Playing with Personas for Better Products

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Portions of this slide deck are drawn from the SAFe® Certified Agile Product and Solution Management course
Session Objectives

At the end of this session, you should be able to:

- Understand Market Segments
- Understand Personas
- Create Personas
- Integrate Personas into Agile Development practices
Let’s Try it Out
You’re working as a Product Manager at the Terrific Transport Corporation working in the Autonomous Delivery Vehicle Business Unit.

Please watch this company background video, where Anthea Bowen, CEO of TTC, provides the history and future direction of the company.

Click to here to play video http://bit.ly/2GGDpWc
What features should we build?

Working as a team, purchase the features you think would help TTC move from the commercial autonomous delivery vehicle market.

Online? Go to: https://weave.conteneo.co/
Click “Join Forum”

Table 1: 557-825-660
Table 2: 558-112-421
Table 3: 558-399-184

Table 4: 558-685-949
Table 5: 558-972-716
Table 6: 559-259-485
Discussion
Before Personas we have market segments
Market segmentation is the process of dividing a potential market into distinct subsets (called segments) with common needs or characteristics in order to focus effort on the most attractive segment. Segments are:

<table>
<thead>
<tr>
<th>Identifiable</th>
<th>We can identify its members</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measurable</td>
<td>We can determine its size</td>
</tr>
<tr>
<td>Significant</td>
<td>It is large enough to be economically feasible</td>
</tr>
<tr>
<td>Homogenous</td>
<td>Members within a segment are similar</td>
</tr>
<tr>
<td>Heterogenous</td>
<td>Members between segments are distinct</td>
</tr>
<tr>
<td>Reachable</td>
<td>Contacted through promotion and distribution efforts</td>
</tr>
<tr>
<td>Compatible</td>
<td>Aligned with our mission, strengths, ability</td>
</tr>
</tbody>
</table>
Attributes help create market segments

- Some attributes depend on market type:
  - **B2B**: Vertical industry, operating characteristics, firm size, firm structure, revenue, number of employees, rate of change (growing?)
  - **B2P/B2C**: Behavioral/lifestyle, personality, geography, demography (age, gender), rate of change (growing?)

- Multiple attributes are used to create attractive segments and encourage focus
A Job to be Done (JTBD) is not a product, service, or a specific solution; it's the higher purpose for which customers buy products, services, and solutions.

Clarity in understanding JTBD helps:

- Create market segments of customers facing similar problems
- Improve the design of operational value streams and customer experiences
- Create opportunities for innovation when we find entirely new ways to solve a problem (e.g., the job of ingesting medicine can be accomplished by taking a pill or by applying a skin patch)
Use different attributes to explore markets in fresh ways

Knowledge of Security
- Very Strong: 4%
- Strong: 6%
- Average: 15%
- Weak: 35%

Experience
- 1 year or less: 20%
- 1 - 2 years: 40%
- 2+ years: 30%
- 3+ years: 10%
Understand Total Available Market (TAM) and Segments

The **attractiveness** of a segment is based on analyzing the segment’s needs and the degree to which your products can profitably meet these needs.

**Total Available Market (TAM)**
*Less than 25 miles, less than 100lbs*

**Known Universe**
All companies who use a courier

**Segment 1: Medical**
Medical diagnostics

**Segment 2: Retail and Printing**
Retail goods/printed documents
TTC has a compelling market opportunity

The market will be **ACCELERATING** growing at a **CAGR** of more than 5%.

**INCREMENTAL GROWTH**

- **$22.4 mn**
- 2019
- 2023

The year-over-year growth rate for **2019** is estimated at **5.04%**.

The market is **HIGHLY FRAGMENTED** with many players occupying the market share.

**GROUND DELIVERY SEGMENT** accounted for 68% market share in 2018.

One of the **KEY DRIVERS** for this market will be the increasing demand from medical and healthcare industries.

