

Heap How to Create Behavioral Personas Instruction Manual

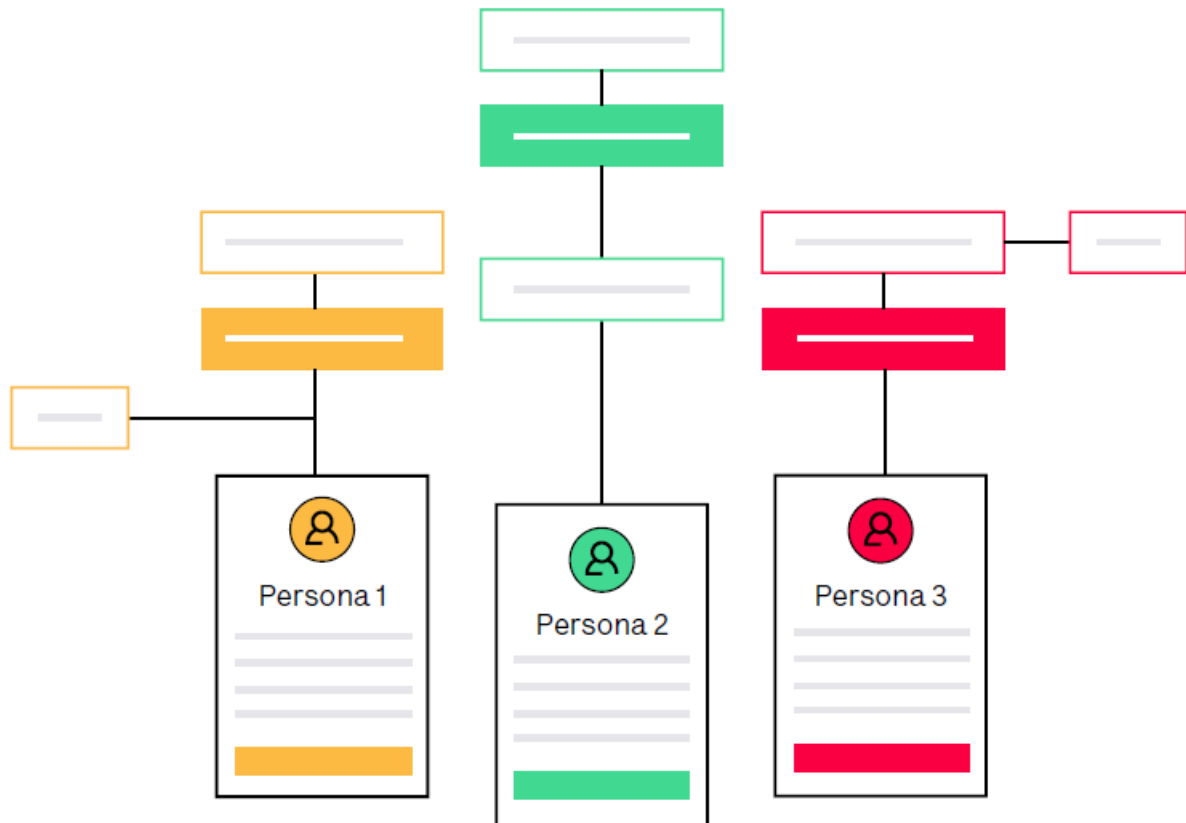
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Heap How to Create Behavioral Personas



Product Information

The product is a guide that provides instructions on how to create behavioral personas for a business. It is designed for users who have already taken the first two steps to becoming data-driven. The guide is intended to help businesses identify key personas based on how users interact with their product or site. The guide recommends an iterative approach and provides a worksheet for users to use with their team.

Product Usage Instructions

Step 1: Brainstorm Key Behavioral Personas

The first step is to organize a brainstorming session with your team to come up with potential behavioral personas that make sense for your product and business. Behavioral personas are groups of users defined by similar usage of your product or site. Users will naturally group themselves according to behavioral patterns, such as administrators, power users, occasional users, and inactive users for SaaS products. For eComm products or sites, visitors may fall into frequent shoppers, infrequent spenders, window shoppers, visitors who come to purchase a certain segment of your offerings, and so on. The goal is to identify which categories make the most sense for your business.

