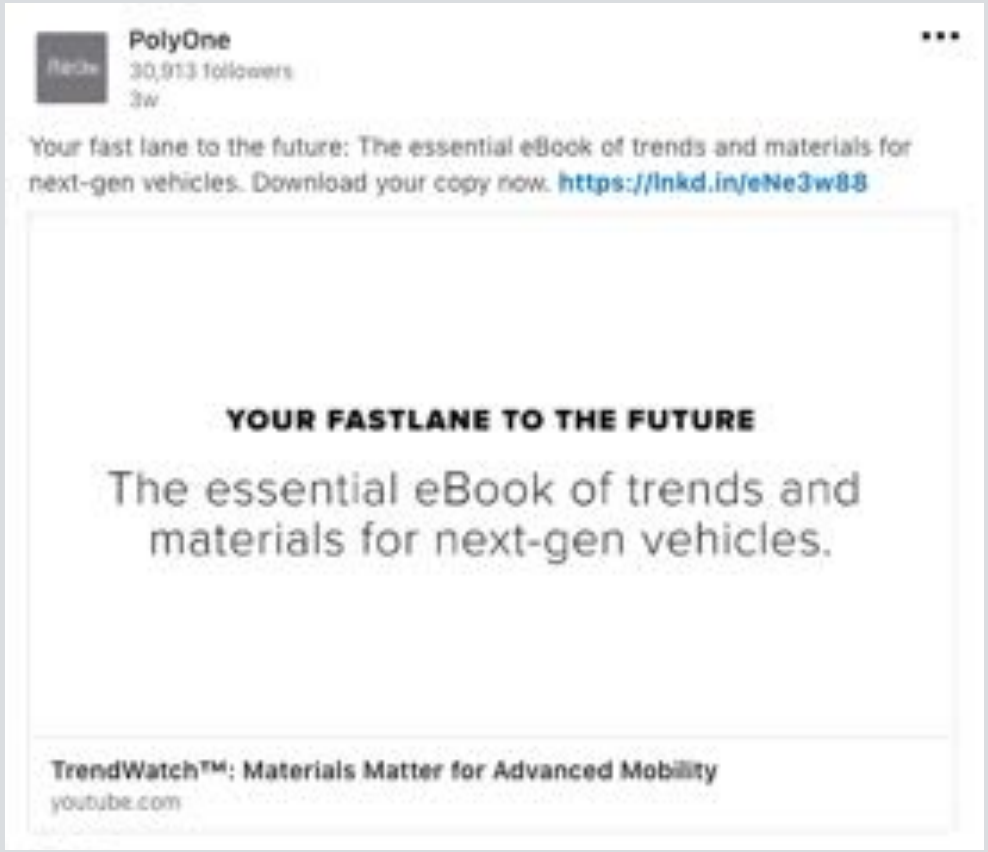
AFTER

UPWARD

BEFORE

AFTER

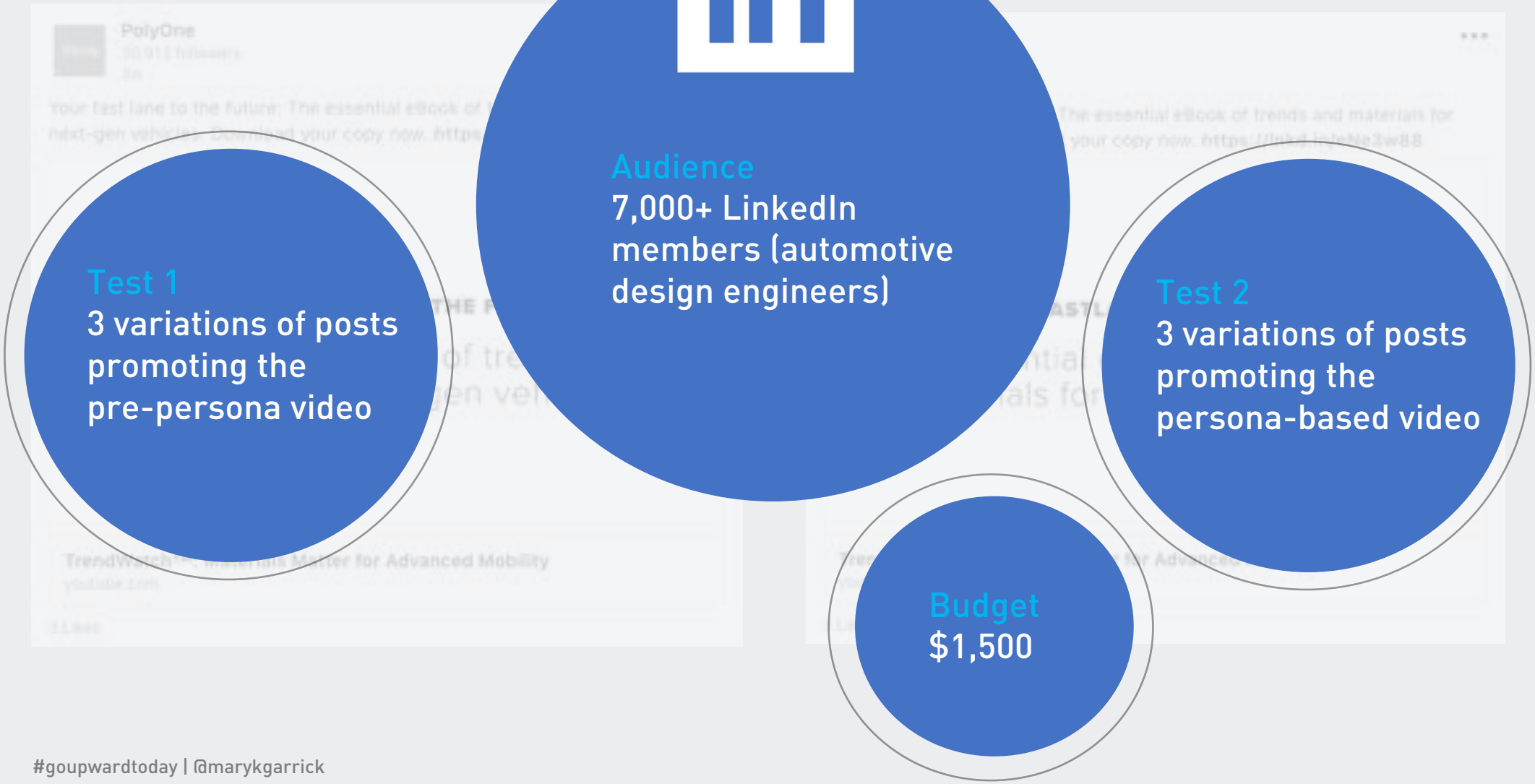
LINKEDIN A/B TEST



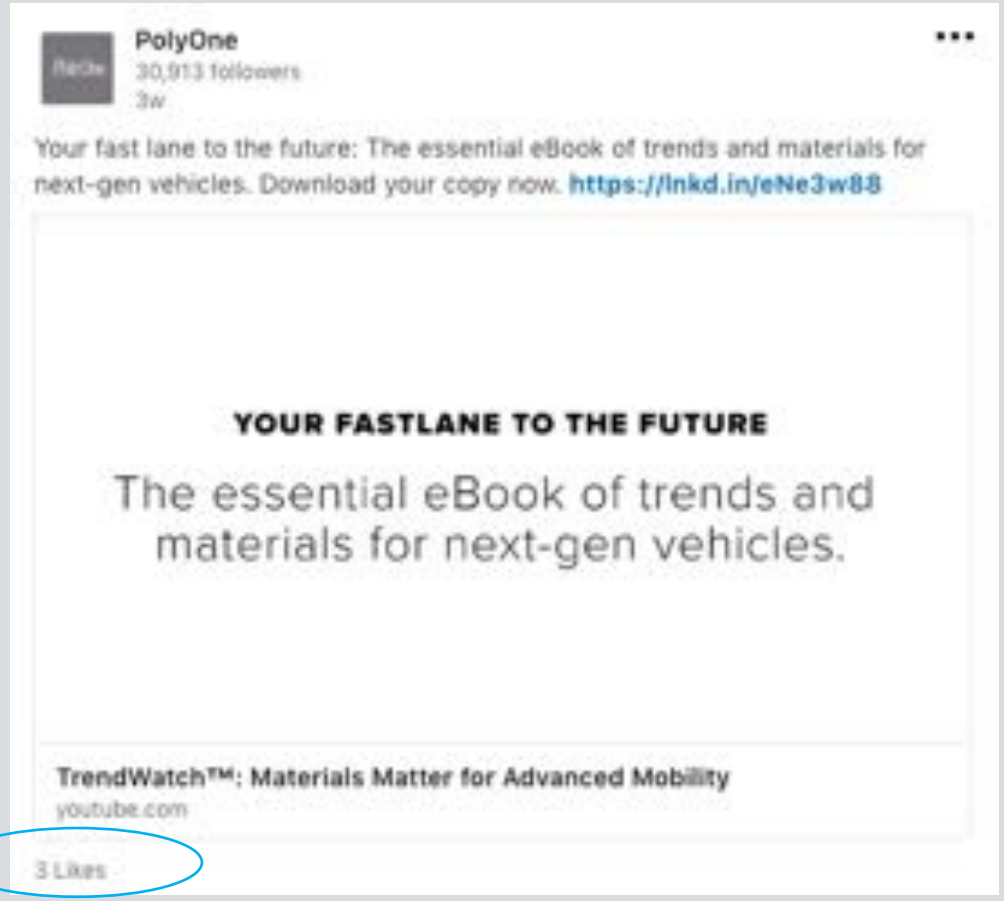
TEST 1: PRE-PERSONA POST

TEST 2: PERSONA-BASED POST

