

The Savvy Marketer's Guide® to

# Leading with Personas

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# Is this guide for you?

This guide discusses  
how personas can  
be used to enable  
and build leadership  
from the ground up.


This guide is for people who embrace the notion that personas can help improve business decisions and achieve better outcomes, but who want to better understand how to use them in real-world practice. It's also for those who've made less-than-successful forays with personas and walked away thinking that only senior leaders have the clout to get project teams to adopt personas into business processes.

The focus of this *Savvy Marketer's Guide* is on bridging the too-wide gap between theory and practice. It's about how personas can be used in the real world to create alignment, shake off misconceptions and inspire innovation. In short, it's about how personas can be used to enable and build leadership from the ground up.

We will help bridge these gaps by sharing the stories of Sanjay, Susan, Isabella and Juno, four project team leads who we've had the privilege of working with at Quarry. (And, yes, to ensure privacy and business propriety, we've changed the names of those involved and some of the details.) Each story touches on a different application of personas. Each story illustrates a distinct method of persona deployment. And each story reveals a pattern of creative leadership in a demanding business situation.

Savvy marketers need to know how to use personas to lead; to use a shared and empathetic view of the customer to create clarity in collaborative decisions; and to direct collective actions that create differentiated brands and build better customer experiences. This is a valuable, rare and learnable skill. The purpose of this guide is to help you develop this skill in yourself.

**So, if you're ready to assert positive change in your organization, let's begin.**

We hope you agree there are lots of tweetable ideas in this guide.  
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## Our perspective on why personas matter

Humans are social animals. We not only respond to information from the world around us, we're also acutely aware of the emotions of others. This ability for empathy—the ability to put ourselves in another person's situation and imagine the world as they are experiencing it—is an inherent element of who we are. But it isn't a natural capacity of *corporations*.

Yet, in our present economy, developing empathy with customers has become critical for business success. Corporations that act with sensitivity to the experience of their customers are rewarded in the marketplace, while those that lack empathy risk being overtaken by competitors and disrupted by changes in the business environment.

This risk is more pronounced today than in decades past. Customers now have more avenues to share their satisfaction or discontent, improving or undermining brands with just a few keystrokes. At the same time, maturing markets and product categories mean that the days of competing on the basis of tangible product differences alone are nearly over, leaving customer experience as the key to creating competitive advantage. And what successful marketers and manufacturers are finding is that creating meaningful experiences demands developing empathy for the people they want to connect with.

### So, a central challenge in contemporary businesses is to translate the natural human capacity for empathy from an individual to a collective, *corporate* capability.

When we represent strategic customer insight in the form of personas—providing the human face and biography of a hypothetical but representative member of a strategic customer segment—we activate our natural human capacity for empathy that lies within us all. Corporations that do this well create an environment where individuals work together to set aside incorrect or outdated assumptions about the customer. In doing so, the team is free to *imagine together* the experience of the people who will interact with the corporation's products, services and experiences.

In the stories that follow, we introduce you to four savvy leaders who did exactly that. They used personas to help their team set aside unhelpful assumptions about the customer and, instead, address business challenges with a deep sense of empathy for the customers they were targeting.

So why do personas matter? Because when leaders use personas effectively, they can make a difference by producing more customer-centric outcomes than if personas hadn't been used at all.

# WIIFMB (What's in it for my business)?

## 7 things effective leaders achieve with personas

Enduring, profitable companies have effective leadership with a shared vision. And that's where personas come into play. They enable decision makers to lead by establishing a shared vision of the customer. In the following case studies, you'll see examples of how this vision of the customer benefits organizations. But let us summarize by connecting the dots between the attributes of an effective leader and the use of personas.

### Effective business leaders:

1. **Put the customer first** — The customer is always right. And even when they aren't, they deserve to be heard and understood.

Personas effectively give customers a seat at the table when decisions are being made and help create a customer-centric environment. 

2. **Challenge assumptions** — In creating personas, decision makers are forced to face the misconceptions they tacitly hold about their customers. By displacing those misconceptions, leaders can set a course for new thinking and innovation.
3. **Create alignment** — Silos exist in almost every organization. Each silo has its own relatively narrow perspective of the customer that's specific to that business unit. Personas can unify diverse teams. By offering a 360° view of a company's most important stakeholder—the customer—personas can rally employees around a notion that is shared company wide.
4. **Motivate employees** — Personas empower employees to make better-informed decisions based on what's right for the customer. This sense of autonomy helps ignite a sense of personal achievement and a desire to accomplish more.
5. **Create efficiencies** — Personas can streamline development. They help eliminate needless development cycles by establishing a benchmark—what's most likely to meet the needs of a particular group of customers—for developers. And by setting aside features customers didn't want in the first place, they help avoid feature creep.
6. **Build effectiveness** — When you're designing for every potential customer, you're not actually designing for any particular customer. Without a specific audience in mind, the design is diluted and it's at risk of failure. Personas improve the effectiveness of designs by improving the effectiveness of a key group of product users.
7. **Inspire innovation** — When your development team has one individual in mind, they can think more deeply about his or her needs and motivations. The idea of simply adding more features is replaced by an ambition to create more meaningful experiences for that individual.

