



# THE 3 MAIN TYPES OF PERSONAS AND HOW TO CREATE THEM

BUYER, WEBSITE, AND USER PERSONAS THAT DRIVE REAL RESULTS

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One of the biggest mistakes marketing and advertising professionals make is the same mistake any writer is prone to:

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## **Assuming what you want to say is what everyone wants to hear**

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It may sound harsh, but the reality of marketing is most people only care about you in the context of their needs. So as marketers and advertisers, we must take the time to understand what our audience wants to hear, not what we want to say. An important first step to this is creating “personas” of our potential audience.

# WHAT ARE PERSONAS

Personas are essentially invented people who represent the different mindsets, motivations, and behavior patterns of all your various audience segments. Personas are similar to archetypes in that they are fictional representations of a larger whole, but they are less symbolic and much more detailed.

Developed through research, data, interviews, and educated speculation, personas are meant to guide the decisions you make about designing and marketing your products or services. They are an excellent point of reference when you're writing marketing materials or re-designing a website and you notice yourself veering away from your original goals, singing your own praises too much, or bickering about the details. Just go back to your agreed-upon set of personas and say, "Ok, let's put aside what we think for a second, and consider what they would say about this."

# 3 MAIN TYPES OF PERSONAS

Most people, when they think of personas, think of buyer personas. However, there are at least 3 distinct types:



**Buyer personas** represent your target customers. They are the people involved in the decision to purchase your products or services. Having the clearest link to revenue, they play the biggest role in driving marketing strategy and messaging.



**Website personas** represent all the people your website is meant to serve. They include critical behavioral and UX considerations that should guide website design, as well as important audiences not accounted for in your buyer personas (existing customers, your customers' clients, investors, potential employees, the media, etc.).



**User personas** represent the individuals who will use your product, regardless of whether they have any influence over the purchasing decision. These personas may be used to guide product design, as well as messaging about product benefits — and they are often different from buyer personas. For example: Whereas a CIO might be the “buyer” making the decision to purchase a certain software, IT managers will be the ones implementing it, and regular employees will be actually using it (and are thus both included in user personas).

	Represent...	Critical for...	Includes...
Buyer Personas	Your target customers	Marketing strategy and messaging; sales enablement	Any person who can influence the decision to buy your product, from recommender and initial researcher, to final approver
Website Personas	Your website visitors	Website design, content, and architecture	All important website visitors, including prospective customers, existing customers, your customers' clients, investors, potential employees, the media, etc.
User Personas	Your product users	Product design; benefit messaging; support enablement	Implementers, installers, maintainers, and all other people using your product

# 3 KEYS TO CREATING EFFECTIVE PERSONAS

## 1. Personas should be defined by behavior

There are 2 big mistakes people often make when segmenting personas:

### SEGMENTING BY TITLE

A person's title usually doesn't define how they behave. An IT Manager and Systems Architect might behave in the exact same way. If you create additional personas just to account for titles, you'll easily end up with more than 20 redundant personas.

Two people with the same title might also behave in completely different ways. Many risk-averse CIOs with backgrounds in finance worry about keeping costs down and need to see the business benefits for any solution. However, plenty of CIOs are also innovators who see new technology as the key to growth and really want to know about the technical details.

### SEGMENTING BY DEMOGRAPHIC

Same as with segmenting by title, segmenting by demographic (recent college graduate, middle-aged female, affluent older male) can force you to create dozens of different personas that don't necessarily behave differently. It will also be very difficult for you to define the "typical" behavior for any one of those demographic segments, because it can vary.

So start by looking for patterns and themes across your audiences. Pinpoint shared mindsets (core sets of beliefs and behaviors that tie people together). Focus on characteristics that tell you how to persuade a buyer, provide an optimal online experience, or design a product in the best possible way. Consider demographics, but only in terms of how they are relevant within each of your behavior-based personas.

