



May 8, 2008

Use Personas To Design For Engagement

Highlights From A Panel At Forrester's Marketing Forum 2008

by **Vidya L. Drego**

with Bruce D. Temkin and Andrew McInnes

EXECUTIVE SUMMARY

At Forrester's Marketing Forum, we held a session with three pairs of agencies and clients that have used personas very effectively. When QVC and Critical Mass redesigned the QVC Web site to create a community for frequent television shoppers, personas helped them choose and prioritize the right features to build. Personas also helped Enlighten and Thornburg Mortgage create a site with specific features for all of their personas that tripled the visits to important sections and increased repeat visits and time spent on the site. St. Jude Children's Research Hospital and WHITTMANHART used personas to create two interactive fundraising sites to give frequent donors access to better tools and keep them more engaged with the children of the hospital.

FOCUSING ON USER NEEDS CAN HELP INCREASE ENGAGEMENT

At Forrester's Marketing Forum 2008, Forrester defined engagement as the level of involvement, interaction, intimacy, and influence a customer has for or with a brand over time.¹ As part of the event, we assembled a panel of agencies and their clients to discuss how personas can help create sites that better engage their audiences (see Figure 1).

- **QVC builds connections across channels.** QVC hoped to engage existing customers of its TV network with a redesign of its Web site. To achieve this goal, the company hired Critical Mass, which created three personas from extensive research conducted by IDEO. Each new feature for the Web site was scored on a scale from 1 to 5 based on how much value it would provide for each persona, the overall level of effort to build and support that feature, and the value it presented for the business (see Figure 2). QVC then prioritized the highest-scoring features. The newly redesigned QVC site now serves as a place for a highly engaged television community to search for products they've seen on TV, post comments and reviews, engage in discussions, and view products in rich detail.² The company has seen improved conversion rates as it supports customers who shop across channels.
- **Thornburg Mortgage keeps customers on its site longer.** In early 2007, Thornburg Mortgage, a low-risk mortgage provider, wanted to prepare for the impending refinance boom with a redesign of its Web site. Its agency, Enlighten, created four personas, each of which had a direct impact on the design of the new Thornburg mortgage site. Features like single sign-on for multiple loans, a dashboard view of multiple types of loans from vacation home to primary residence, a profile of the user's mortgage broker, and a plethora of investment tools for the more driven investor were all features that resulted directly from needs of the four personas (see Figure 3). The result of these

efforts? Thornburg has seen visits to the MyMortgage section of the site go up 354%, and repeat visitors are up by 62%. Prior to the redesign, only 28% of visits were longer than one minute — but that number jumped to 46% after the redesign.

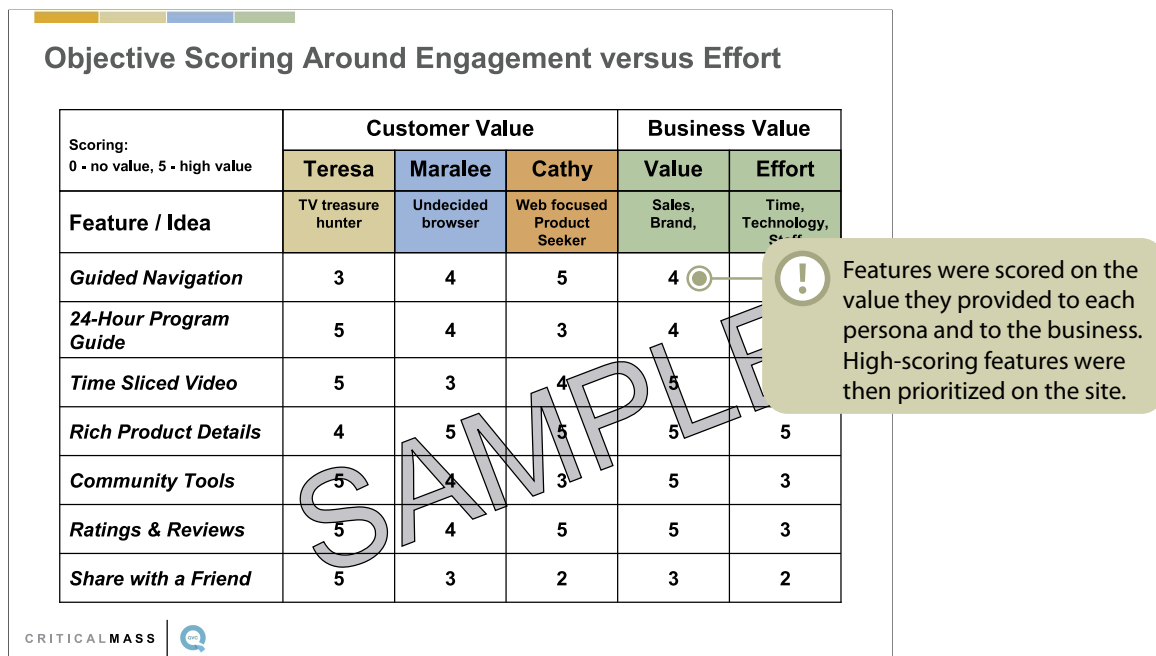
Figure 1 Agencies And Their Clients Discuss Personas At Forrester’s Marketing Forum 2008

Client	Agency
QVC Mike Madaio, chief Internet architect	Critical Mass Neil Clemmons, senior VP strategy
Thornburg Mortgage Leah Swanson, VP of marketing programs	Enlighten Laurel Erickson, engagement manager
St. Jude Children’s Research Hospital Erica Kloehn, senior director acquisition & funding programs	WHITTMANHART Carol Banks Setter, national director of strategy

45717

Source: Forrester Research, Inc.

Figure 2 Critical Mass Scores Potential Site Features On The Value They Provide To Personas




45717

Source: Forrester Research, Inc.