**READ THE REPORT:**

**COURIER AND LOCAL DELIVERY SERVICES MARKET IN US 2019-2023**

**10,000+** reports covering niche topics

**INDUSTRIALS**

Read them at: [www.technavio.com](http://www.technavio.com)
### Local courier services market segmentation (U.S.)

<table>
<thead>
<tr>
<th>Segment</th>
<th>Core Need/Job</th>
<th>Competitors</th>
<th>2021 Est. Spend (US, M)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical Services</td>
<td>Secure, sometimes urgent transport of medical specimens for testing/diagnostics</td>
<td>Cars, van, bikes</td>
<td>$2,000</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>Reliable transport of goods and services, often related to Just-In-Time Manufacturing</td>
<td>Vans, small trucks</td>
<td>$5,000</td>
</tr>
<tr>
<td>Retail and Printing</td>
<td>On-demand delivery of retail goods or printed documents</td>
<td>Bikes, cars</td>
<td>$1,000</td>
</tr>
<tr>
<td>Food Delivery</td>
<td>On-demand delivery of prepared (mostly hot) food</td>
<td>UberEats, DoorDash, GrubHub</td>
<td>$23,000</td>
</tr>
<tr>
<td>Special needs</td>
<td>On-demand delivery of specialized items (such as luggage or artwork). Security is a priority</td>
<td>Specialized vendors</td>
<td>$4,000</td>
</tr>
</tbody>
</table>
Describe the purpose and use of personas
Understand personas

Personas are fictional characters based upon your research. They represent the different people who might use your product or solution in a similar way.

- Conveys the problems they’re facing in context (e.g., their work environment) and key triggers for using the product

- Captures rich, concise information (photographs, family stories, jobs, etc.) that inspire great products without unnecessary details
Example persona: TTC Consumer

Cary the Consumer

Age: 36
Location: Reno, Nevada, USA
Time in App: 10 minutes

“I’m a working dad with three children ages 3, 6, and 10. I’m also in a band, which means I want to spend as much time with my kids and my band. I need my package delivered on time so that I can maximize time with my family.”

| I like technology! I have iPhone, iPad, and a nice home Wi-Fi setup | I’m not home on some weekends | I’d rather order online than dial the phone and talk to somebody |
| My wife also works during the week, so she doesn’t have much spare time to help | Text is my favorite form of communication with suppliers | I don’t own a computer, only tablets and phones |
Personas refine market segments

- Bring segments to life
- Personalize the experience to meet individual customer needs
- Get the segments right first, then build personas that support them
Personas are strategic, longer lived artifacts that define product direction.

<table>
<thead>
<tr>
<th>Benefit Hypothesis</th>
<th>Feature</th>
</tr>
</thead>
<tbody>
<tr>
<td>24/7 access</td>
<td>iPhone app for tracking order status</td>
</tr>
<tr>
<td>Ability to receive packages without being home</td>
<td>Secure package delivery/ability to designate delivery to a neighbor</td>
</tr>
<tr>
<td>Packages delivered where I want, even if I change my mind</td>
<td>Rerouting packages in transit</td>
</tr>
</tbody>
</table>

Normally, we talk about ‘Feature-Benefit’. But in design thinking, it often helps to flip the ordering and talk ‘Benefit-Feature’ as this helps promote considering different features that can provide the desired benefit.
Complex products often have 3 to 7 **user** personas

<table>
<thead>
<tr>
<th>Type of Persona</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary</td>
<td>The personas that <strong>must</strong> be satisfied for a successful product. Their goals <strong>drive</strong> the design process. There are typically 1 – 4 primary personas.</td>
</tr>
<tr>
<td>Secondary</td>
<td>Another user of the primary interface, one for whom we will make accommodations so long as the primary persona’s experience is not compromised. There are typically 1 – 3 secondary personas.</td>
</tr>
<tr>
<td>Negative</td>
<td>Someone for whom you’re explicitly <strong>not</strong> going to satisfy. This helps you make tough choices about product features and is used rarely. Focus on your primary and secondary personas.</td>
</tr>
</tbody>
</table>
Create buyer personas for B2B markets