Step 2: Create Key User Personas

After brainstorming potential behavioral personas, the next step is to create key user personas. These are groups of users that are organized by behavioral attributes – how they act in your product or site. This step builds on the segmentation process started in step 2 and ties it to your business goals. The goal is to focus more accurately on who you're building for and why, moving from using data to track activity to using data to guide decisions.

Step 3: Use the Attached Worksheet and Iterate

The guide strongly recommends using the attached worksheet with your team and encourages an iterative approach. Start putting these groups together, then hone and improve. By creating key user personas around

primary use cases, many teams end up finding key use cases or groups they hadn't been paying enough attention to.

How to Create Behavioral Personas

If you're reading this guide, it probably means that you've already taken the first two steps to becoming data-driven. (If not, please download our guide to measuring feature success and our guide to segmenting your users. They're the best places to start.)

Now it's time to start identifying the key personas for your business, based on who uses your product and how they use it.

Why is this the best next step for becoming data-driven?

- Well, in step 1 you started bringing data into your team's workflow by measuring something you've already released. Then in step 2 you started setting up standard dashboards to assess how different groups of users respond to changes in your site or product.
- In this step you'll create key user personas. These are groups of users that are organized by behavioral attributes—by how they act in your product or site.
- In some ways this is the logical next step from step 2. In this step you'll be building on segmentation you've begun, and start tying it to your business goals.
- This lets you far more accurately focus on who you're building for and why. Which is the real goal of becoming data-driven: to move from using data to track activity to using data to guide decisions.
- Another benefit: when they create key user personas around primary use cases, many teams end up finding key use cases or groups they hadn't been paying enough attention to.
- As with all of our guides, we strongly recommend using the attached worksheet with your team. We also encourage an iterative approach. Start putting these groups together, then hone and improve.
- Let's get started!

Brainstorm key behavioral personas

The first step isn't quite data-based. Rather, it's to organize a brainstorm with your team to come up with potential behavioral personas that make sense for your product and business.

What are behavioral personas? They are:

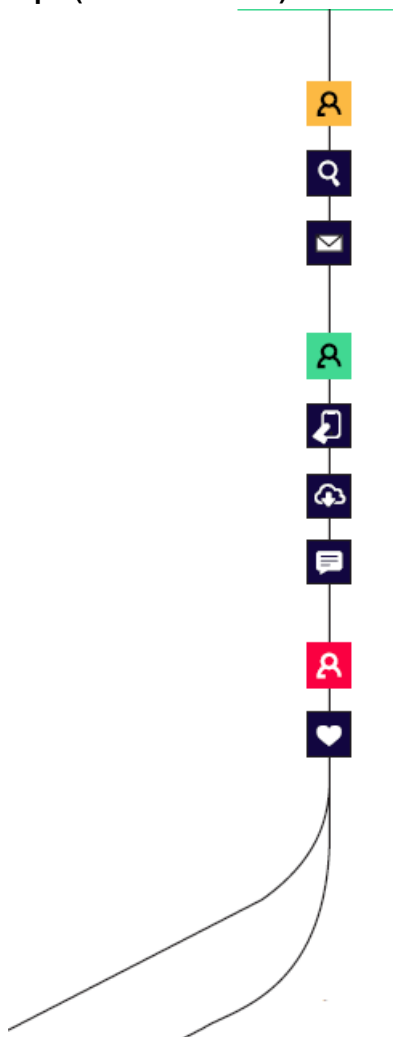
Groups of users defined by similar usage of your product or site.

- What do we mean? Well, in most products or sites users will naturally group themselves according to behavioral patterns. For example, in many SaaS products there are administrators, power users, occasional users, and inactive users. (This is not at all an exhaustive list.)
- For most SaaS products, the goal isn't to have 100% of users fall into the "power users" group.
- Often you might want 30% of users to be power users, and the other 70% to be occasional users.
- Similarly, in eComm products or sites, while the ultimate goal might be to have all visitors be high-spenders, it's far more likely that visitors fall into a few different camps: frequent shoppers, infrequent spenders, window shoppers (people who visit often but don't often purchase), visitors who come to purchase a certain segment of your offerings, and so on.
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Map behaviors to your persona groups (in a brainstorm)



- Now that you've started to figure out what groups matter most to
- your business, it's time to map them to actions in your product. In our experience doing this requires some iteration — finding the exact number and type of actions that define each group can take a little bit of work. (It's worth it.)
- The best way to do this iteration is to start by hypothesizing. After we do that, we'll look at the data to see how well it conforms.
- Start with the actions you identified in our guide to segmenting your users. What are the actions that most define getting value in your product? Then start figuring out if those are the actions that matter for each group.
- Next, look at frequency. Often behavioral personas are distinguished not by the actions they perform, but how frequently they perform them. While you may want power users to run reports every day, occasional users

es groups are best defined by inclusion and exclusion. Are there groups you might expect to do action
t action Y?

ve encourage hearty discussion and disagreement.