**Less is more: only create another persona if it represents a type of behavior that is significantly different from your other personas.**

### 3 KEYS TO CREATING EFFECTIVE PERSONAS

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## 2. Research and interviews are crucial

Creating effective personas is four parts research, six parts interviews, and one part educated guessing.

The first thing to do when you start on a set of personas is go online. There are hundreds of studies on mobile workers that will tell you about their preferences, for example. There is a ton of information already out there if you're willing to look for it. As for everything else: it comes down to interviews.

Interviews and user testing are absolutely invaluable. We know this might come as a shock to some of you, but there is only so much relevant information you can gather online. When it comes to a specific product, service, or website, nothing is as valuable as interviewing the people actually using it.

In the case of website or user personas, these "interviews" also must include user testing. That's because it's very difficult for most people to relay all the usability issues they're having out of context (or sometimes even know that they're having issues) — but it's something you can easily discover when you observe people using the website or product.

Considerations for conducting successful interviews:



### When interviewing buyers...

- + If possible, speak to people who didn't pick you. Buyers who didn't choose your solution are actually the most likely to be willing to talk to you, because something must have displeased them, and people love to complain. They are also more likely to have valuable input, because they usually won't just say, "Everything was great!"
- + Interview buyers as soon as possible after their purchase, because their implementation experience will quickly overshadow their buying experience.
- + Ask specific questions that don't have obvious answers. This is about gathering information you wouldn't be able to discover any other way.
- + Delve into why someone decided to look for your product or visit your website. What was the trigger for them? What was the business problem they were trying to solve, and how?
- + Talk about any competitors the interviewee might have looked into. Why did they, or didn't they, choose you? What were the main factors that influenced their decision?
- + At the end of the day, what ultimately defines success for your buyer? Reducing costs? Boosting productivity? Getting a promotion?

## 3 KEYS TO CREATING EFFECTIVE PERSONAS

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### When interviewing website or product users...

- + Ask if there are there any other websites or interfaces your interviewees admire and why. If nothing else, it will get them thinking in the right direction when it comes to what they want to see from an interface.
- + Delve into the types of tasks that are most important for your users to be able to accomplish. Buying something online? Integrating an application into a complicated existing ecosystem? (Then when you're testing users, observe them completing these tasks.)
- + Talk about any issues they might remember having in the past. How did they solve these? What could have made that experience better?
- + Ask users about any changes or new features they'd like to see. Most people can easily come up with a "wish list," especially if you ask them about specific parts of the website or product.

### Quality and quantity both matter

Of course you want to talk to responsive individuals who have something to contribute to your research. However, you also won't know if someone represents a "typical" buyer or user until you talk to more people just like him or her. If a behavioral pattern is the crucial element that defines a persona — you need to talk to enough people to actually be able to see patterns. If you only talk to a handful of individuals, you run the risk of using behavioral anomalies as a reference point.

## 3 KEYS TO CREATING EFFECTIVE PERSONAS

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### 3. Know how you will apply your personas

Don't create personas just because you think you should — always have a plan for how you will use them. The chart on page 4 of this paper is a good place to start when determining how to apply each of the three different types of personas. Here are some additional considerations:



#### FOR BUYER PERSONAS:

Create a messaging matrix once you're done with your buyer personas. The purpose of this matrix is to guide sales and marketing in how they should talk to each one of your audience segments (or personas). A Business Decision Maker, for example, first wants to know about the high-level business benefits of your solution — not the technical details. That should come through in your email marketing, social media, content strategy, sales conversations, etc.



#### FOR WEBSITE PERSONAS:

Construct user paths and assign desired actions for each of your personas. By assigning actions to each persona, you can take a conversion-focused approach to website architecture and design. Knowing the ultimate destination for each persona is critical to designing the path to get there. This can then guide the layout of the specific pages along that path (what the main call-to-action should be, for example). And after every iteration, take a step back, look at what you've done, and ask whether it meets the needs of all the relevant personas.



