

An aerial photograph of a zebra crossing on a city street. The crossing consists of alternating black and white horizontal stripes. Several pedestrians are walking across the crossing, their shadows cast long and dark on the white stripes. The scene is brightly lit, suggesting a sunny day. The text 'BUILDING PERSONAS with QUANTITATIVE PARTNERS' is overlaid in the center of the image.

BUILDING PERSONAS with QUANTITATIVE PARTNERS

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KNow Research

How KNow Research and our quantitative partners band together to develop, validate and deliver actionable personas.

Developing target audiences, segments and personas can be a daunting task. We see our clients floating in a sea of hypothesized, brainstormed and semi-validated personas and encounter brands struggling to bring them to life so that they live and breathe within the organization. *Ideally* these customer profiles give decision makers to **stable place of focus**; a grounding in who their customers are and what they need and want.

Fully-fleshed, stable personas can allow brands to move forward with surety, secure that no matter the twists and turns of the market and consumers' worlds, they know their audiences and can design for them and market to them appropriately.

However, of course, people change too! So, brands also need to be sure that they **revisit** and **refresh** those audience personas so they stay true. That's often when the power couple KNow and our quantitative partner step in. We assess existing insights work and current audience segments (if available), review changes the brand has made recently and conduct mixed method primary research to deliver updated, actionable personas.

Over the years, we have found 4 key steps to persona design that any brand can use to Assess, Revisit, Validate and Illuminate these crucial customer groups. They've upped our persona game, and they can do the same for you!

#1 Assess

The first step is to ask yourself; where do you stand? How well do you know your customers? How closely do your teams hold them to their hearts and minds? How influential are your key target audiences in business decisions?

- If the answer to any/all of those questions sounds like *'huh...I'm not sure...not very well/close/influential'* then it's time to move to Step 2.
- However, even if the answer is *'very/always'*, you might still want to take a second look. What if those personas you're holding close and making decisions about are based on insights work from 3, 5 or even 10 years ago? What if they were created at a time before you added brands to the portfolio (or some left the family)? What if you have a suspicion that something in the broader landscape (e.g., gender roles, COVID impacts, generational shifts) may have impacted who your customer is and what they want? Then move to Step 2.
- And lastly, what if your answer is *'I know their demographics and/or customer data really well but I don't have a clue what makes them tick?'* Well, in that case you may be working with outdated, limited personas. We often see brands who just know their customers' **demographic** profiles (age, gender, location, income) and/or their **sales data** (number of widgets purchased, number of clicks, number of downloads, average sale). And don't get us wrong, this is great data to have, but it doesn't give you the full picture. So, consider Step 2.

Remember, the goal is to bring your customer to life so you feel like you know them inside and out and can not only meet their needs, but work to surprise, delight and – most importantly – retain them.

Case Study:

We worked with a sports/media brand in acquisition mode. They had recently purchased another complimentary brand in the space, and they knew both sets of customers well. They knew what each liked about their current platform, how much they were playing and paying and what kind of traffic/usage their apps and content were getting. But what they didn't know was what each group would miss most if the brands were to merge their offerings. Who would be upset? Who would feel lucky? How different were these audiences really? What did they have in common?

After **Assessing**, the brand decided to move forward to persona work; we helped them understand the uniqueness (and the important differences) between their audiences to help them move forward confidently with the changes (and communication about those changes to the groups affected)

Bonus: Your marketing and sales teams will appreciate your efforts to give them updated, actionable persona groups to target and speak to.

Pro Tip: KNow when you *don't* need to refresh! Just because you're managing a new team or going through a merger or have extra insights budget to work with doesn't necessarily mean you need a refresh. If you've got recently created multi-faceted personas that work for you and your teams, use that budget in another way. (*We can help with that too of course.* 😊)

#2 Revisit

Don't start from scratch! Unless you're a brand new brand, start by revisiting past persona work specifically, and insights work in general.

- Use past information to build **hypotheses** about what may have changed.

- Get your team together for a **brainstorming session** to determine what you know; what you *think* you know and what else you need to know to successfully know your customers.
- Decide how the new work will be used, by whom, when? Answering these questions will drive your decisions on what **deliverables** you need to produce, always a key decision to make before diving into research!

Whether you're briefing an in-house team or a third party agency, do this crucial set of prework so that your results do what you need them to do and come in a form that is most useful to the organization.

