

Example of a Process (Actual size is 8 1/2"x11")

The example below demonstrates the amount of detail included to ensure that you can apply the information to your specific project. Every step is numbered so you can follow the right sequence. The example below has been reduced in size from its original 8 1/2 X 11". It is one of 15 fully documented, step-by-step processes in the e-Guide

Detailed Process: Develop a Persona

1

DO THE PROPER RESEARCH

For example:

- Interview customers.
- Do a proper market segmentation.
- Prioritize your key customers.

This step requires analysis, research, and thoroughness. It is not trivial.

Also avail yourself of current market research and use it to help define your persona. Talk to your distribution channels and ask them questions about the typical customer. Read material in the trade press, which may provide additional insights into the persona.

A PERSONA IS CRITICAL TO YOUR DESIGN AND MUST NOT BE TAKEN LIGHTLY.



Developing a persona requires due diligence; i.e., the proper research. Avoid the "ad-hoc" approach. You must dedicate time and effort to this endeavor.

All process maps also include important additional information to help you apply the process with confidence

2

DESCRIBE THE PERSONAL TRAITS

Describe the personal traits of your persona.

This is a list of the attributes that will clearly profile your persona. Ensure that your description is unique, not a one-size-fits-all. Each persona has to be clearly different from others.

Include your team in this step. This is a collaborative effort, plus the combined knowledge of your team will be very valuable.

Every step is sequentially numbered so your team does not have to guess

3

DOCUMENT YOUR PERSONA

Now is the time to fill in the blank with the research information.

Keep the description of your persona to a manageable size, perhaps a few pages; avoid very long documents.

Do not put details that add little or no value. It is tempting to add characteristics that are not relevant.

Always include the goals of your Persona; that is, what she is trying to do or accomplish. Include your team in this step.

4

DEVELOP YOUR COMMUNICATION PLAN

Define who will use the persona, and set about developing a plan for clear communication; for example, call a meeting to introduce your persona, or write a "profile" on your persona and distribute it to all your team members. Be whimsical — create a "real" person for your persona by adding graphics to your description.

5

DEVELOP THE PROTOCOL

Write a set of instructions on how to use your persona. For example, use personas to develop cases and scenarios. Provide guidance to your team so they get the maximum benefit from using the persona.

6

USE AND IMPROVE YOUR PERSONA

Start using your persona, and at the same time start improving its quality by creating flyers, posters and other handouts to help your team. Improve the profile with new information as you get it. Keep "training" your team on the use of personas.

Note that the information is in "plain English" to enable immediate implementation on your project

Example of a Template (Form) (Actual size is 8 1/2"x11")

This is a form to use when defining the sample selection for a series of customer interviews. This is one of four different approaches contained in the e-Guide on sample selection.

The example below has been reduced in size from its original 8 1/2 X 11". The example below is one of 13 templates in the e-Guide

Every Template (form) has a hyperlink, you simply "click" and you are transferred to an actual form. You can now share the completed template with your team around the world



Example: Decision-Making Tree

Fill in the blanks for a given market segment or group of customers. Represent the 80 percent case, not perfection, as there will always be exceptions.

Market Segment or Customer Group: _____

Internal Influences

Anyone or anything within the customer's organization that can influence the purchase decision.

Final Approval

Person who has control over funding.

External Influences

Anyone or anything outside the customer's organization that can influence the purchase decision.

The Quality Manager

The Business Unit General Manager

Our main competitor, "Acme Electronics"

The business unit Financial Manager

Key Decision-Maker

Usually the person responsible for the budget, head of the department or other type of senior manager.

The industry standards organization

The Engineering Managers who work for the VP of Engineering

The VP of Engineering

Government regulators

End Users

The problem-owners.

Technicians Level 1

Technicians Level 2

Every template (form) has a fully developed example to help you better understand its application

Example of a Tool (Actual size is 8 1/2"x11")

This is one of 16 powerful tools contained in the e-Guide. Every tool is fully explained, plus a completed example is included. Note that there is also a template (form) where you can enter your own information.

The example below has been reduced in size from its original 8 1/2 X 11"