## STORY 1 How Sanjay led with personas in product redesign

With deadlines looming, “I didn’t even have consensus about what the product was.”

### Reframing the challenge helps clarify the goals

A software engineer by training, Sanjay found himself at the helm of a team responsible for a product redesign effort. Sanjay’s company—a computing hardware and software leader—had slipped behind in a market it once owned and senior people had a sense of urgency about getting the new product to market and reclaiming market share.

Sanjay knew that the challenge of meeting high expectations was compounded by a highly diverse team of engineers, UX experts and product, program and project managers. “How do you train to manage a project like this?” Sanjay says. “Most days, I’d come to work not knowing whether I’d be herding cats or slaying multi-headed dragons. I needed to get this super-sophisticated product into market and I didn’t even have consensus about what the product was.”

Equally brilliant and trusted members of the team offered sharply different opinions about the vision of the product. Plus, there were competing goals and objectives—appeal to current customers, leapfrog competitors, achieve fast time-to-market to satisfy the sales organization and the street, ensure fast product adoption and protect the brand through compatibility with past and future hardware—that were often unspoken and cloaked within the requirements document.

“We had crazy timelines and we couldn’t agree on our objectives and priorities,” Sanjay says. “In short, it was your typical requirements-management nightmare.”

### How Sanjay led product redesign with personas

#### Step 1: Re-align around an experience design process

The first step Sanjay took was to actually take a step back and reframe the debate about features, moving from a product-centric to a customer-centric perspective. [🐦](#) To achieve this, he established a customer experience design process that worked in step with the product engineering work-back schedule. Sanjay’s achievement here was to move his team’s objective from “create a product with a specific feature set” to “create a particular set of outcomes for a particular group of customers.”

## Step 2: Refresh the view of the customer

While it was true that Sanjay's company had practically invented the category, it was also true that the customer's world was changing quickly. The project team turned to consumer ethnography studies to understand the nature of these changes and to build a model of how customers were responding to them. This model was expressed through a set of three personas. "In the past, we vaguely envisioned one prototypical customer," says Sanjay. "And now we had three, of which only one bore a resemblance to our original prototypical customer."

Ethnographic research helped Sanjay identify three personas. Central to the personas is the "tensions in motivation" that they feel when making decisions.



## Step 3: Build strategic scenarios


"With three personas on the table, I realized I'd actually increased the number of options we had to deal with, not narrowed them," Sanjay says. "With these personas, I also had the chance to shake loose some false assumptions and really probe our project goals."

## The three main types of personas and their roles

Primary persona	Secondary persona	Anti-persona
<p>The user or customer the organization most wants to wow. The primary research or the organization's existing research shows this customer group to be the sweet spot, the group that consistently provides the most profitable revenue, the group that the organization is most optimized to serve and delight.</p>	<p>The user or customer who can't be left out, but who isn't quite as important as the primary persona. This persona will be largely satisfied by efforts on the primary persona's behalf, but may need a few special considerations from the team in order to feel served.</p>	<p>A user or customer who must be actively excluded in order to fully serve the primary and secondary personas. For example, a company designing cutting-edge, paradigm-shifting technology might designate highly risk-averse individuals as an anti-persona.</p>

To wrangle the views of stakeholders and conflicting business objectives, Sanjay used a scenario-building process, where each persona was, in turn, viewed as the primary persona (see table above). The facilitator encouraged team members to explore and describe what would happen if, in fact, each persona was viewed as their main audience. In particular, the team sought answers to these questions:

- Who is the most natural secondary persona, whose needs must also be considered in the design?
- Who is the most likely anti-persona, the one whose needs must be actively discounted or even rejected?
- Knowing the relationship between the personas, what experience qualities must be optimized in the design?
- What product features and configuration need to be emphasized?
- How would the above choices influence the product shipping date and the expected pattern of customer adoption?

Through the scenario-building process, the dynamics of a complex system of choices became visible to the team. [By putting personas at the center of the process, Sanjay changed the mindset of the group to make customer-centric decisions.](#) 



“I won’t say the process was easy, but it sped things up and it helped improve the quality of our decisions from then on.”

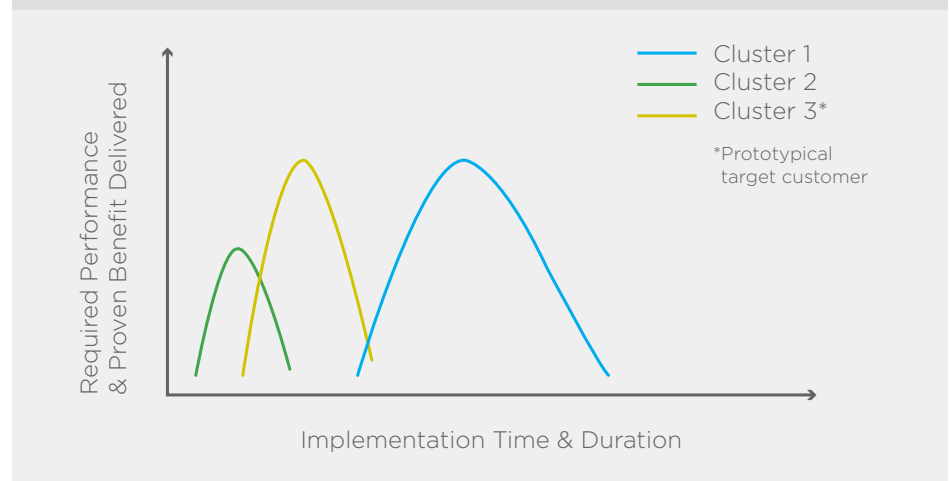
#### Step 4: Choose the persona and scenario

Members of the cross-functional and sometimes fractious team were then invited to choose one primary persona. “We moved from having these abstract, obscure models of our customers in our heads to having these tangible people we could discuss in meaningful ways,” Sanjay says. “I won’t say the process was easy, but it sped things up and it helped improve the quality of our decisions from then on.”