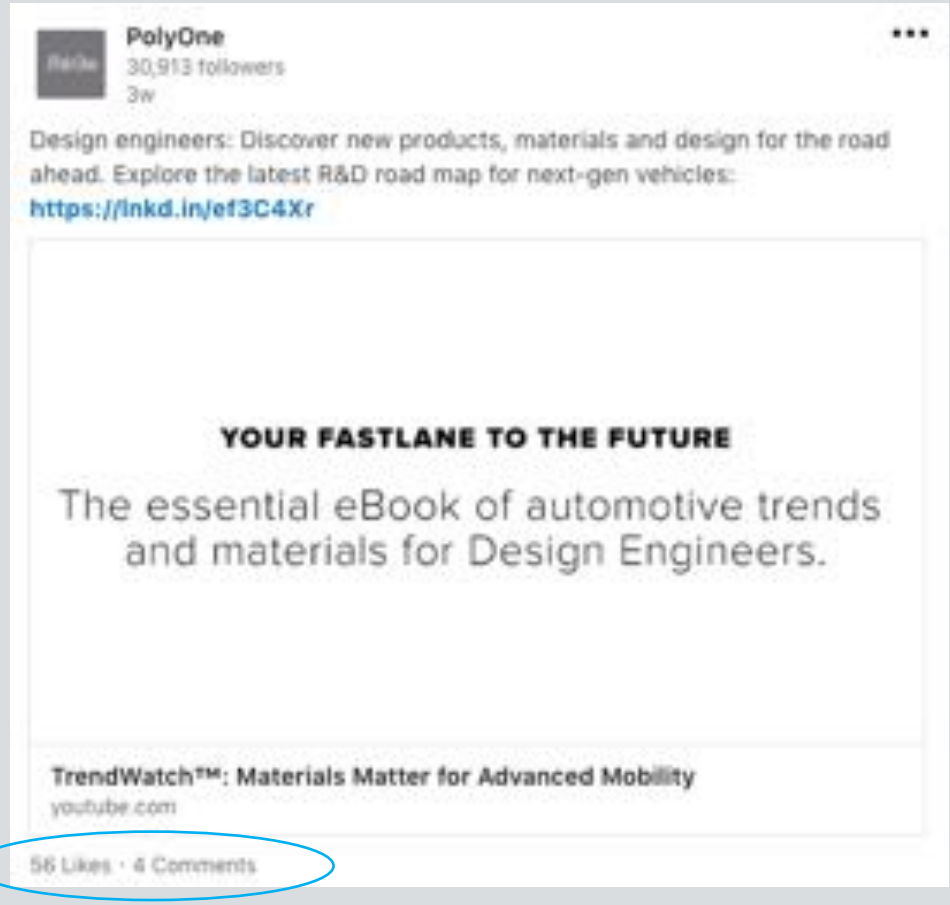
LINKEDIN A/B TEST



LINKEDIN A/B TEST



TEST 1: PRE-PERSONA POST



TEST 2: PERSONA-BASED POST

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277
clicks

649%
more clicks
compared to
Test 1 (37 clicks)

