

# Gaining Market and Customer Insights through In-Depth Interviews



Week Two



# Contents of this Video

- Week Two Learning Objective – Describe the Target Personas
- Deciding Which Personas to Target
- Examples of Personas
- Tools and Templates
  - Buyer Persona
  - User Persona
- Week Two Assignment Instructions



# Course Syllabus

Week	Learning Objectives	What You Will Learn	Attachments	Assignment
1	<p>Define the scope of the research project</p> <p>Create an issue tree</p>	<ul style="list-style-type: none"> <li>How to frame up the project, in order to socialize it with your co-workers / supervisor / client, and gain consensus on what problem(s) you are trying to solve with the research</li> <li>Definition of an issue tree, how to construct one, and what level of detail to include at this stage</li> </ul>	<ul style="list-style-type: none"> <li>SCQH article</li> <li>Issue tree example</li> </ul>	Create SCQH and issue tree
<b>2</b>	<b>Describe the target personas</b>	<ul style="list-style-type: none"> <li><b>How to create persona profiles, and how to prioritize which persona(s) should be targeted for research</b></li> </ul>	<ul style="list-style-type: none"> <li><b>Persona templates</b></li> </ul>	<b>Create persona document</b>
3	<p>Create an interview guide</p> <p>Recruit customers for the research</p>	<ul style="list-style-type: none"> <li>What constitutes a good interview guide for particular lengths of interviews (e.g., 30 minutes vs. 60 minutes), how to start and end an interview, and the importance of open-ended questions</li> <li>Methods for identifying, soliciting and securing agreement from your interviewees</li> </ul>	<ul style="list-style-type: none"> <li>Interview guide example</li> </ul>	Create interview guide
4	Conduct phone, video or in-person interviews	<ul style="list-style-type: none"> <li>How to prepare for a good phone interview, as well as processes and technologies to help them be successful</li> </ul>	<ul style="list-style-type: none"> <li>Best practices when conducting an interview</li> <li>Recording of past interviews</li> </ul>	5-10 minute audio / video recording of a mock interview
5	<p>Analyze interview transcripts</p> <p>Identify recurring themes, voices and key takeaways</p>	<ul style="list-style-type: none"> <li>The value of recording and transcribing interviews, and a method to identify the right data contained in the interviews</li> <li>How to "boil the ocean" and pull-out the most-important messages from the body of interviews</li> </ul>	<ul style="list-style-type: none"> <li>Transcript examples</li> <li>Affinity diagrams</li> </ul>	Read three transcripts and develop an affinity diagram
6	Develop a report of the research	<ul style="list-style-type: none"> <li>Common report templates and storylines, and how to frame the results appropriately for the audience you're presenting to</li> </ul>	<ul style="list-style-type: none"> <li>Final report examples</li> </ul>	Slides or document summarizing market intelligence gleaned from research



# Where are we in the Masterclass?

- Last Week
  - Identified a **key question** we want answered through in-depth interviews using the **Situation >> Complication >> Question >> Hypothesis** (SCQH) framework
  - Underpinned the key question with an **Issue Tree**, to help organize many of the underlying questions that need answering
- This Week
  - It is now time to think about how we'll get the answers to our questions, so we begin to think about the following:
    - *The people we want to talk to*
    - *The questions we want to ask them*

# Who should we talk to, to get answers to our questions?

- Start with the Issue Tree ... what do we want to know?
- Ask ourselves: who can provide us those insights?
  - *Existing users?*
  - *Purchasing decision-makers?*
  - *Influencers or experts*
  - *Potential users?*
  - *Customers of competitive products?*



# When defining the “Who,” be **FOCUSED** and **SPECIFIC**

- Keep your list of personas small; you want to talk to people who have a lot in common, so you can identify key trends within that segment
- Strive to get very specific
  - NOT: Vice Presidents of supply chain
  - BUT INSTEAD: Vice Presidents of supply chain at Tier one North American automotive suppliers (>\$1B sales) that have purchased a robotic palletizing system in the past 24 months