The implications of the chosen persona and its associated scenario were then crystallized into action plans that directed the project on multiple fronts: interaction design, engineering, go-to-market messaging and sales targeting.

One of the critical moments in this step followed from plotting the relationship of primary persona selection to the initiation and progress of market adoption. “Our breakthrough came in the realization that the best primary target was not, at least for version 1.0, our traditional target customer,” Sanjay says.

Comparing design scenarios on the basis of projected market adoption.



#### Step 5: Prototype, test and preview

The scenario-building initiative provided the team with a framework that enabled both agile development and user-centric design. The team created design concepts and tested them with end users. These concepts were then rolled into development sprints (intense periods of highly focused development) that helped create a high level of coherence between the design and the product on an ongoing basis.

One of Sanjay's accomplishments at this stage was to engage the sales channel with the new product vision. Instead of simply revealing a new ready-for-market product, Sanjay was able to provide the sales channel with a preview of the new customer experience, one that was grounded in compelling insight into unmet customer needs. This improved sales channel buy-in and anticipation.

#### **Step 6:** Ship the product, deliver the experience


Considering the tension in business objectives that were tacitly included in the product requirements documents, the project moved forward with surprising speed once the team selected a desired scenario and associated outcomes. One factor was the ability to get to market faster and at less cost by setting aside features that had previously been seen as mandatory. (This is a common benefit in persona-enabled product design.)

### Sanjay's persona-enabled product redesign process

1. Re-align around an experience design process
2. Refresh the view of the customer
3. Build strategic scenarios
4. Choose the persona and scenario
5. Prototype, test and preview
6. Ship the product, deliver the experience

#### **The takeaway for savvy marketers**

Project team members often harbor entrenched yet conflicting visions of who their customers are. Too often, these visions are mistaken for reality and furnishing the project with new personas will not overcome this problem. But explicitly contrasting these legacy mental models with robust personas can help shift perceptions and realign people's understanding of their customers.

**Once a persona is chosen—and the legacy customer model cast off—the project team is free to focus its creativity on innovation without being shackled or misdirected by outdated notions of the customer. **

Choosing a persona and scenario to target helps you manage the complexity of conflicting business objectives that so often lurk in the design requirements. For the savvy marketer, personas offer a pathway to clearer, faster, better-focused product-redesign efforts.

## STORY 2 How Susan led with personas in cross-channel experience design

“The prevailing wisdom was that our product was sold, not bought...”

### Anticipating and addressing barriers to engagement

Susan found herself charged with redesigning the corporate website for a large financial services company. Susan had customer feedback, as well as her own instincts, telling her that the current web experience was far from great. There were obvious opportunities for improvement, so the redesign should have been an easy win. But the whole process was fraught with internal political peril.

“The prevailing wisdom was that our product was sold, not bought, so the commissioned sales force had a huge influence over senior management,” Susan recalls. “And that influence extended to every aspect of marketing, including the website.” Layer onto that the usual jostling of product managers competing for prime web real estate, a risk-averse business culture and the weight of regulatory compliance and you have a situation where Susan’s opportunity to maneuver and make measurable change was narrow.

Susan needed to make the site a lightning rod for new customer acquisition. What she lacked was a compass that could lead her beyond the situation’s constraints and guide the success of the project.

### How Susan led cross-channel experience design with personas

#### Step 1: Frame the problem

In the company’s budget, the line item for Susan’s project was “website strategy and redesign,” but the objective, as she saw it, was new customer acquisition. “I wanted to keep the goal clear cut and the results so obviously aligned with our sales and business objectives that they would be hard to argue with,” she says, “so the metric I attached to the goal was web-attributed leads per week.”

Susan’s accomplishment here was shifting the main goal of project participants and stakeholders from the production of a thing (the redesign of web content and navigation) to the production of customer and business outcomes.

#### Step 2: Gather the relevant data

To pursue her objective, Susan realized that she needed to better understand the barriers barring her from meeting her goal. “I wanted to know what’s stopping people from engaging with our brand online,” she says. “Frankly, I knew the problem wasn’t the site content or navigation. It was bigger than that.”

### Step 3: Develop empathy with customers

The research revealed that there was a sizable group of under-served customers with a high level of need but who were not participating in the market. Under Susan's direction, this tension was distilled into a persona that was quite different from the conventional view of the customer, yet was easily recognizable by those around the table.



A turning point in the project occurred when Susan got groups of project contributors and stakeholders to do a little method acting—literally adopting the role of this interesting new persona. The effect was startling.