37%
higher CTR

1362.5%
more social
engagements
(likes, comments,
shares and follows)

54%
higher social
engagement rate

Persona-Based Test Set (Test 2) Wins Across The Board Compared to Pre-Persona Test Set (Test 1)

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TAKEAWAY #3

8 HELPFUL RESOURCES TO CREATE DATA-RICH PERSONAS

#1 Interviews

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5 Questions To Ask Every Prospect Or Customer

1. Give me some examples of things you'd like to accomplish [in life, in work, as a parent, as a wife/husband, for yourself], relative to our product/service?
2. What's getting in the way of you accomplishing it?
3. What are your top news & information sources?
4. What made you realize you needed a product/service like ours? Describe the moment in as much detail as possible.
5. What factors lead you to contact us/become a customer?

#1 Interviews

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INTERVIEW + FOCUS GROUP QUESTIONS

- A Day in the Life
- Objectives / Problems
- Obstacles
- Orientation
- Questions
- Preferences
- Key Words + Phrases
- Moments
- Engagement Scenarios + User Paths
- Influencers/Relationship to Other Personas

- What are some frustrations you have with your current job or jobs you've had in the past ?
- What are some frustrations or obstacles you experienced during your job search?
- What do you wish your hospital did better?

- When you first started looking for/evaluating hospitals during your job search, what did you look for?

#2 Quora

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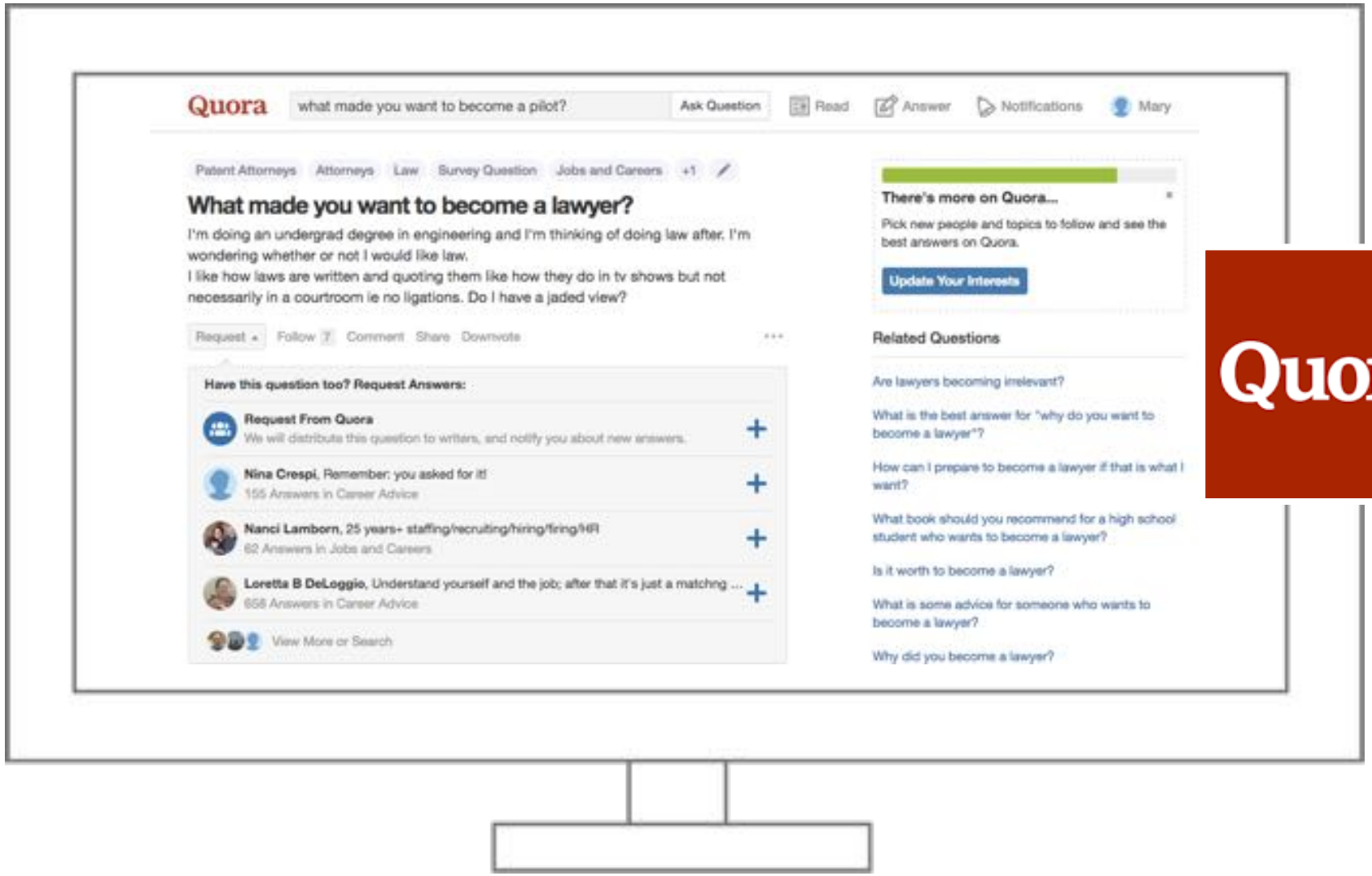
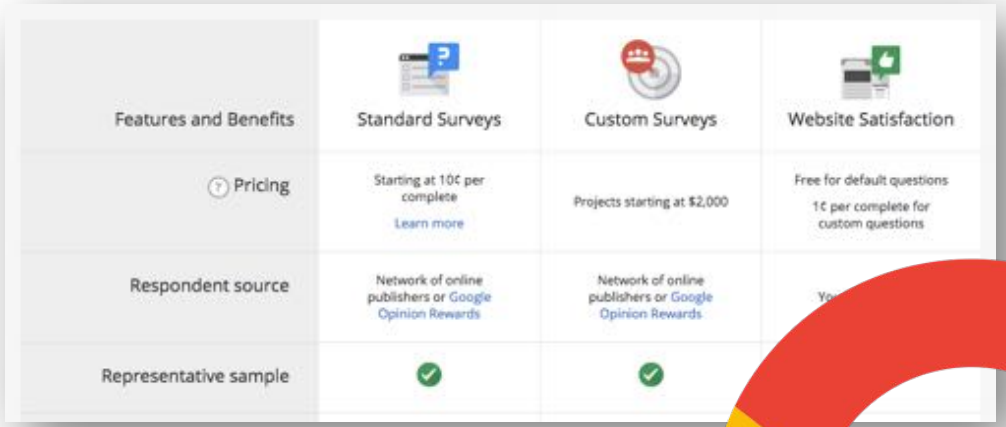
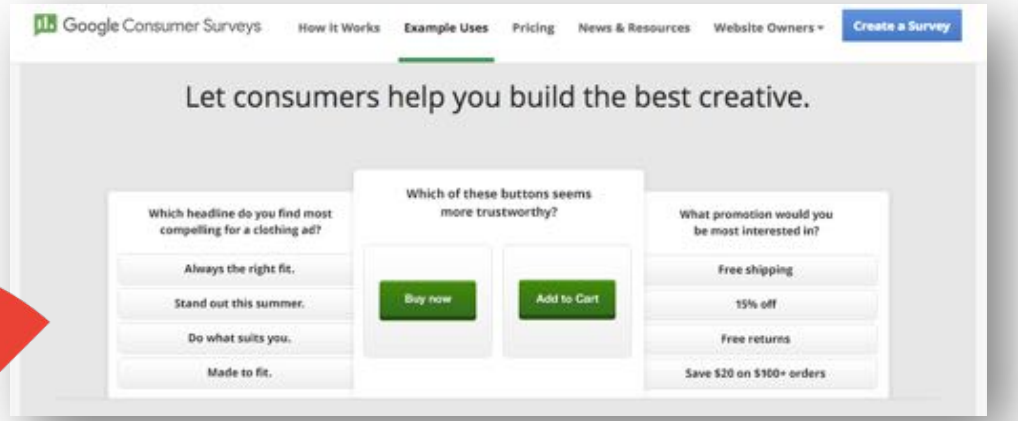
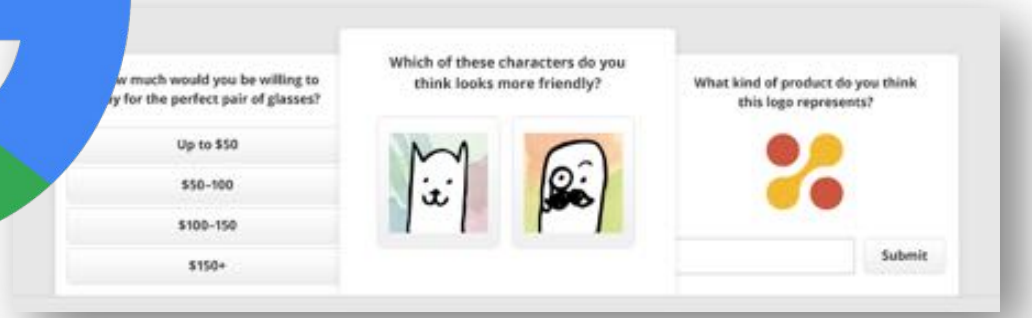