# Other examples of getting specific with segments



Orthopedic surgeons who perform more than five outpatient surgeries / procedures per week at independently-owned ambulatory surgery centers and use a transcription service for documenting their dictated procedure notes



Owners, CFO's or IT leads at small businesses (<\$10M sales) in the Phoenix metro area who signed-off on purchasing our IT services in competitive deals against Vendor ABC within the last two years



High school and community college instructors that teach career and technical education (CTE) courses and are struggling to adjust to the requirements for remote teaching during COVID-19

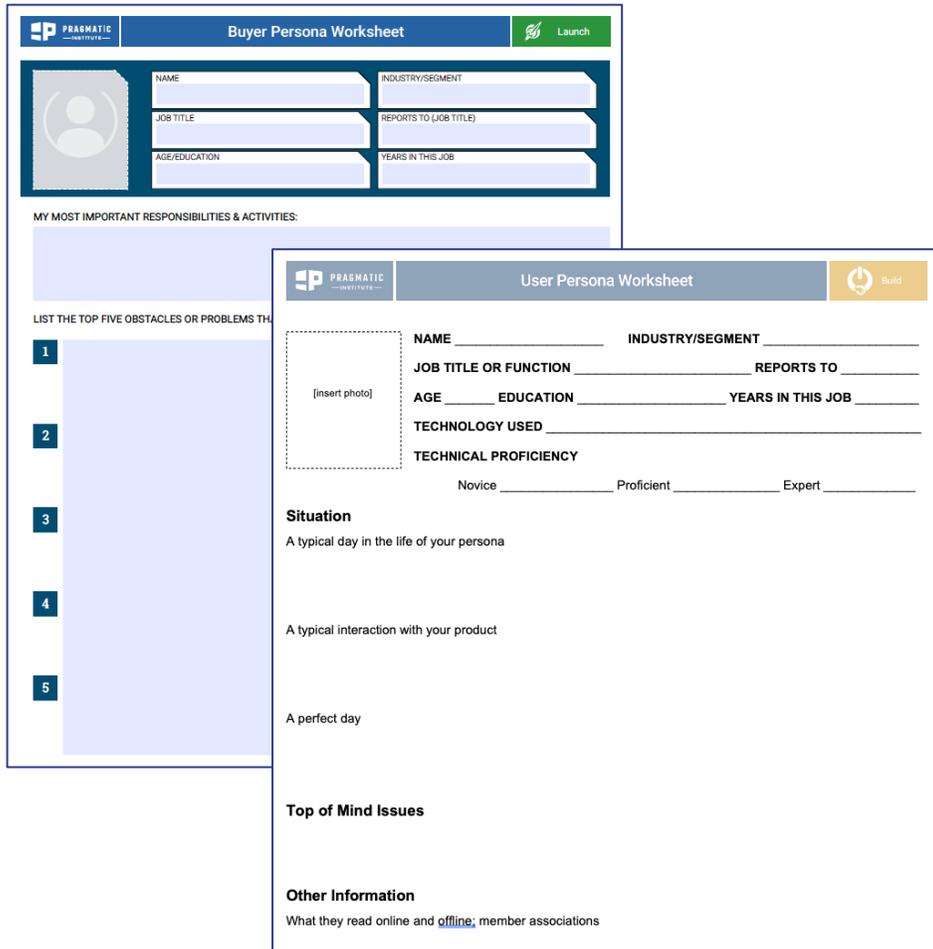


VPs / Directors of IT at regional food and beverage retailers that have rolled-out "click-and-collect" shopping for customers using a third-party provider (e.g., Instacart, Shipt)



Business development or sales representatives at Midwest resellers of 3D printers who call on machine shops and have experience selling Brand XYZ

# Persona Definitions



The image shows two overlapping worksheets from Pragmatic Institute. The top worksheet is the 'Buyer Persona Worksheet' and the bottom one is the 'User Persona Worksheet'.