Once in role, and thus freed of their normal inhibitions, members of the team spoke the painful, unspoken truth about the customer experience. [🐦](#)

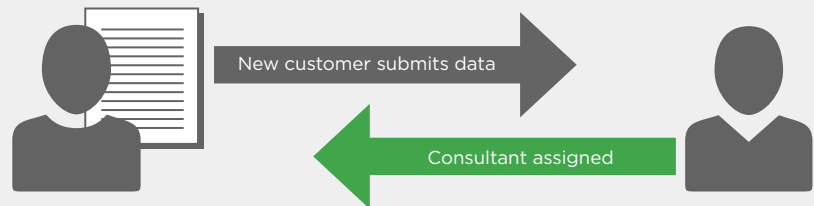
“The experience connecting—or really disconnecting—the online channel with the bricks-and-mortar, flesh-and-blood channel was glaringly obvious,” says Susan.

### Step 4: Innovate

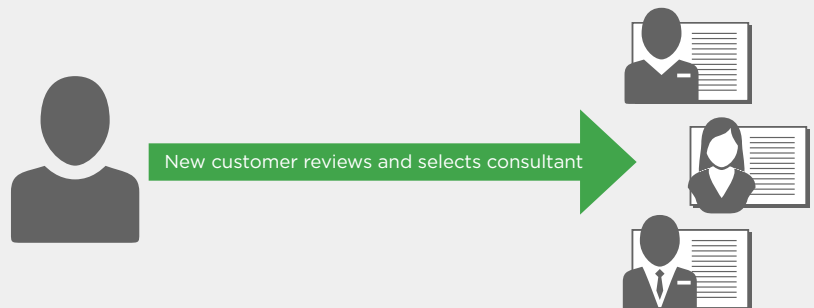
At this point, Susan and her team had the design inspiration, the customer insight and, perhaps most importantly, permission from her large, complex organization to reinvent a critical step in the buying journey. By rebuilding the process that linked website visitors to a real-world sales force, Susan not only achieved real progress on customer acquisition performance, she created an experience so distinctive that it became the focus of a national brand-building campaign.

Empowering potential customers by letting them choose a sales consultant, rather than being assigned one.

#### Old process - Customer is assigned a consultant



#### New process - Customer selects consultant



### Susan's persona-enabled cross-channel experience design process

1. Frame the problem
2. Gather the relevant data
3. Develop empathy with customers
4. Innovate

#### The takeaway for savvy marketers

What started as a tactical project morphed into a strategic initiative. And Susan was largely responsible for the change. Susan took steps to focus resources—the most important of these being people's attention—toward the strategic possibilities of the project. These steps worked as a system, each building upon the other. Without the strategic framing of objectives, the project would have sought different customer data. Without the personification of an unaddressed, unarticulated need in the form of a persona, the effort would have led to other conclusions. And without the use of role playing, it's unlikely that the social license would have been created for a web project to change a sales-operation process. Susan's story is an inspiration for savvy marketers handed what might look like just a tactical assignment, but who sense it should be much more.

## STORY 3 How Isabella led with personas in product innovation

Isabella understood that consumers essentially “hire” products to help complete “jobs” that need doing.

### Targeting unarticulated customer needs

Isabella was leading the product-development organization of a market leader in telecommunications services that was facing a technology-enabled disruption. A nimble regional player from an adjacent category was peeling off high-value customers, foreshadowing a wider collision of competitive categories and a deeper disruption to come.

“As an organization, we saw it coming. My group was created early on, as a response to the anticipated disruption,” Isabella says. “At this point, though, we’d started to face monthly erosion from our customer base and things had become frighteningly real.”

Access to technology was not a problem. Her employer had enviable market power and Isabella’s calendar was filled with presentations by technology vendors offering to deliver new services and features to enhance her company’s central offerings. But when Isabella looked at her company’s track record of commercializing such technologies, “home runs were too few and there were way too many complete strikeouts,” she says. It was her job to plot a new course.

### How Isabella led product innovation with personas

#### Step 1: Reframe the problem

Given that efforts to get customers to try new services were failing, Isabella decided that the solution might rest in refocusing the team’s attention on customers’ desired outcomes and experiences, as opposed to her team’s comfort zone of “putting the newest technology in front of customers.”

It was clear that the team lacked a deep understanding of customer needs. Isabella understood that consumers essentially “hire” products to help complete “jobs” that need doing. She commissioned some research into what those “jobs” were for her customers.

The resulting consumer ethnography study revealed several such jobs, some explicit, obvious and familiar, but one that was more implicit, unarticulated and surprising. Five personas were created dramatizing these insights.

### Step 2: Identify the right target customer

When Isabella shared the five personas with her team, everyone assumed that the “Tom” persona was going to be the target for the next innovation effort. “Tom felt familiar, likable and altogether the ideal picture of a customer for a new technology-driven product,” says Isabella. “After all, just like most members of my team, Tom was an electrical engineer.”

Here’s where Isabella got creative. She unearthed the product launch post-mortems for a series of failed new products. Then she facilitated her team through the process of identifying which of the five personas was the best fit with each of the failed products. Repeatedly, Tom was identified as the persona these failed products targeted.