#3 Google Consumer Surveys







#4 Email Data Intelligence

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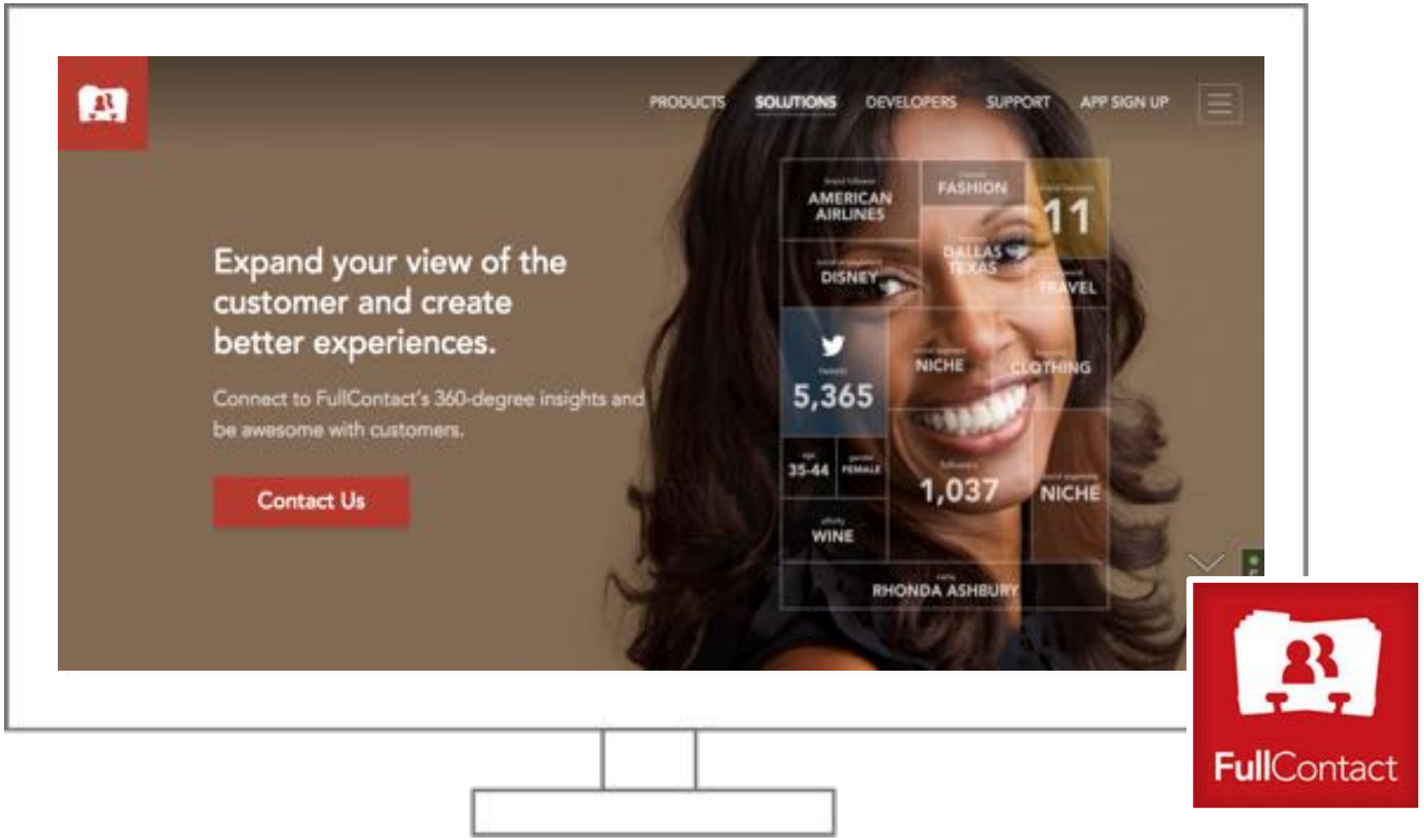
webbula
The Data Quality Experts