- In many B2B markets, buyers make the purchasing decisions, not the end users.
- Buyer personas capture their role, authority and buying journey
- Buyer personas reveal insights about buyers’ decisions—the specific attitudes, concerns, and criteria that drive prospective customers to choose our solution, a competitor, or the status quo
- Buyer personas help drive often-overlooked aspects of the product: buyers care about ROI, economic modeling, service, and support
How to create and use personas
Use many artifacts to develop personas

- Case Studies
- Macro-economic Trends
- Market Segments
- Win/Loss
- Product Vision

**TTC Personas**

**Cary the Consumer**

- **Age:** 36
- **Location:** Reno NV
- **Time In App:** 10 minutes

"I'm a working dad with three children ages 3, 6, and 10. I'm also in a band, which means I want to spend as much time with my kids and my band. I need my package delivered on time so that I can maximize time with my family."

<table>
<thead>
<tr>
<th>I like technology</th>
<th>Have iPhone, iPad and a sweet home WiFi setup</th>
<th>I'm not home on weekends</th>
<th>I'd rather order online than dial the phone and talk to somebody</th>
</tr>
</thead>
<tbody>
<tr>
<td>My wife also works during the week, so she doesn't have much time to spare to help</td>
<td>Text is my favorite form of communication with suppliers</td>
<td>I don't own a computer, only tablets and phones</td>
<td></td>
</tr>
</tbody>
</table>

**Product Box**

**Prune the Product Tree**

**Qualitative Research**

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Persona development best practices

- Persona formats may differ based on product and solution context.

- Personas create options for communicating objectives and requirements (persona-specific stories):
  - **Role:** As a <user role> I can <activity/goal> so that <business value>.
  - **Persona:** Frank wants to <activity/goal> so that Frank gets <value>.

- Personas are not roles—a user may have multiple roles.

- Periodically assess your personas as your product evolves.
Persona templates can help you create personas

- There are many persona templates and resources available
- The trick is to find an approach that provides "just enough" detail to help you accomplish your goals
Create a Persona for your current product or service

Select a persona canvas/template that aligns with your current product or service and build a persona. If you’re a consultant, build a persona that represents your most common client.

Don’t stress! This is a conference workshop!
Create a fast persona now and a better one when you get back home!
Discussion
More ways use personas
How can you leverage personas?

Working at your table, explore how you can leverage personas in SAFe:
Personas can be leveraged throughout SAFe

Have we considered Cary’s needs in our Solution Context (this is part of our next lesson)?

Cary the Consumer

Does the Program Backlog relate to Cary’s needs?

Do PI Objectives relate to Cary’s Objectives?

Do we refer to Cary during Iteration Planning?
Role-playing with personas brings them to life

1. Dev Team members pick a persona
   - Cary the Consumer
   - Mary the Merchant

2. Dev Team plays *Buy a Feature*: “What would this persona want?”

3. Review the results:
   - What did they fund?
   - Why do they think these Features are important to this persona?
   - What new ideas emerged on helping the persona accomplish their goals?
Q&A
Personas We’re Using
Room Setup

- Round Tables
- 80 People: 6 participants / table + 1 facilitator → 15 tables
- Online: 7 people, plus handouts
- Essential / light persona – fully dressed persona
- 30: Part one, trying it out
  - 05: Introduction, video overview
  - 20: speed play of Buy a Feature
  - 05: review
- 20: Market Segments & Personas
- 20: Part two: What personas are and how to create one, speed create one for a case study
- 20: Part three: Exploring ways to use Personas:
  - Show the TTC umbrella video

PRINTING
- File: Personas for Handouts. Print 10 copies. COLOR, Single-sided, 8.5x11
- File: Write-In Candidate. Print 2 for each table.