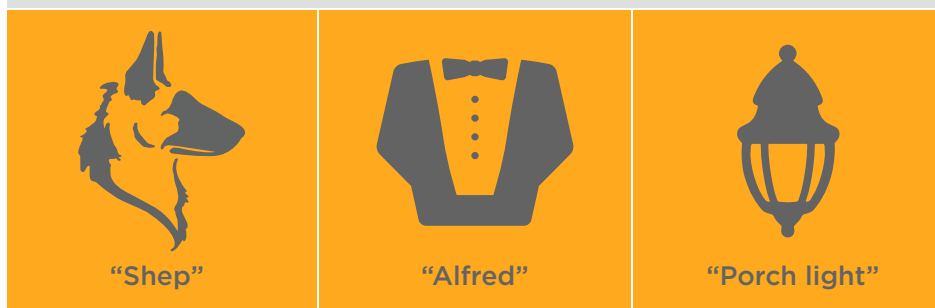
“When we designed with the tacit assumption that Tom was our primary customer, we failed,” says Isabella. In this way, Tom was transitioned from an implicitly assumed primary persona to an explicitly defined anti-persona.

### Step 3: Pair personas with metaphors


With the Tom persona out of the way, it was easy for the team to select a primary persona, “Paul,” who most vividly experienced the unarticulated need discovered in the research.

Isabella’s creative leadership was not complete. With the Paul persona selected and his job understood, she recognized that she needed a better handle on how Paul would perceive a possible solution. What language would he use to describe the product? Isabella initiated a second round of research, where consumers who were very similar to Paul were recruited and shown a set of sketches selected to metaphorically describe or exemplify the proposed product concept.

Three metaphors (aka *concept models*) to help customers articulate the experience they desired with the new product.



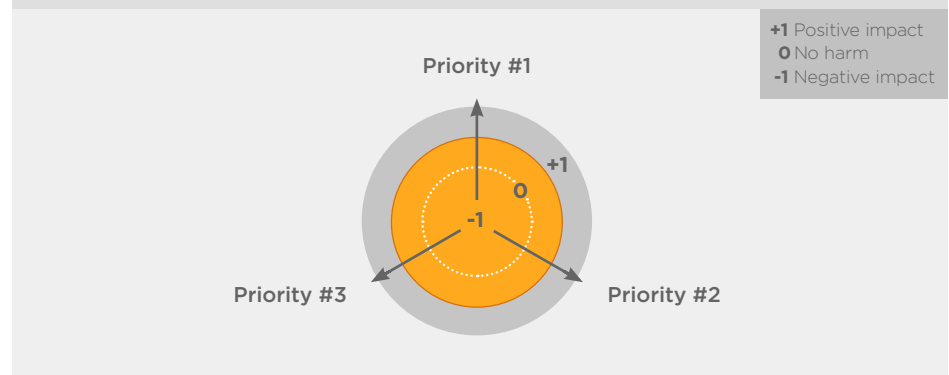
Participants were shown each metaphor, or *concept model*<sup>1</sup>, and asked to express how each one might relate to the upcoming product. (For instance: “Shep makes me think of unquestioned devotion and reliability. Both of which are great in a dog, but they aren’t characteristics that I really want to associate with this product because...”) Isabella was able to extract invaluable insight about how to integrate technical features and how to communicate the value proposition of an innovative new service addressing unarticulated needs.

“By giving our ‘Pauls’ these abstract metaphors for a potential product, they gave us not only a technical appreciation of what they wanted, but insight into their emotional and contextual needs too.” 

#### Step 4: Set design priorities

With the persona and the selected concept model defined, Isabella elected to guide the design process with a third resource—a set of three design priorities that would constrain design choices and act as a framework for prototype testing. These priorities were distilled from the research insight that gave rise to the Paul persona.

Isabella’s three design priorities—depicted here in a *brand compass*<sup>1</sup>—remind the project team of the tensions in motivation that Paul feels in his decision making.




<sup>1</sup>We encourage you to download *The Savvy Marketer’s Guide to Digital Experience Design Strategy* ([quarry.com/experiencedesign](http://quarry.com/experiencedesign)) if you want to delve deeper into concept models and brand compasses (another tool which we’ll introduce momentarily). While personas help us understand the customer more deeply, these tools help us understand the broader context and the design priorities, as well as provide straightforward advice specific to each project.



**Step 5: Prototype and test**

Isabella's team developed interaction prototypes and evaluated them to ensure they were in accord with the three design priorities. At one point, this process required an intervention; the testing revealed that the design was drifting away from meeting the needs of Paul and toward those of Tom.

“It could have been a major setback. But we already had consensus on our persona. That unified the team and put us back on track.” 

**Step 6: Assess market demand**

Isabella used a quantitative research exercise to assess demand in the market. She produced an online promotional video for the concept and asked for feedback from prospects using a web survey. The results of the survey projected take-rates and optimal pricing. The financial projections for the project proved highly promising.

However, there was an obstacle: Isabella's organization was not aligned to capitalize on niche-market offerings like hers. So, despite all of Isabella's team's effort and the promise it showed, the company's finite pool of development and marketing resources were focused instead on an alternative product offering, one seen as having a larger mass-market opportunity.