Cloud Hygiene & Affinity Data Insights for Hundreds of Subcategories:

- Automotive Data
- Demographic Data
- Financial Data
- Interest Data
- Political Data

#4 Email Data Intelligence

UPWARD



#5 DemographicsPro

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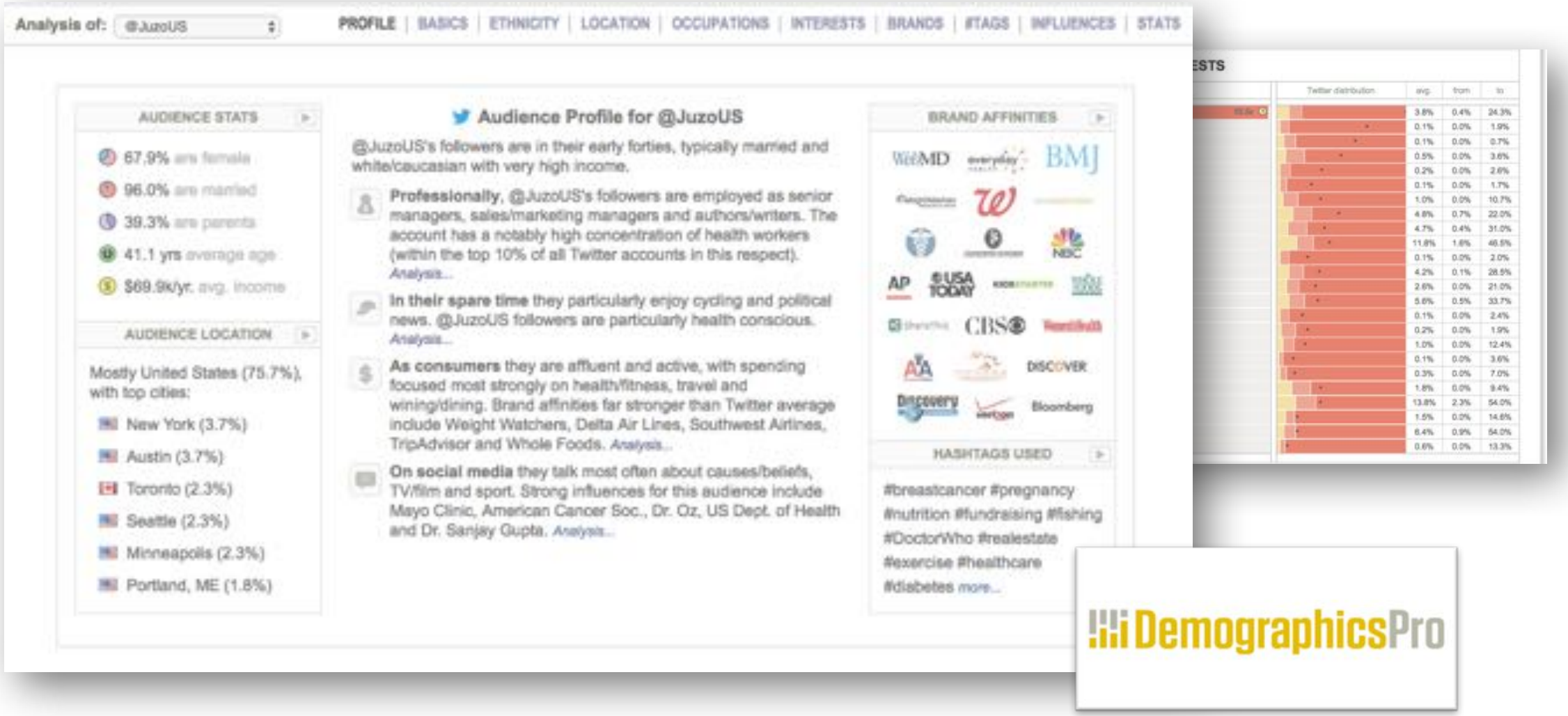