#### FOR USER PERSONAS:

Use these personas to create checklists for your product development and user experience (UX) teams. These checklists should include current issues that need to be addressed, as well as features or capabilities that should be created in the future — in order of priority.

# 6 STEPS OF THE PERSONA BUILDING PROCESS

1

## ONLINE RESEARCH

Start by getting as familiar as you can with the subject matter, the industry, and the competitive landscape. And if you know anything about the buyer/user base, you can also start looking for any behavioral information on that audience.

2

## INTERNAL INTERVIEWS

Talk to internal stakeholders within your company (or your client's company). What insights do they have on your target audiences? Who do they think you should be targeting that you aren't already? What are their expectations/needs from these personas? For example, if you're creating user personas, support teams are a great resource for discovering broad patterns around usability issues. And for buyer personas, sales teams might be able to tell you what works and doesn't work right now.

3

## EXTERNAL INTERVIEWS AND USER TESTING

As described in the previous section, make sure to conduct interviews with actual buyers and users, as well as usability testing for the latter.

4

## PERSONA DEFINITION

After you collect all your information, look for behavioral patterns and defining personas based on those patterns. Aim for a set of 4-5 personas.

5

## PERSONA CREATION (AND MORE ONLINE RESEARCH)

Once you have defined your personas, start building them out. The next section gives examples of the various types of information you could include.

6

## PLAN FOR USAGE

As described in the previous section, build a plan for how you will use these personas. Communicate that plan throughout the relevant teams within your company — or explain to your client how to communicate this throughout their company.

# SO WHAT DOES A PERSONA LOOK LIKE?

A quick Google search would reveal hundreds of different formats in which personas can be presented. And there's really no one right way. Here are just some of the elements you might want to consider including, although not all of them will apply to every type of persona:

## General

- + **Persona title** - Define your audience segment with a behavior-based title like "Mobile Worker" or "Technical Checklist Evaluator."
- + **Background** - Give more information on someone's education or previous employment if it is relevant to how this audience behaves.
- + **Fictitious name, photo, title, company** - Bring your persona to life with some basic personal details, but don't spend too much time here. These things will probably be irrelevant to any decisions you make, but they will help make the personas less abstract.
- + **Motivations and goals (the "why")** - What drives this type of person at the end of the day, as well as at the end of the year? Is it to become as good as possible at his/her job? To inspire others? To make sure all IT systems are running perfectly? To be promoted?
- + **Demographics** - Assign your persona an age, gender, income, and any other characteristic that is representative of this segment. However, if any of these qualities are completely irrelevant, you may want to exclude them, so as not to give them more importance than needed.
- + **Usage** - If it's relevant, mention the types of devices, operating systems, social platforms, or other technologies this person is most likely to be using. It may also be beneficial to go into the types of websites this person frequents or publications he or she reads.

## SO WHAT DOES A PERSONA LOOK LIKE?

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### For Buyer Personas



- + **Decision-making role** - Where does this person fit in within the overall decision-making process? Is this the head honcho who has the final say, or someone who will have to eventually justify costs to others?
- + **Triggers** - What makes this person start caring about this particular product or service? Is (s)he running into a specific issue, or did his/her boss say to go look at your solution?
- + **Decision criteria** - What does this person care about when it comes to making a purchasing decision? Is it a specific feature? Improving employee productivity? Cutting costs?
- + **Information consumption preferences** - What will be of most interest to this person and have the biggest effect on their decision? Is it a product demo, testimonial, case study, or a one-on-one conversation? Does (s)he prefer to scan a website, read a long paper, or watch a video?
- + **Barriers and objections** - What are the main objections this person might have when it comes to purchasing your product or service? Is it cost? Complexity? Integration issues?
- + **Your elevator pitch** - Considering all of the above, what is your elevator pitch to this audience segment? How can you best help him/her solve important challenges and achieve major goals?