### Isabella's persona-enabled product innovation process

1. Reframe the problem
2. Identify the right target customer
3. Pair personas with metaphors
4. Set design priorities
5. Prototype and test
6. Assess market demand

**The takeaway for savvy marketers**

Isabella pushed the use of personas to its creative utmost. However, the way this story ends offers a cautionary moral for savvy marketers. When personas are developed to serve a single purpose—even if that purpose is important, like devising a sustaining innovation—there is a real risk that competing views of the customer from elsewhere in the organization will collide with the persona and impede the innovation agenda. Isabella was a savvy marketer, but, she says: “If I could do it all again, I would have been more ambitious. I would have pressed for the adoption of a single set of strategic personas to span the product development, customer service and marketing organizations.”

**And that leads us to our next story.**

## STORY 4 How Juno led with personas in a strategic marketing turnaround

“We had to stop our competitor before they really established themselves among SMB firms.”

### Retooling the business for customer-centric execution

A globally admired manufacturer was suffering from a persistent market share decline in its product portfolio aimed at small-to-medium business (SMB) customers. Despite advantages of brand, product engineering and distribution, the company was losing customers. Juno was charged with solving this highly strategic problem.

“Here’s the thing: the SMB audience has significant buying power in its own right,” Juno says. “But our bigger concern was that our competitor, by gaining traction with SMB owners, would make inroads with our highly profitable enterprise customers too. We had to stop our competitor before they really established themselves among SMB firms.”


Juno decided to take a closer look at the SMB audience.

### How Juno led a strategic marketing turnaround with personas

#### Step 1: Frame the problem

Early on, Juno made sure that stakeholders in the initiative understood the difference between tactical and strategic actionability. Juno saw that the previous categorization of customers was typical of a manufacturing-driven organization and focused largely around the tactical need to get the right amount of product to the right places. Juno’s mission was more strategic—engaging SMB customers through more customer-centric business execution. And that required a deeper grasp of customer goals, motivations and unarticulated needs. There is a tradeoff to manage between strategic and tactical actionability in segmentation, so this was an important early choice to validate.

#### Step 2: Challenge old assumptions

A phrase that Juno found himself using in discussing the goal of his initiative was “the differences that make a difference.”  In the then-current segmentation model, a single difference was emphasized—the value of goods a customer produced. The more revenue the customer organization generated, the greater its presumed buying power and lifetime customer value to Juno’s company. But was this a good differentiator? Juno decided to test the theory that firm size explains and predicts customer behavior.

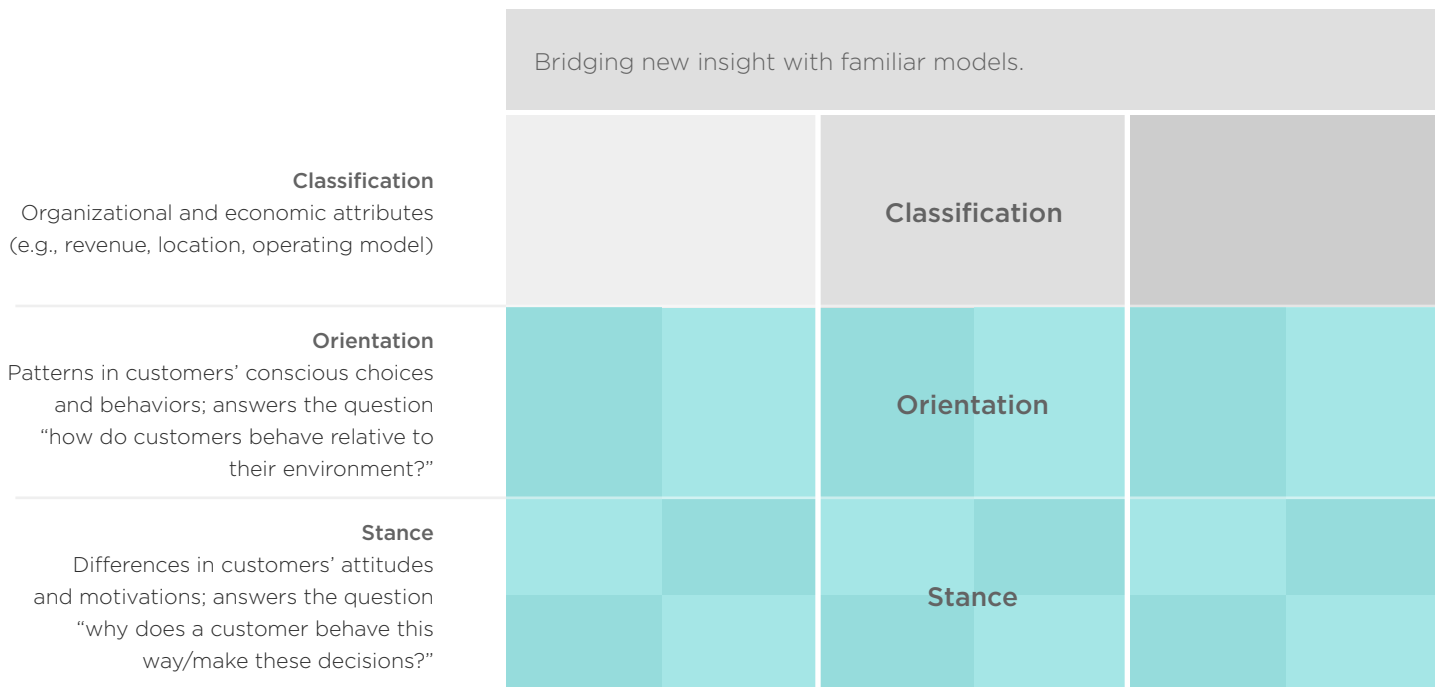
To do so, Juno commissioned an ethnographic study of SMB customers, followed by a survey that quantified firm size, behaviors and attitudes. The survey respondents were grouped (or “clustered”) on the basis of their responses to attitudinal statements. Then the value of their product production and other demographic and behavioral data were layered on. These patterns were then synthesized into six personas.