- ## Look for differences between groups

- Now that you have behavioral personas, it's time to start looking for significant differences between user groups.
- There are many ways to explore this data. Differences could lie in the ways people find the actions they're interested in. High-value shoppers may read more reviews (or leave more reviews!).
- In Fintech, you might define your power users as those who complete X number of transactions. Start asking questions about other, correlated behaviors. Do those power users tend to engage more or less with your financial calculators?

- You can also start bringing in demographic data into your groups. (You don't want to start with demographic behavior – it's far more important to start with the behaviors you care about, then to see if demographics play a difference.) Maybe certain types of shoppers are women, or tend to fall within a certain age bracket. In SaaS, maybe job title correlates well with frequency of certain actions.
- As you identify overlap between personas, you may want to restructure your user groups, combining similar groups or adding new ones based on any significant behavioral patterns that you discover as you ask more questions.

Moving between groups

If you're looking to increase a certain behavior, then you should look at the actions users would need to take to move from one group to another. For example, what do inactive users need to do to move from being considered "inactive" to becoming an active user?

Set up dashboards

Set up dashboards for your identified personas to follow their behavior over time. Watch and learn. See if the personas you've created perform the way you'd expected they would. How do changes to your product affect different personas differently? Do users tend to change their personas over time? If so, what factors seem to cause users to move from one group to another?

Creating Behavioral Personas

To learn more about how to create behavioral personas, visit [insert-url-here](#) to download our guide to this worksheet.

Use the following framework to first identify your user personas based on their product behavior and then track their performance over time against key milestones.

Step 1: Identify your main user personas

- Start by organizing a brainstorm with your team to come up with the key behavioral personas that would make the most sense to create for your product and business.
- Is it power users, inactive users, and infrequent users? Is it window shoppers, high-value shoppers, specific item shoppers? Something else?

This should be a brainstorm. Here's how it works:

- Everybody in the group writes down the personas they think make the most sense for the business (5 minutes)
- Discussion and alignment (20-25 minutes)

List the personas you end up with:

Step 2: Map behaviors to your persona groups (in a brainstorm)

Now, map those personas to actions in your product. Start with the actions you identified in our guide to segmenting your users. What are the actions that most define getting value in your product? Then start figuring out if those are the actions that matter for each group.

Persona			
Behaviors	-	-	-
	-	-	-
	-	-	-

Next, look at frequency. How often do different groups of users perform the actions that you've identified as meaningful in your product?

Persona	Action	Frequency

Step 3: Map behaviors to your persona groups (with data)

- Now, dig into your data. The goal is to end up with 3-5 behavioral groups.
- Start with the hypotheses you made in Step 2. Now look at the data and see how well the data correlates with your ideas.
- The goal here should be to find distinguishing characteristics that separate groups from one another. Does doing an action 6 times in a week make someone a power user? Or 7?
- This will likely involve some discussion and iteration. That's ok.
- When you're done, list the personas here. This will be your master list!

Persona	Definition

Once you have a sense of the behaviors that distinguish each group, check the proportions with the hypotheses you made when brainstorming your personas in Step 1. You may need to modify the groupings you created in the

previous step.

Next steps

If you have time, you can start digging into the differences between groups.

Demographic data:


Consider bringing in demographic data into your groups. How do demographics influence different personas' behavior?

Persona	Key Demographic Data

Moving from one group to another

If you're looking to increase a certain behavior, then you should look at the actions users would need to take to move from one group to another. What actions would users need to take to move from one persona group to another?

Personas	Persona 1 → Persona 2	Persona 2 → Persona 3	Persona 3 → Persona 4
Actions	-	-	-
	-	-	-
	-	-	-

	<p>Heap How to Create Behavioral Personas [pdf] Instruction Manual</p> <p>How to Create Behavioral Personas, Create Behavioral Personas, Behavioral Personas, Personas</p>
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References

- [Heap - Better Insights. Faster. | Heap](#)