For any file that is not pre-sized to 11x14 or 11x17, please scale ALL printing to the sizes specified above.
Cary the Consumer

Age: 36
Location: Reno, Nevada, USA

“I’m a working dad with three children ages 3, 6, and 10. I’m also in a band, which means I want to spend as much time as possible with my kids and my band. I need my package delivered on time so that I can maximize time with my family.”

| I like technology! I have iPhone, iPad, and a nice home Wi-Fi setup | I’m not home on some weekends | I’d rather order online than dial the phone and talk to somebody |
| My wife also works during the week, so she doesn’t have much spare time to help | Text is my favorite form of communication with suppliers | I don’t own a computer, only tablets and phones |
Mary the Merchant

Age: 35
Location: Sacramento, CA

"I love travel and hiking so much that I decided to open a store that focuses on selling travel clothing and accessories. I have a high bar for quality in my life, as well as in my work. I spend most of my time in my retail store. Unfortunately, my attention to detail means I spend too much time in the back office managing operations."

| I carry my MacBook Pro everywhere so that I can order real-time. My iPhone is my backup | I'm always looking to see how I can better manage the my merchandise so that I can get more online and store sales | I exercise every day, sometimes twice a day |
| I often work on weekends to ensure we have a 24/7 presence | I admire people with children, although, I'm never going to be one | I have a small dog and a cat, and they are the loves of my life |
Deborah the Hospital CIO

Age: 54
Location: Phoenix, AZ
Credentials: M.D., Ph.D. in Clinical Dermatology, M.B.A in Information Science

“I was the Head of Dermatology when I became interested in data-based research. Based on my successful applications of IT in research I was asked to lead the implementation of our Electronic Health Record initiative. When our acting CIO announced his retirement, I was asked to become CIO and continue to find ways to automate operations”.

<table>
<thead>
<tr>
<th>I need to identify ways in which we can continue to cut costs while increasing positive patient outcomes.</th>
<th>I’m on call 24x7.</th>
<th>While I no longer maintain an active medical practice, I read journals and try to remain current in my field.</th>
</tr>
</thead>
<tbody>
<tr>
<td>I’m divorced, with two children in college.</td>
<td>One of my biggest challenge is the proliferation of tablets and phones and BYOD.</td>
<td>The hospital board is conservative. I can experiment with technology but it needs to be stable.</td>
</tr>
</tbody>
</table>
Ben the College Football Player

Age: 20
Location: Boston, MA
Studying: Political Science

“I’m a college football player – but I’m no dumb jock. I know I’m not going to make it as a professional football player. I play because I like playing football! I also like the teamwork as I think it will help me prepare for my dream job: I want to return to my home town and eventually become the mayor, working to improve our school system.”

<table>
<thead>
<tr>
<th>I grew up on a medium sized town of about 80K people. We had two high schools and it was FUN!</th>
<th>It is really hard to be a student athlete. I have to really be careful about how I spend my time.</th>
<th>I was good enough to make it on the football team, but not good enough for a scholarship.</th>
</tr>
</thead>
<tbody>
<tr>
<td>I use Instagram, Discord and twitch.</td>
<td>I eat. A lot.</td>
<td>I have a credit card. I made some dumb choices and I’m trying to not use it anymore.</td>
</tr>
</tbody>
</table>
Sandra the Office Manager

<table>
<thead>
<tr>
<th>Age:</th>
<th>23</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location:</td>
<td>Chicago, IL</td>
</tr>
<tr>
<td>Degree:</td>
<td>Hotel Management</td>
</tr>
</tbody>
</table>

“I got a degree in Hotel Management, but I couldn’t find a job, so I decided to take over as the Office Manager of a small outdoor landscaping and construction firm. This place is a wreck! There are no procedures, the files are all over the place. I’ve got works on sites who are spending money whenever they need a new tool or delivery of materials. I’m overwhelmed!”

| My dad ran his own gas station, so I know small business owners are critical to our economy. | My dad seemed so much more organized. Sure, it was a gas station, but he kept it clean! | I thought my degree would prepare me more thoroughly for my job. I wasn’t ready for the chaos. |
| I’m working about 9 hours a day, but I still find time to keep going to my Soul Cycle® class. | I have a steady boyfriend. We’re not ready to get married… yet. | I like my co-workers and I want to help them when they are on a jobsite. |