**Buyer Persona Worksheet:**

- Fields: NAME, INDUSTRY/SEGMENT, JOB TITLE, REPORTS TO (JOB TITLE), AGE/EDUCATION, YEARS IN THIS JOB.
- Section: MY MOST IMPORTANT RESPONSIBILITIES & ACTIVITIES:

**User Persona Worksheet:**

- Fields: NAME, INDUSTRY/SEGMENT, JOB TITLE OR FUNCTION, REPORTS TO, AGE, EDUCATION, YEARS IN THIS JOB, TECHNOLOGY USED, TECHNICAL PROFICIENCY (Novice, Proficient, Expert).
- Section: LIST THE TOP FIVE OBSTACLES OR PROBLEMS THAT YOU FACE: (Numbered 1-5)
- Section: **Situation**
  - 1. A typical day in the life of your persona
  - 2. A typical interaction with your product
  - 3. A perfect day
- Section: **Top of Mind Issues**
- Section: **Other Information** (What they read online and offline; member associations)

- Use the Pragmatic Institute persona worksheets to help define your target persona segment(s) for your in-depth interviews
- If you have some created already, great! Make sure they're updated and relevant for your interview endeavors
- If not, use the template to document your ideal interview candidates
- Use these to communicate your targets with other people on your team and get their input
- For the purposes of in-depth interviews, it may not be necessary to complete the worksheet ... only focus on the parts that help define the segment of personas you are targeting

# Techie Co. Personas

## OLIVER

---

<b>Title:</b>	<b>Owner and President</b>
<b>Company:</b>	InnoMark Digital (a marketing agency)
<b>Age:</b>	47
<b>Technology Aptitude:</b>	Average
<b>Technology Used:</b>	Excel, PowerPoint, Email, Quick Books, a digital asset management system, social media apps, Mac computers, iPhone, Apple Watch
<b>Top of Mind Issues:</b>	<ul style="list-style-type: none"><li>• Keeping his clients happy</li><li>• Running a profitable business</li><li>• Working on what he likes to do best ... using his creative skills</li></ul>

---

## CHARLES

---

<b>Title:</b>	<b>Chief Financial Officer</b>
<b>Company:</b>	GardensForYou.com (E-commerce retailer of high-end garden supplies)
<b>Age:</b>	35
<b>Technology Aptitude:</b>	Advanced
<b>Technology Used:</b>	Excel, Word, PowerPoint, Outlook, Microsoft Great Plains, Windows laptop, iPhone
<b>Top of Mind Issues:</b>	<ul style="list-style-type: none"><li>• Maintaining the profitability and cash flow of the company.</li><li>• Driving out unnecessary costs and reducing errors that create costs.</li><li>• Making sure vendors are delivering valuable service for the money being paid.</li></ul>

---

## SAM

---

<b>Title:</b>	<b>Vice President of IT</b>
<b>Company:</b>	A-Plus Signs (custom plastic sign manufacturer)
<b>Age:</b>	44
<b>Technology Aptitude:</b>	Advanced
<b>Technology Used / Supported:</b>	Application software, networking equipment, servers, laptops, firewalls, phones
<b>Background:</b>	Sam manages all of the IT for the company, including internal applications, servers, storage, file systems, networking, communications, desktops and laptops. He likes being the jack of all trades in IT, and loves developing and deploying new technology that helps the business.

---



## Benefits of defining target personas for in-depth interviews

- ✓ Easy format for you and your team to discuss who you're looking to talk to
- ✓ Enables you to identify meaningful and actionable trends in respondents answers in the interviews
- ✓ Will bring deeper understanding to a persona's "day in the life" after you've interviewed a bunch of them
- ✓ Helps keep the interview guide focused (see Week Three)



# Your Week Two Assignment

- Share or develop at least one persona worksheet
  - Can be worksheets you already created, whether they were used as input into in-depth interviews or not
  - Or, create a new one if you're embarking on an in-depth interview project soon
- Post to the Discussion Group by Monday January 25 at 12:00 PM Pacific
- Review at least one other member's persona worksheet(s) and provide comments/feedback



# Thank you and have fun!