Case Study:

A fitness brand knew that they likely had 1-2 key customer groups (e.g., those who were the most committed and passionate about the brand). Initially, since budgets were tight, they considered concentrating their insights efforts on these groups. However, thanks to internal brainstorming sessions and ideation meetings with KNow and our partner [Longitudes Group](#), they decided they needed to know *all* their customers better and bring them all to life so that they could watch for growth opportunities and understand ways they could make the other groups more passionate and committed to the brand in the future.

The resulting report showcased not only what made the passionate groups passionate, but opportunities to connect with the other segments more compassionately and appropriately.

Pro Tip: If you are engaging multiple agencies/teams, brief them together so that they can **collaborate** on the process and deliverables. This is the secret sauce to our partnership with our quantitative partner; our clients bring us to the table together and we deliver a combined report, bringing the quantitative segments to life with qualitative insights. We couldn't do that so smoothly if we weren't both at the table together from the start.

#3 Validate

We at KNow are primarily a qualitative research firm, but we know – especially for personas to live and breathe within our client organizations – that numbers count. Hence our partnership with our trusted quantitative partners.

Using robust databases with statistically representative sample sizes gives us the confidence that we can run multi-variate analysis that uncover those consumer segments. With enough data we can dig deep into more than just their product use, but also contributing factors like family life and work life that can help further paint a picture of who we're talking to.

Case Study:

One of our clients is lucky; they have a huge customer database and are a dominant player in their category. This makes it easy for them to send a survey out to everyone in their database to build personas. However, on a recent project Longitudes Group pushed them to widen their net and to purchase panel/sample outside of their customer base. This scope change allowed them to not only learn more about potential customers, but it also helped reveal who is not in their customer base as well. By extending, we got a better sense of the overall market and revealed more than looking at only customer data.

Pro Tip: Size matters. Be sure to connect with your internal stakeholder team to see what sample size they find most compelling/convincing. Be sure your personas meet those requirements so that they are as impactful as you want them to be within the organization.

#4 Illuminate

Don't stop with the numbers! Be sure to infuse your personas with the wit and wisdom of qualitative participants as well. **Bring personas to life** with verbatim comments, video clips and reels and qualitative commentary and themes.

- **Bare Minimum:** Don't let your open ends go to waste! Be sure to ask (more than one) open ended questions throughout the survey to allow participants to bring their own voice to the survey results. And use those voices liberally in the report to explain the reasoning behind the data points.
- **Robust:** Conduct a series of follow-up qualitative sessions to dig deeper in the form of 1-on-1 interviews or mini-groups. Be sure to select and/or recruit participants who fit the persona groups you are uncovering!
- **Best-in-class:** Merge the insights. Don't let the quant and qual sit in their own silos; create a combined presentation with podcast episodes, video clips and/or sizzle reels bringing the voice of the persona groups into the room with the data. Get creative with visuals; use posters, signs, emojis, intranet pages (anything you can think of!), to bring the personas into the organization past the presentation.

Remember, personas are people. Introduce your team to them as well-rounded, complex, nuanced consumers using all the audio/visual/data/text ways you can. Everyone learns in different ways, and you want everyone on your team to get to know these key customer groups.

Case Study:

A media client understood their customer groups numerically but didn't have a sense of why they watched what they watched. We conducted a quick pop-up [Booth® Insights](#) project following a persona study and explored what content worked best for which group and why. We uncovered insights that explained why some personas watch instructional content and why others watched fitness content and how those choices related to their demographics cohort.

Bonus: Be sure to create typing tools and/or question sets that allow you to ‘type’ participants into persona groups going forward as well; your future research endeavors (and agencies) will thank you.

Pro Tip: We conduct an interim [Insights Workshop](#) between the quant and the qual to get a sneak peek at themes as they emerge in the early stages of quantitative analysis. Our qualitative team uses those themes to build our follow-up discussion guides so that we can dig deep in the areas that count.

In Summary

1. **Assess** – Ask yourself key questions to be sure you need persona work
2. **Revisit** – Review existing data and collaborate with your team and partners to determine how you will use the output from the study, and therefore what deliverables will serve you best
3. **Validate** – Feel confident you will be able to hang your hat on the results by creating validated personas
4. **Illuminate** – Bring those personas to life with creative tools and deliverables to let everyone within your organization get to know them so that they can make decisions with them in their minds and hearts

Other resources? We love learning how others build these crucial insight tools, so check out [Little Bird Marketing's Buyer Persona resources](#) and the [Insights Association's Power Personas](#) and let us know what other great resources you find!

At KNow, we are committed to collaboration, and will continue to use and explore persona design and illumination techniques. Let us know how you've upped your persona game lately: admin@knowresearch.com