Marketing Versus Design Personas

Selected Excerpts from a Chapter in the Book *The Persona Lifecycle*

*Quarry* Integrated Communications
About These Chapter Excerpts

In early 2006, Morgan Kaufman will publish a book titled The Persona Lifecycle by authors John Pruitt and Tamara Adlin. This book describes a detailed process for creating and using personas in product design and is illustrated through dozens of examples and case studies from over 60 practitioners in the industry. In addition to these numerous examples, the authors invited Robert Barlow-Busch of Quarry Integrated Communications to contribute a full chapter that explores the relationship of personas to marketing and branding.

This document provides a sample of what you’ll find in Robert’s chapter. In the book, this chapter explores the topic in much greater depth – and illuminates its ideas through graphics, sidebars, and examples from client work.

To learn more about the book, find it on Amazon.com or visit its website at:

http://www.personalifecycle.com

This work comprises a chapter in the book The Persona Lifecycle: Keeping People in Mind Throughout Product Design by John Pruitt and Tamara Adlin, published by Morgan Kaufmann. Copyright © 2005 Elsevier. All rights reserved. www.mkp.com

Interested in learning more about the ideas in this chapter? Please contact:

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Personas always have one foot in the world of marketing

Before going any further, let’s clarify what’s meant by this term “marketing”, beyond simply claiming that it’s about customers. Marketing is a discipline that analyzes customers, competitors, and industry trends to create an overall understanding of a marketplace. This understanding then fuels two primary activities: strategy and communications.

Marketing strategy answers the question of “how do we maximize our ability to compete successfully and generate revenue?” It identifies the most profitable groups of customers for your products or services (through a process called segmentation) and formulates a plan for how to understand yourself in relation to the competition (called positioning).

With a strategy in place, marketing shifts into its other primary activity: communications. The strategy comes to life through a host of communications tactics such as advertising, public relations, Website content, consumer or trade shows, publications, and so on.

Although the use of personas in product design is still relatively new, personas may at first glance look strangely familiar to people in marketing: over the years, marketers have developed an extensive library of methods and tools, some of which involve creating customer profiles that echo the form of personas. Indeed, the personas we create for product design share a common basis — both practically and ideologically — with some central ideas in marketing. So even if we intend them to act in a purely design-related role, personas always have one foot in the marketing world.

**Personas are a form of segmentation**

Segmentation is the process of breaking down the universe of potential customers into smaller, meaningful, more useful chunks. Any discussion of marketing invariably leads to, or springs from, questions of segmentation. A segmentation model forms the very
underpinning of marketing strategy and communications, as it provides the means by which you identify customers, even prescribing the language by which you refer to them.

That’s exactly what a persona does for designers.

So when you show off your personas to the folks in marketing, they see you waving yet another segmentation model. Generally speaking, this will not win you a round of cheers and hearty congratulations: the selection of a segmentation model is a critical step in the formulation of a marketing strategy and is a decision not made — nor changed — lightly.

The good news is that, although personas are a form of segmentation, they need not sit in opposition to market segments. Design personas divide the market according to people’s goals and behaviors in the specific context of using a product; marketing usually segments along different dimensions and is traditionally concerned with predicting behaviors in the context of purchasing a product.

A place for personas in today’s marketing revolution

Traditional theories of marketing are based on a broadcast model of communication, meaning organizations decide upon a “message” that will persuade “targets” to buy their product. Today, these ideas about marketing are changing. Our cultural values have shifted, we’ve developed a healthy skepticism of advertising, our access and sensitivity to information has increased — in the end, as consumers, we’ve become tough nuts to crack. Consequently, a movement is afoot to discard the broadcast model in favor of a dialog model. Successful companies now worry about how to build meaningful relationships with their customers, not how to hit them with a message in the hopes of persuading them to make a purchase.

Where traditional approaches to marketing were largely analytical, rational, and product-oriented, the approaches required for marketing customer experiences are decidedly more people-oriented and emotional. This makes personas a potentially attractive tool for
marketing, as their rich descriptions are useful in guiding decisions. Let’s explore some related trends that present further opportunities for personas to play a role in your organization’s marketing efforts, namely:

- An increased desire for customer intimacy
- A need for richer descriptions of customers
- An increasingly collaborative environment

**Flexing your design personas’ muscles for marketing purposes**

If you’ve gone to the effort of creating personas to guide design, then extract as much value from them as possible and introduce them to your marketing team. At Quarry, we frequently offer our design personas a seat at the marketing table because they contain insights into whether we’re building the right product, into the competitive landscape, and into the question of how best to promote the product to our customers.

**Check your requirements: Are you building the right product?**

It’s never too late for your personas to play a role in influencing a product’s requirements, though it’s clearly better for them to appear early in the process — especially if they suggest that a change in strategy may be appropriate. So whenever possible, create your design personas before the requirements process is complete. And encourage them to speak up as early as possible!

**Scan the competitive landscape: Where do you sit?**

In the course of creating personas, you’ve undoubtedly uncovered insights into how people compare you to the competition. While demonstrating how your product fits into their workday, perhaps someone commented on a different product they used in a previous
job; perhaps someone else told a story about their friend who works at another company loyal to your competition; or perhaps you’ve heard comments that speak directly to your own sense of what makes you competitive.