If size was the primary “difference that makes a difference,” then it would predict strategically relevant behaviors. The data showed a more complex reality. Size mattered, but within the different size categories, attitudes were a much more powerful predictor of behavior. Juno’s research had proven that an over-simplified segmentation model was misguided.

For Juno, this was a good news/bad news story. This new insight helped to explain historical events and pointed the way toward better business outcomes. “Yes, this new insight was great,” he says. “But we had to compete with a worldview that had been entrenched in every business unit and every process across our company. No number of PowerPoint slides was going to fix this.”


**Step 3: Bridge the old with the new**

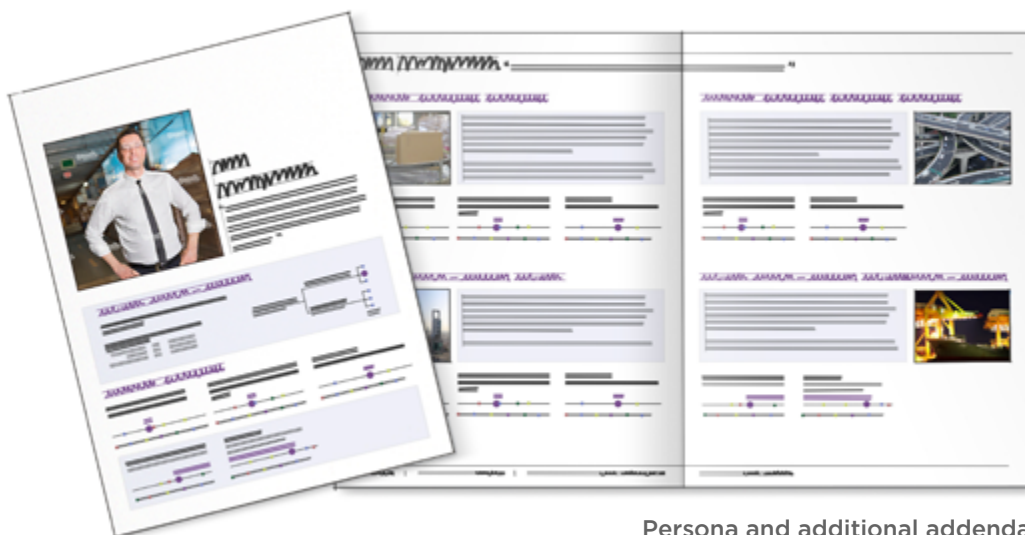
Juno looked for ways to create bridges between the new insight and the familiar models that existed in the organization. In effect, rather than try to displace the old model, he took what was right about the model—that customer firm size mattered—and built upon it. Juno’s new framework wove in the new findings on attitude and behavior, creating a more robust and predictive model.



Next, Juno began to both enrich and test the validity of his model by layering on new research findings. Some of these studies were based on further analysis of the original segmentation study. Others were derived from follow-up studies by other business units on the buying process, on inventory and attitudes towards products owned. With each successive layer of new information, the explanatory and predictive power of the attitudinal layer of the framework became more coherent and robust—while the power of the original segmentation dimension (the classification) receded.

In the course of this process, Juno continued to share his findings with the organization at large. “Persona addenda” were created for each of the major research studies. These addenda still featured the same characters who were part of the original customer model, but with new call-out quotes, infographics and narrative content. “These addenda made the research findings accessible to the people who needed the data to solve specific problems,” Juno says.

“It wasn’t asking them to replace what they understood from before; it elaborated on it, all while gently introducing this new segmentation framework.” 



Persona and additional addenda



Finance focused



Purchase focused



Product focused

**Step 4: Make the theory practical**

With his research and communication efforts, Juno had reached some, but not all, of the people who needed to participate in re-engaging the brand with the SMB customer. His next step was to broaden the reach of the new thinking by translating it into simplified, practical how-to tools aimed at specific tasks in product management, product design, marketing and sales. By associating these tools with mandated processes and making them available through the corporate intranet, he was helping people who just wanted to do their jobs at the same time as he was helping the organization change the way it engaged customers.

**Step 5: Share success stories**

As early wins emerged, Juno shared these success stories to build support for a more customer-centric framework across a wider swath of the organization's global enterprise. As new research was conducted, it extended the strategic segmentation framework Juno began and thus embedded a model, one more suited for customer-centric use across the global enterprise. "People want good news, particularly when that news helps reinforce what they already know and believe," Juno says. "The fact that they're embracing a new framework is secondary to them—but it was primary to us."