Figure 3 Enlighten Ensured That Personas Were Crafted To Enable Design Decisions



! The new Thornburg Mortgage site includes an image and contact information for the user's mortgage banker on every page. This feature was built to satisfy the varying needs of the three personas below. Richard just wants the details taken care of, Vivian wants to know she can get guidance when she needs it, and Jason wants to become more proactive with his refinancing.



Richard Detweiler

"I didn't invest in this property to create more stress in our lives — just the opposite. I want all of the details taken care of."



Vivian Bell

"Ron and I have stuck to our savings goals and the sale of my business last year gives us the freedom to make some different investment choices. We've wanted to put money into the real estate market for a long time. Now that my son's in New York, we're in a position to do that, and help him at the same time."



Jason Owens

"I haven't thought much about my home loan except to ensure that my payment is made every month, and I might have overlooked my reset date if I hadn't received the reminders. I like the idea of being proactive rather than reactive with my refinancing."

Figure 4 St. Jude Found That It Needed Two Sites To Meet The Needs Of Its Users

The “Partners In Hope” site lets donors see real patients, calculate where their donations go, and make recurring donations — all features catering to the needs of its personas.

The “Eagles for St. Jude” site targeted a golf enthusiast persona with updates on an ongoing fundraising effort connected to the PGA Tour.

45717

Source: Forrester Research, Inc.

- **St. Jude encourages intimacy with a cause.** St. Jude Children’s Research Hospital had years of experience with direct mail, but frequent donors required a robust Web presence to get more information about the hospital. St. Jude partnered with WHITTMANHART to create four personas of existing donors. For three of those personas, St. Jude created the “Partners In Hope” Web site, a site that provided images of real patients, a donation calculator to help them understand where their funds were going, and a video tour of the hospital to help them feel more involved. With the fourth persona, they built a site called “Eagles for St. Jude,” which focuses on the golf fan and ties in with the hospital’s fundraising efforts related to the 2008 PGA Tour (see Figure 4). St. Jude credits its persona effort for helping it become the first nonprofit to create and launch a cultivation site of this scale.

RECOMMENDATIONS

WELL-CRAFTED PERSONAS HELP COMPANIES DESIGN FOR ENGAGEMENT

QVC, Thornburg Mortgage, and St. Jude Children’s Research Hospital were all able to increase customer engagement by focusing their redesign efforts on users’ needs. In order to get similar results from persona projects, customer experience professionals must make sure that personas:

- **Are based on primary research.** To be valid, personas must contain insight into customers’ goals, how they go about accomplishing their goals, the context for their decision-making processes, and their unmet needs and aspirations. These insights can only be gathered by talking to and/or observing customers and prospects, not by sifting through demographic or psychographic data alone. For example, data from a survey won’t reveal that a customer doesn’t actually need to get the best deal on a purchase; he just needs to *feel* like he’s getting the best deal. Firms can incorporate quantitative data to validate and quantify the value of persona behavioral segments, provided they start with the insights gained from qualitative research.³
- **Create empathy for users.** The value of a persona comes from its ability to stop people from designing for the stereotypical “target user” and instead create products and services for real people with real, human wants and needs. It does this by representing the key user attributes — especially goals and patterns of behavior — from thousands or millions of people and portraying these attributes as a vignette about a single composite customer. The richness in detail of a persona, the quote, the “day in the life” story, images, and other details help the designer develop an empathic relationship to the persona and in turn better anticipate the needs and the design aesthetics of the persona and reflect that in the site content, function, navigation, and presentation.
- **Enable design decisions.** To design interactive systems that respond appropriately to user inputs, designers need to know user goals, attitudes, behaviors, and preferences related to their activity — personas provide that information. But personas must provide

an effective interface to the primary research on which they are based in order to be most useful to designers.⁴ For example, knowing that their primary persona logs into her account infrequently and wants to minimize the amount of time she spends managing her money enables designers to prioritize functionality like email password recovery over a fund rebalancing tool.⁵ In addition to the essentials of a persona, the name, age, face, job, and income, look for other factors that make personas useful for design team members. Many Web design agencies include hyperlinks to underlying data, making the information readily available when designers need it.

SUPPLEMENTAL MATERIAL

Companies Interviewed For This Document

Critical Mass

WHITTMANHART

Enlighten

ENDNOTES

- ¹ The marketing funnel is a broken metaphor that overlooks the complexity social media introduces into the buying process. As consumers' trust in traditional media diminishes, marketers need a new approach. We propose engagement, a new metric that includes four components: involvement, interaction, intimacy, and influence. See the August 8, 2007, "[Marketing's New Key Metric: Engagement](#)" report.
- ² In the short time the site has been live, it has had more than 1 million community posts, 200 million community page views, 500,000 product reviews, and more than \$1.4 billion in online revenues.
- ³ Valid personas are based on the direct study of target users, typically taking the form of observational field studies. For these studies, researchers travel to the location where users engage with the channel or product that is being designed — or redesigned. Companies start this process by reviewing current customer segmentation models. Researchers then identify individual users within each segment and go to their homes or offices or to a retail location to observe and interview them as they try to accomplish their goals. See the September 23, 2004, "[Persona Best Practices: Developing Your Customer Research Plan](#)" report.
- ⁴ To gauge the current state of personas, Forrester applied its persona evaluation criteria to reference personas provided by 23 interactive agencies — and only three received passing scores. For each of the six criteria in our methodology, we found significant problems. See the July 19, 2007, "[Best And Worst Of Personas, 2007](#)" report.
- ⁵ Personas enable design teams to prioritize decisions about elements like content, function, and navigation. See the September 10, 2004, "[How To Design Sites That Satisfy Millions Of Users](#)" report.