Purchase Cycle

Lisa

"I don't have time to shop around!"

Personal

Age: 39
Live in GTA
Single
PhD Candidate
Know the web
Runs 10 km a day
Knows what she wants

Occupation

- Is tenured professor at a University
- Dos commute to work
- Her iPhone is her life
- 9 Years in present position
- Continuously needs to expand knowledge base
- Enjoys teaching new students

Goals and Attitudes

- There is never enough time in a day
- Needs a solid constructed vehicle
- Not too concerned about brand
- Fuel economy is key
- Likes to test drive many vehicles
- Prefers the lease over finance

Context of Use

- Research begins 6 months into cycle
- Surfs the net to price/build
- Likes shopping online as well
- Looking forward to her upcoming sabbatical
- Likes to review 3rd party sites
- Dealership visits

Purchaser Persona: Triggers, Tasks & Scenarios

Triggers that bring customers into dealership

- Lease is due
- Current car is old
- Current car having mechanical issues too expensive to fix
- Car accident and need a car right away
- New job with company car
- New job requires car travel
- Family addition – need bigger car
- Need smaller car
- Reducing fleet
- Rented a Toyota on holiday and liked the way it drove

Tasks

1. Return to preferred dealership
2. Talk to trusted Product Advisor
3. Establish good price, lease, finance terms
4. Bring price and build information from website
5. Ensure extra features will be available
6. Test driving is a must but brief
7. Lease for 4 years

Michelle / Patient Advocate (Secondary Persona)

Michelle

"No one else is looking out for my father"

Context of Use

- Uses high speed connection from and work
- Goes to clinic appointments with her father
- Talks to healthcare professionals to learn about treatments, diet, supports for her father
- Has to speak for her father, he is reluctant to discuss his illness with anyone

Personal

52
Married
3 children, 22, 26, 29
2 income family
University degree
Lives in Mississauga
Healthy
Advocates for her father who has Crohn's disease

Occupation / Hobbies

- Senior manager investment firm
- Active computer user (2-5 hrs daily)
- Enjoys reading for recreation
- Likes to cook
- Family oriented

Goals and Attitudes

- Wants to ensure her father is getting the best care
- Wants to understand Crohn's to try to keep her sons healthy
- Likes to be well informed
- Worries about her father's health

Patient Advocate Persona: Triggers, Organisational Goals, Tasks

Triggers to go to site / Symptoms

- Heard about Foundation through RISE posters at doctor's visit with her father
- Took brochure for CDHF

CDHF organisational goals:

- Enable patient advocates to find expert information to refer loved ones to or to download and provide to loved ones
- Persuade patient advocates to donate to CDHF in honour of their loved ones

Tasks

1. Enters CDHF in browser; arrives at site
2. Sees call to subscribe to Expert Digest and signs up for this to be delivered to her home
3. Looks for "Crohn's disease" as a heading
4. Looks for anything that might be for "caregivers"
5. Will return to site to look further after visits to the doctor with her father to understand more about terms used
6. Checks for tips, recipes
7. Checks to see how disease progresses in older people

Jean) Individual Donor

"Around the holidays you're spending more, and you become aware that some people have nothing,so it feels good to give back."

Goals and Motivations

- Interest peaks during holiday campaigns.
- A stay at home mom who volunteers with friends.
- Becomes saddened for those who have nothing when shopping for family.
- Uses website to read up on information to get involved or make a donation.

Age: 46

Status: Married, with 3 kids

Education: Post-secondary

Skills: Good computer skills

Experience: Use the website to read about what's been going on at Daily Bread, and to make donations several times a year.

Holiday triggered   Talks to other moms

Feeling good   Involved

Volunteers in community

Always on the go

Context of Use

Akēndi

13

Persona: Brad; Vendor

"...I need to generate traffic at my booth..."

Brad -- Vendor

33 years old. Brad is sales strategist at a computer network solutions shop. He has a background in sales and marketing and has spent 8 years working up to his current position. A few times a year, he is sent out to man his company's booth at technology conferences

Frequency of use: Frequent use while manning vendor booth, 8am-6pm

Motivation: High
Brad must demonstrate to his company that their presence at the conference has generated enough leads to justify the rental fee for the exhibit booth space

Experience: Brad is not the most technical guy in the world, but has a thorough understanding of the networking solutions and services he sells. He is familiar with social networking sites such as LinkedIn and facebook and is aware of their potential for marketing and sales. He carries his Blackberry just about everywhere he goes

What are his goals?