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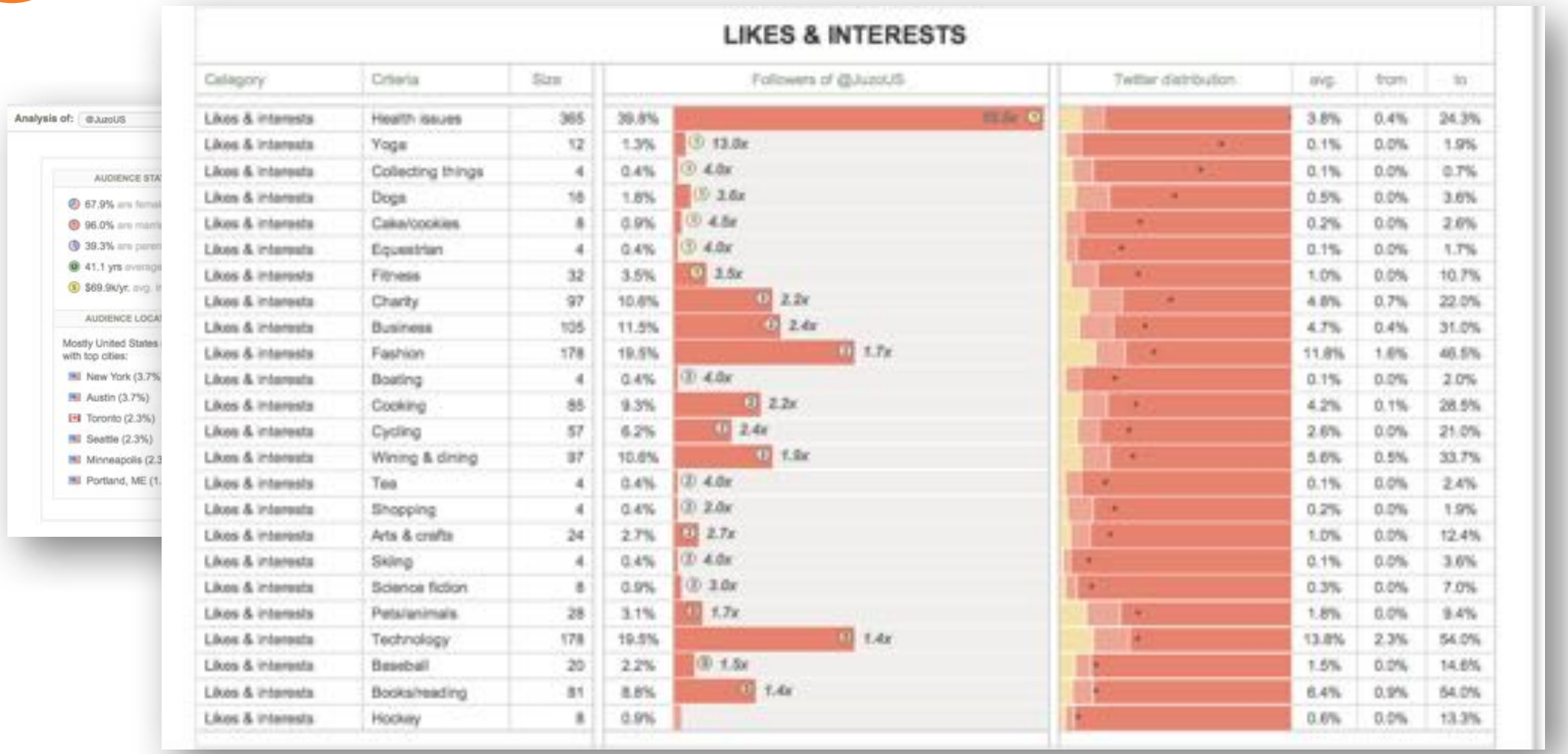

#6 LinkedIn Profile Scraping

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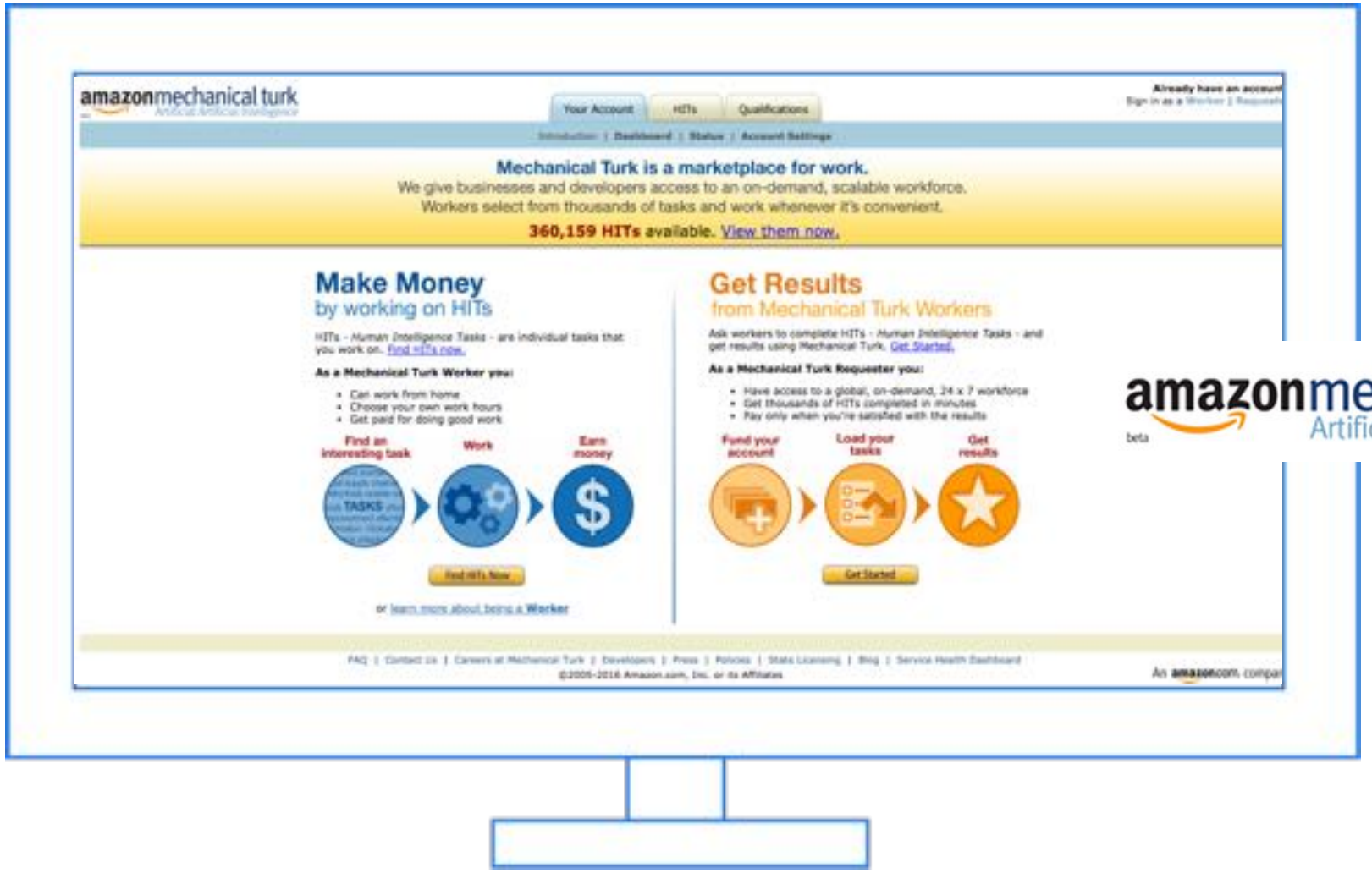
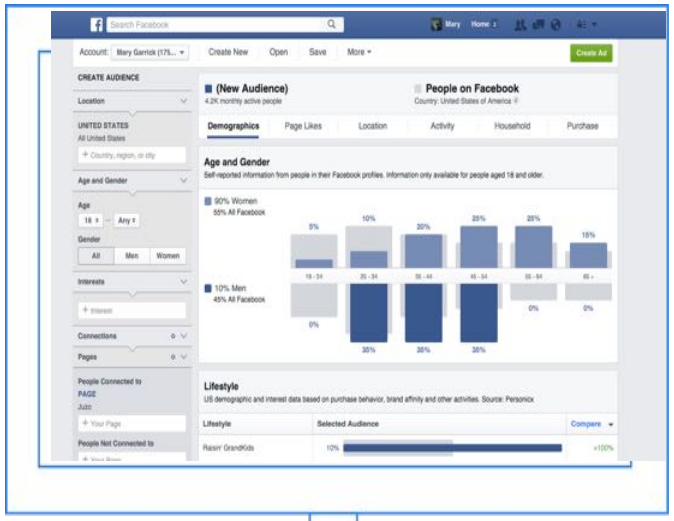
- Patterns of employment history
- Recommendations
- Following
- Groups
- Volunteer activity
- Skills + endorsements
- Number of connections