### For Website & User Personas



- + **Responsibilities** - When it comes to using your website or product, is this person responsible for any of the results? Who are they accountable to?
- + **Interaction frequency** - When and why does this person interact with the website or product? Does (s)he log in every day, or only when an issue arises? Does (s)he come to the website once a week, or once a year?
- + **Tasks** - What types of things does this person need to accomplish with your website or product?
- + **Obstacles and frustrations** - What types of issues is this person probably having with the website or product? Is it too confusing? Too slow? Too difficult to find something?
- + **Enhancement needs and preferences** - What changes or new features would this person like to see in your website or product? What would be most helpful in enabling this persona to achieve his or her goals?
- + **User paths** - Depict a typical/ideal user path to help visualize how this person interacts with the website or interface (see example at the end of this paper).

# PARTING ADVICE

The purpose of any type of persona is to create personifications of specific behavioral patterns that are grounded in reality. But how general is a behavioral pattern? And how detailed should the reality be? It can be difficult to find the right balance between including too much and too little information.

## **DON'T GET TOO HIGH-LEVEL**

Any persona that tries to do it all will be too high-level and unfocused for real impact. If you notice this happening, segment a persona into additional ones that are more focused.

## **DON'T GET LOST IN THE WEEDS**

You can easily end up going too deep if you try to summarize every single one of your observations and findings. You don't need to mention every single consideration and feature.

In the previous section, we listed out a lot of different pieces of information you could include in your personas. However, if any of those details are irrelevant to how your audience behaves or what the purpose of the persona is, don't include them. The following example should give you a better idea of the type and amount of information you should aim for.

# EXAMPLE PERSONA

Here is an example of a B2B website persona I created as part of a website re-design project for a client at Faction Media:



## TECHNICAL SHORTLIST EVALUATOR

BEN JONES

Lead Systems Architect, Cablevision of CT

AGE: 43

LOCATION: SHELTON, CT

5 years in current position

Married, 2 children

MS, Computer Science, Columbia University

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**“I will be accountable for deploying and managing this solution, so I need to make sure I select the one that will integrate with our current ecosystem and meet all our requirements.”**

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## ABOUT BEN

Organized and precise, Ben focuses on detail in everything he does, designing and building components of applications to the latest standards and providing consultative guidance on all projects. He is responsible for ensuring that the architecture of the delivered solution is not only technologically sound, but also matches business and customer requirements.

Ben is very skilled at coming up with solutions for complex problems and is constantly faced with cycles of redesign and re-evaluation. He has an uncanny drive for results and enjoys working hard. He seizes more opportunities than most of his peers and steadfastly pushes himself and others.

## BEHAVIORAL CONSIDERATIONS

- + First and foremost, looks for technical specifications, integration kits, and brief product feature lists
- + Needs to be confident this solution will fit all his technical requirements and integrate well with existing systems
- + Is interested in the latest thought leadership resources on this industry topic
- + Needs to be able to quickly gauge differences across competitors
- + Wants confidence this company understands his world and role
- + Wants to see an active user community and support capabilities
- + Needs to be able to defend this decision to other stakeholders in the decision-making process
- + Is highly suspicious of outdated content

## OBSTACLES TO CONVERSION

- + Doesn't know much about this company apart from one product he's heard of
- + Doesn't know what this is going to cost in terms of money and resources
- + Not sure how to sell this solution and its cost to decision makers at his company

## FRUSTRATIONS

- + Can never seem to easily find up-to-date technical specifications that cover his entire checklist
- + Worried about possible "surprises" once he already starts implementing the technology

## GOALS ON WEBSITE

- + Needs specific information about integrating this solution into his current environment
- + Wants to see real discussion and commentary from other technical users and Support
- + Wants quick overviews of features and specifications that can be used to compare with other products
- + Needs to be able to quickly gather material that can be presented to other stakeholders

## SPECIFIC WEBSITE TASKS

- + Find specific and detailed information about protocols, systems and integration
- + Read technical case studies and testimonials about implementing and maintaining this solution (perhaps vertical-based)
- + Download and/or share thought leadership resources with others
- + Contact the company for additional information
- + Register for access to a trial