Brad must generate traffic at his booth during the conference. Before the conference, he establishes leads online, researching attendee attributes so as to target the right people in the right way. During the conference, Brad entices potential customers to visit the booth. He also tracks the contacts made during the conference and gathers demographics on the people who visited the booth

What is his context?

Brad is tied to his booth in the 'common' area with the rest of the vendor booths. This is often a large, open and noisy environment where many people are walking around and talking. Brad sits or stands behind or in front of his booth and strikes up conversation with people who come by. He usually mans the booth with 1 or 2 of his coworkers. He has a laptop that he uses to projects information about the services offered by his company. Usually he gives away "swag" such as pens or mugs adorned with the company logo

Persona: Frasier; Online Marketing Expert

"...I pretty much do it all – from creating the design to getting the campaign out the door..."

Frasier -- Online Marketing Expert

27 years old. He has a university education but his degree is not directly related to his role. Frasier is very tech-savvy and enjoys playing around with technologies that will help him achieve his goals.

Functional Limitations: None

Frequency of use: about 3-4 times per month

Motivation: High
Frasier is naturally curious and has a tendency to push the limits of the products he uses.

Experience: Frasier has been in his current role for about 2 years, and is enjoying the challenges.

What are his goals?

Frasier is focused on creating email marketing messages which drive more visits to his company's website. Michael is the person responsible for the creative content and getting the campaigns "out the door".

What is his context?

Frasier works for a medium sized CRM organization. He tends to work on his own and spends a lot of time creating marketing messages, obtaining approval from management and then modifying his messages based on their feedback.
Frasier does much of his design work on a Mac.

Persona: Hassan; International Candidate

"… I'll do whatever is necessary to make the system work for me…"

Hassan -- International Candidate

35 yrs old. Hassan is a licensed physician trained in Afghanistan, currently working in a hospital in Kabul. Limited English and poor technical skills make using MCC Online and PCRC Online intimidating. However, Hassan is intelligent and resourceful and is confident he can make it through the system

Functional Limitations: Weak English skills; requires some hand holding because he is unsure about what information he must provide

Frequency of use:
1st month of use: every other day
During each of 3 exams cycles: weekly to monthly
Remainder of career: ad-hoc use

Motivation: High
Hassan's main goal is to get out of his home country. Being able to practice medicine is secondary to finding a better life in Canada. He is willing to adapt to rather than complain about a problematic user experience

Experience: Hassan has been practicing medicine for about 10 years, including 4 years of residency. He specializes in pediatrics

What are his goals?

Hassan is trying to become licensed to practice medicine in Canada. He must use PCRC Online in order to have his credentials verified so he can write the MCC exams. He uses MCC Online to schedule, pay for, and view his results on the Evaluating Examination and QE Parts I and II, in order to obtain his LMCC

What is his context?

Hassan accesses MCC's systems from home on his own time. A different time zone, unreliable phone lines and old computer equipment increase Hassan's difficultly in communicating with MCC. He must follow legal procedures for certification, follow detailed steps for translation, and enter a lot of data in a particular way. It is difficult to do the traveling necessary to get his documents certified and translated. Because of cultural differences, Hassan is more comfortable speaking with a male rather than a female agent

Persona: Maria; Service Desk Operator

"...I truly want to help people efficiently and effectively..."

Maria -- Service Desk Operator

37 years old. Maria has a BA in Sociology and many years of work experience in customer support. Her computer knowledge is rather weak, but she knows her way around MCRS/PCRS. She has broad knowledge of MCC processes but doesn't necessarily know the detailed ins and outs. Maria is fluent in both English and French

Frequency of use: Frequent use throughout the day

Motivation: High
Maria truly wants to help the candidates she services. She wants and needs to service her customers quickly; however, she often finds herself struggling to make the software work for her and so her tasks take longer to complete than they should

Experience: Maria has been in this role for 8 months

What are her goals?

Maria supports candidates as well as business/credential agents in handling routine inquiries. She scans physical documents received from candidates into the system so that agents may access the data. She spends the rest of her time fielding questions from candidates via phone and email and providing production support when necessary

What is her context?

Maria spends most of her 8am-4pm shift in her cubicle, but a team environment means that she frequently consults with other Service Desk Operators. She frequently receives phone inquiries from candidates throughout the day. When using PCRS, she uses her secondary monitor to view document images. Maria must abide by security protocols for dealing with personal candidate information