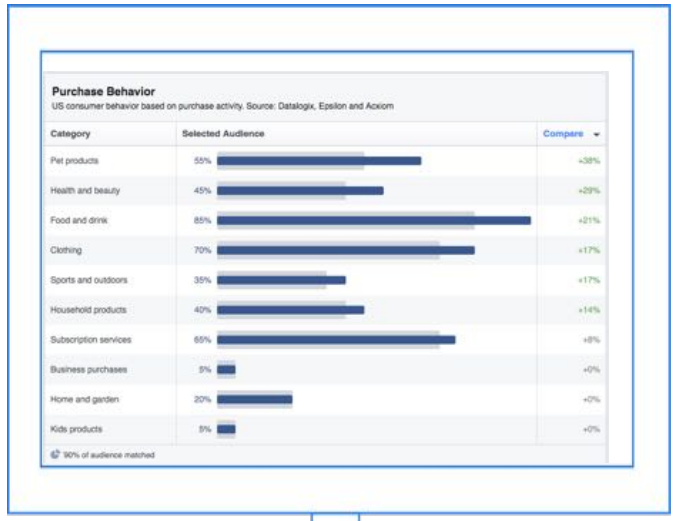
Bonus Tip



amazonmechanical turk
beta
Artificial Artificial Intelligence

#7 Facebook Audience Insights





https://www.facebook.com/ads/audience_insights/

Bonus Tip

GEOGRAPHIC SEGMENTATION PROFILES

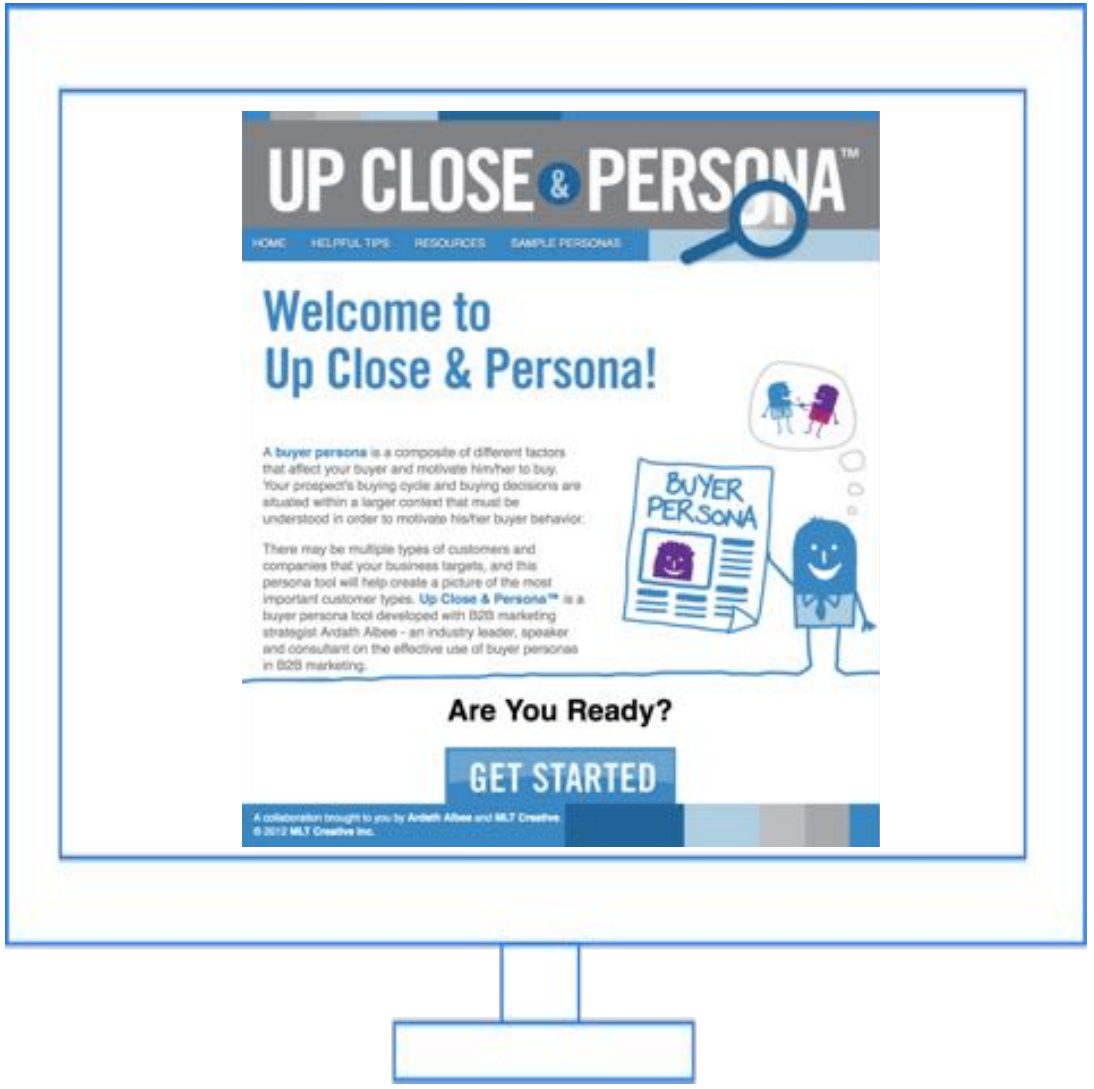
ESRI
esri.com/data/tapestry/zip-lookup

Claritas
segmentationsolutions.nielsen.com/mybestsegments

