What are best practices for developing customer personas?

An Ask E Source answer
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Q:How popular are personas, and what are some best practices for developing them?

A:Customer personas have gained traction among utilities. According to the E Source 2016 Customer Experience Survey, more than half of surveyed utility respondents have developed personas (**figure 1**), but most use them in narrow applications.

Figure 1: What are utilities using customer personas for?

Most utilities use personas in narrow applications. The broadest case (educating employees about customers) represented less than half of the 33 utilities surveyed.

Whether it's preferable to develop specific personas for projects as opposed to more-general personas that can span the organization depends on your objective. Arguments in favor of developing personas for narrow use cases include:

- Focused personas are more likely to be applicable to the project
- Project teams are more likely to use the personas, having devoted resources to creating them

Developing personas for use across the company also has advantages:

- Widespread adoption can lead a cultural shift toward customer-centered decisions and behaviors
- It's likely a company will devote resources toward producing well-researched personas
- Having ready-to-go personas lowers the barrier to using them and can lead to application across projects

The reality is that these approaches are complimentary. It's hard to overestimate the importance of a customer-centric culture reinforced with customer-centric tools. Widely understood personas allow employees to communicate effectively in strategy meetings, journey mapping workshops, and other

situations where customers could be absent from the discussion. From this broader persona, more-specific personas can form.

Another strategy among utilities' customer experience departments is to look for toeholds among their internal clients to prove concepts and demonstrate success. Ultimately, the "right" approach is situation-dependent. Companywide personas can have a large impact, but there's the possibility those personas aren't utilized and then gather dust on a shelf.

Segments versus personas

Based on my discussions with utilities, I believe that most utilities base their personas on demographic segments and make them more human with a name and information about their lives. Most people find this approach intuitive because it's based on familiar market research. If the goal of the persona is to get the organization to be more customer-centric, then this approach can be effective.

E Source has been advocating ethnographic—or observational research—as an effective way to understand customer attitudes and behaviors, and personas can develop from this process. Ethnographic research is a process of conducting detailed interviews and observing how consumers interact with products in their own environment. Picture marketers observing a family do laundry, wash dishes, and pack snacks while getting ready to head to soccer. This approach is more likely uncover latent needs than market research or focus groups.

Persona hierarchy

Having a hierarchy of personas to inform a project is common in software and web design, but we don't know how widespread this practice is beyond those areas. Identifying primary and secondary users/personas can help identify and prioritize important elements of the work.

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