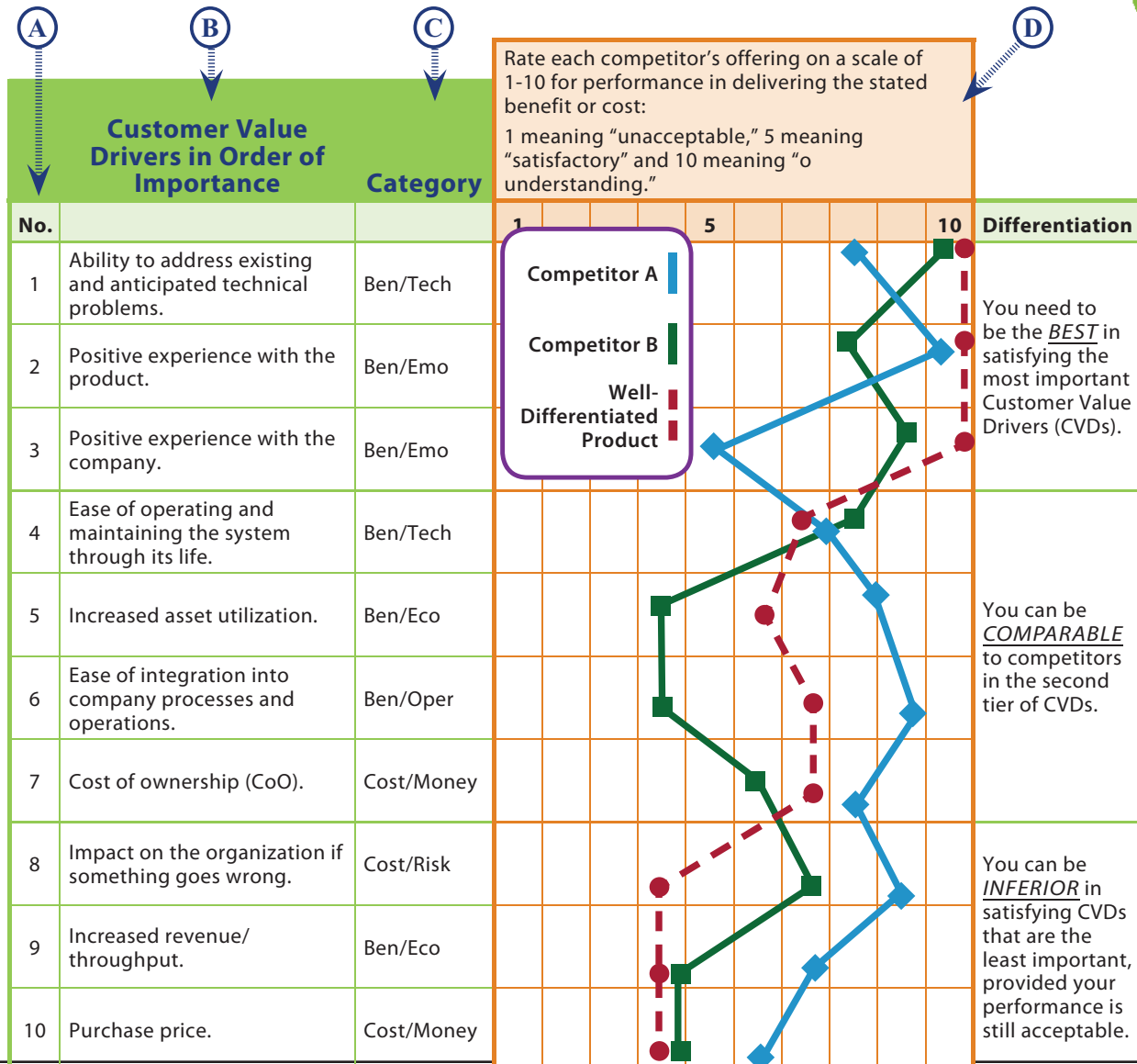
Every item in the tool is fully explained to enable you to use it in your project. No need to "guess" or interpret what the author meant.

Every tool and every template has a hyperlink, you simply "click" and you are transferred to an actual form.

You can now share the form template with your team around the world



Example: Product Value Profile



Fully Developed Examples (Actual size is 8 1/2"x11")

This is one of 20 fully developed examples contained in the e-Guide. Every example is extracted from real experience — not hypothetical.

The example below has been reduced in size from its original 8 1/2 X 11"

For every example there is a corresponding template (form), which is fully fillable and you can share with your team around the world.

You can actually enter your information in the form and then share with your team.

Example: The Four Critical Questions

Question	Examples			
Who The title or function of the person to interview (profile).	Engineering Managers	Engineering Team Leads	VP of Engineering	Director of Engineering
How Many The number of interviews for each of the categories.	3	4	3	3
Venue The forum you have selected to conduct the interview.	Trade show meeting	Trade show meeting	Their offices	At the next meeting of the IEEE in New York
Cross-Section The segments or groups from the chosen market.	One from small manufacturing	Two from small manufacturing companies Two from small software companies	One from a small manufacturing company One from a medium-sized, software company One from a multinational company	Three members of the IEEE, software division

Figure: Mapping a set of customer interviews.

The above diagram depicts one way to ensure that you have covered all the critical variables for a set of customer interviews. In the example above we have mapped 13 interviews, which is on the high end in terms of the number of visits. You can scale the above template to serve your specific purposes. The crucial element is to cover the four critical questions. There are other templates to map customer visits later in this e-Guide.

All examples are "real", they were derived from actual development projects.

This helps you realize the true application of the tool or template