#8 User Testing & Exit Surveys

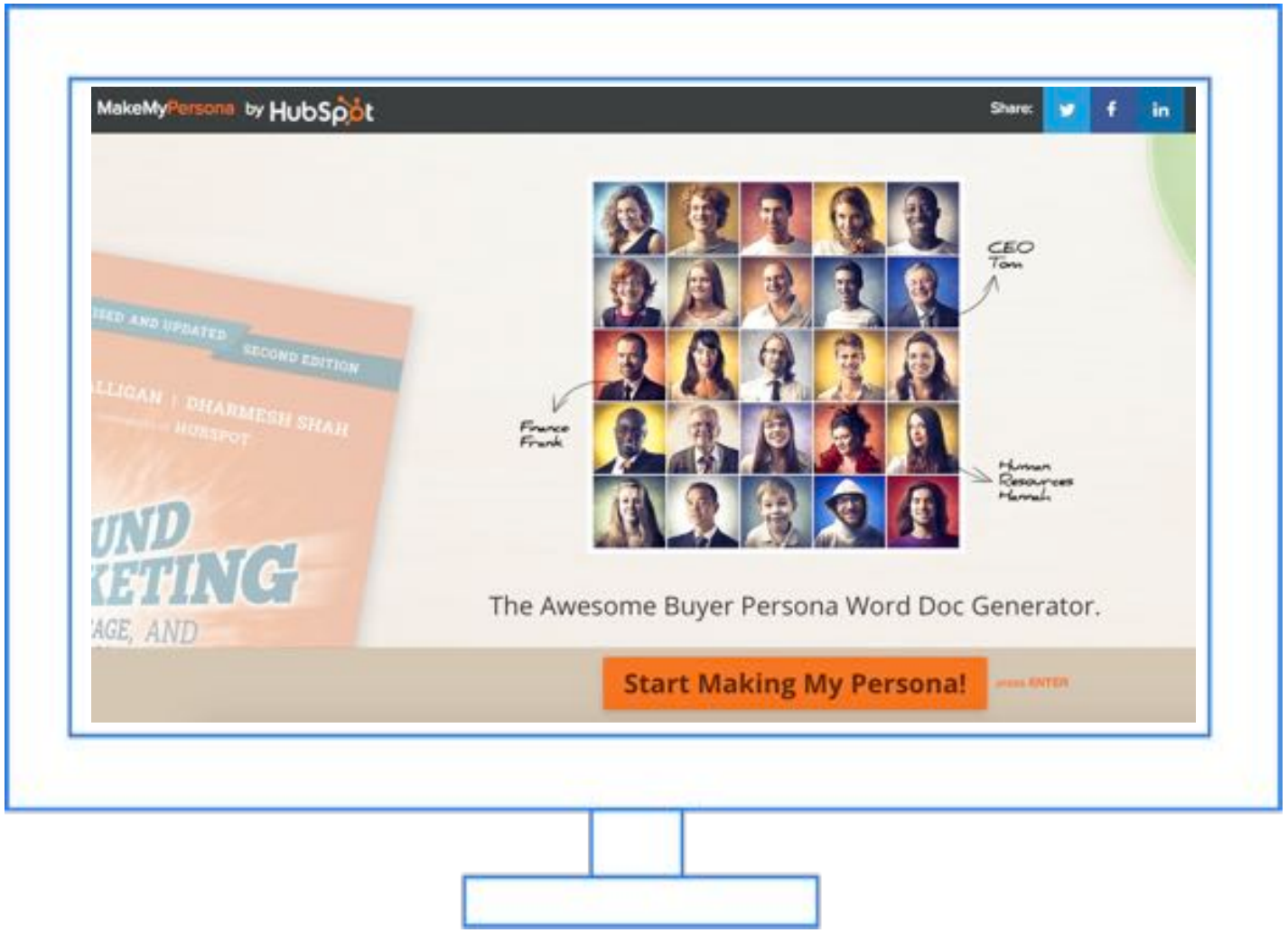
Bonus Tip

Persona Builder by Ardath Albee
UpCloseandPersona.com



Bonus Tip

Persona Builder by HubSpot
MakeMyPersona.com



Bonus Tip

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New Tools I'm Investigating

cubeyou

UXPRESSIA

PULSAR

Coming Soon...

SparkToro

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