This information often doesn’t make it into the text of a design persona. Marketing activities might benefit from this information, though, so take another look through your collection of research notes and observations. Share them with your marketing team, in addition to the personas themselves.

**Plan your messaging strategy: What will grab your customer’s attention?**

Your design personas contain two types of information that are particularly helpful in identifying what messages will grab the attention of potential customers:

- **What are people’s goals?** You can describe how the product helps them reach those goals.
- **What are people’s burning needs?** You can describe how the product eliminates the painful problems they face currently.

**Building your brand with help from personas**

The experience that customers have when using your products can have a tremendous impact on the meaning of your brand in their minds — in fact, this usage is arguably the most impactful experience that customers will have with your brand. If marketing and advertising are where the promise of your brand is *made*, then product development is where the promise is *kept*. So here’s the call to action. Whether you’re a usability specialist, an interaction designer, an information architect, a technical writer, a developer, a product manager, or whatever — there’s always something that you can do to help build your brand through your product or website.
For example, one of our clients was a national provider of financial services for farmers. Embarking on a redesign of their website, we learned that, although people were satisfied with its usability, they clearly felt that something was not quite right. We tried a projective exercise to help identify the root of the problem, asking customers the question:

“If this organization was a car, what kind of car would it be?”

Not surprisingly, we heard descriptions of well-used and -maintained pickup trucks. But when we asked the same question about the website itself, people described it as a new, clean, feature-loaded SUV or luxury sedan. One participant in a usability test finally identified the core issue by observing, “this website feels like it could belong to any Wall Street bank, not to an organization that I know lives and breathes our business out in the countryside.” The website didn’t support the meaning of the brand as understood by customers. So we helped our client adjust the site’s information architecture, behavior, and visual treatment to support their brand more appropriately.

**The Brand Ladder: Connecting personas, products, and brand**

In designing for brand, the ideas, feelings, and attributes that you’re trying to evoke are often abstract, but the building blocks at your disposal are concrete. The challenge lies in figuring out how to devise your product’s features, functions, architecture, behavior, content, and visuals to create a feeling of “comfort”, “finesse”, “optimization”, or “connecting”, for example.

To help with this challenge, we employ a heuristic tool called the *brand ladder*. Though originally intended to assist with strategy for marketing communications, the brand ladder can help to explore how a website could reinforce the attributes of a brand, or how a software application might fulfill the high-level goals of its personas. The brand ladder doesn’t generate answers; that’s still up to you. But it structures your thinking around how to make meaningful connections between product features and brand or customer values.
What is a brand ladder?

A brand ladder is quite simply a model that shows the relationship between features, benefits, and values. It looks like this:

<table>
<thead>
<tr>
<th>Values</th>
<th>A selection of attributes inherent to the brand or goals held by customers.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Benefit</td>
<td>An implicit or explicit benefit that supports the customer’s pursuit of their goals.</td>
</tr>
<tr>
<td>Product Benefit</td>
<td>An implicit or explicit benefit offered by the product.</td>
</tr>
<tr>
<td>Feature</td>
<td>An objectively observable function, detail, attribute, or quality of the product.</td>
</tr>
</tbody>
</table>

The relationship between rungs on the ladder is established by asking, “Why is that important?” as we look up the ladder and “What’s the basis for that?” as we look down. Here’s an example that illustrates the thinking behind an advertisement from Michelin Tires, in which they show a baby sitting inside an empty car tire.

<table>
<thead>
<tr>
<th>Values</th>
<th>Be a good parent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Benefit</td>
<td>Safety</td>
</tr>
<tr>
<td>Product Benefit</td>
<td>Improved traction</td>
</tr>
<tr>
<td>Feature</td>
<td>Shape of the tire’s tread blocks</td>
</tr>
</tbody>
</table>
The brand ladder tells a kind of story as you read it up or down. A successful brand ladder “hangs together” in that its selections at any level connect meaningfully with the other selections. Your personas, and particularly their goals, will contain insights to help populate the top half of a brand ladder — minimally the “customer benefit” rung, but usually the “values” rung as well. But the real benefits come when you ask:

“What values are shared by our customer AND our brand?”

These intersections, when you find them, provide exciting opportunities. Your customers will feel great about using your product; you’ll feel great about building it. And you’ll increase your organization’s competitive edge, too.

**Conclusion**

Both designers and marketers face a growing need for rich, multi-dimensional tools for getting to know customers more intimately. Personas have some noticeable advantages over traditional methods, as their faces and stories remind us that we’re selling to real people, not nameless “targets”. They can play an active role in shaping not only a product’s behavior, but the very relationship of its customers to the brand.

As we’ve seen, personas can’t help but cross the line into marketing — even if we never intend them to. But although this relationship is sometimes uneasy, both design and marketing personas can be valuable additions to the toolbox of anyone in pursuit of delivering a great customer experience.
Want to Learn More?

Please get in touch if you’d like to learn more about personas for design or marketing! Call, email, or visit our website for additional resources about using personas.

http://personas.quarry.com

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