### Juno's persona-enabled strategic marketing turn-around process

1. Frame the problem
2. Challenge old assumptions
3. Bridge the old with the new
4. Make the theory practical
5. Share success stories

**The takeaway for savvy marketers**

In our experience, Juno's story is one of the most profound examples of the use of personas in inspiring innovation; personas put to work to change the way a whole business operates. The personas in Juno's story displaced a segmentation model that was running into trouble. Savvy marketers wishing to use personas for the same end could benefit from Juno's discovery that you can use a poor, but entrenched, theory to piggyback a more robust business framework into the daily workings of an organization. Then use techniques like persona addenda, practical how-to guides and storytelling to ensure the new framework eclipses the old model.

In Juno's case, it was not enough to discover the new insight. Building on existing understandings and sharing it effectively were all necessary to actually bring about change. But through all these steps, personas were a central resource in leading organizational change

## 4 ways savvy leaders use personas

There you have it. Four different stories about leaders in very different situations. But are there important similarities between Sanjay, Susan, Isabella and Juno? Are there commonalities in the way they used personas to help them achieve success? We think so.

**Each leader created and leveraged personas to:**

### 1. Simplify complexity

While the tasks were different, all four of the people studied in this guide faced complex situations in which the achievement of a business outcome depended upon diverse people coming together and making better choices in an atmosphere wrought with ambiguity. All used personas as a vehicle to guide thinking and lead positive change. And, in all cases, personas were ultimately used to constrain possibilities and simplify the complex to a point that a particular course of action made sense.

### 2. Displace prior biases

In the first three stories in this guide, the persona that was ultimately selected as “primary” replaced an older mental model of the customer. In the fourth story, Juno’s, what was displaced was not just the single mental model of a customer, but also a whole system of customer categorization that affected almost every unit in his organization. In all cases, a valuable part of the persona’s function was to free individuals and teams by discarding unhelpful ideas about the customer.

### 3. Fuel decision-making activities

Rather than looking at personas as the only resource they needed for problem solving, Sanjay, Susan, Isabella and Juno brought leadership to their initiatives by integrating personas with other decision-making tools. In Sanjay’s case, this involved predicting the adoption rate of the product for each of the potential primary personas. In Susan’s case, she employed personas in the context of buyer-journey mapping to identify a key disconnect. Isabella leveraged the concept of the anti-persona in order to prevent history from repeating itself. In Juno’s case, he used personas as a framework with which to accumulate and contextualize new research findings. This really goes to underscore the point of this guide—that having or using personas isn’t enough to ensure success; it depends upon their artful use in solving the problem at hand.

### 4. Personify quality insight

Context matters. In each of these stories, the project lead carefully selected the right research approach to investigate his or her particular business situation. In every case, there was a serious primary research effort aimed at discovering new and actionable insight. In the real-life cases upon which these stories were based, the data for the personas began with qualitative research using customer ethnography.

Ethnography seeks to understand people within their particular context, rather than presuming some understanding of them and immediately trying to use a pre-determined set of characteristics to measure them. The nature of this research makes it more amenable to the discovery of highly actionable customer insight.

In some cases, such as Juno's, quantitative research follows qualitative methods as a means to validate and extend the value of actionable insight across the organization. In other cases, only ethnography was used. In all cases, though, the upfront investment in ethnographic research paid high dividends when put into the creative and capable hands of people like Sanjay, Susan, Isabella and Juno.

## Now it's your move

This *Savvy Marketer's Guide* was based on the experiences of members of Curve Jump™, the Quarry team focused on equipping change leaders in established corporations with the kind of customer insight required to fend off disruption, to innovate and to build stronger brands. We frequently build personas to help clients adapt and thrive in these business situations. We had the privilege of playing outfitter and trail guide to the people you met in the stories here. Our intention in offering this *Savvy Marketer's Guide* is to help our clients—present and future—leverage personas to the benefit of their companies, their customers, their colleagues and their own career experiences.

We'd love to hear your feedback and any questions you may have about this guide. And if you want to discuss the use of personas in your work, we'd be happy to learn about your story.

Follow us on Twitter [@Quarry](#) or start the conversation by emailing Glen at [gdrummond@quarry.com](mailto:gdrummond@quarry.com).

## About this guide

The *Savvy Marketer's Guide to Leading with Personas* was written by Glen Drummond, with key contributions by Mo Oishi, Diana Wiffen, Tony Mohr and Richard Hill.

If you'd like to learn more about discovering, refining and sharing actionable insight, we offer the *Savvy Marketer's Guide to Digital Experience Design Strategy* ([quarry.com/experiencedesign](http://quarry.com/experiencedesign)), a companion guide to the one you're reading now. It introduces techniques that complement and enrich the use of personas. You can download it for free.

## About Quarry

Quarry transforms brands for complex businesses. We specialize in serving savvy marketers at two inflection points in their business lifecycle. For brands poised for expansion, our Growth Curve™ offer accelerates growth to deliver maximum competitive advantage and measurable results. For brands facing disruption, our Curve Jump™ offer delivers strategically actionable buyer insight to reignite stalled innovation and redefine brand advantage. Winner of MarketingProfs' 2013 B2B Agency of the Year, Quarry works with leading brands such as John Deere, eBay, Acklands-Grainger, Purolator, Primus Business Services and Syngenta Canada, among others.

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