

CASE STUDY

Proto-Personas: Defining Your Customers Using a Limited Resource Approach

Overview

Delivering great customer experience (CX) is at the heart of every successful company, regardless of size or industry, and understanding customer emotions and needs is essential to creating a winning product or service. Superior CX is a key product differentiator that drives sales, satisfaction rates, and overall customer retention. However, building a successful CX strategy can be challenging, especially when an organization lacks dedicated resources.

Proto-personas use a pragmatic research approach and require a limited amount of resources to help teams understand prospective customers' perspectives. Today, fewer companies use proto-personas, mistakenly viewing them as an invalid, unreliable source for gauging customers' emotions. In fact, proto-personas can provide useful insight into your customer base.



What is a Proto-Persona?

A high-level picture of the target user based on assumptions, anecdotal evidence, and experience. It helps:

- Create a baseline to align upon and refine as a project progresses.
- Build empathy and establish goals and pain points, especially if you're pressed for time or resources.
- Allow CX teams to make educated business decisions, keeping the customer in the forefront of every update, improvement, or recommendation.

Proto-personas can evolve into full personas by conducting additional user research. Building out a full persona includes:

- A deep dive into potential users by forming a hypothesis based on research.
- Traditional research to assess actual user thoughts and feelings to establish a more focused collection of goals and pain points and validate stakeholders' views.

Although you can learn more from full personas, they take significantly longer to complete, and require more resources.

Nelnet used reliable proto-personas to aid the launch of [Nelnet Renewable Energy](#), a new venture. To enter this market quickly, while limiting our initial investment, a proto-persona was the most timely and effective option to help better understand prospective customers.

Process

The following steps were used to create “Carmen Jones,” a proto-persona for Nelnet Renewable Energy’s community solar subscription.

Conduct Research

Standard Process	To Create Proto-Persona Carmen
1. Gather sources, such as stakeholder perceptions and opinions, market research, and subject matter expert (SME) input.	We contacted SMEs from sales and marketing, and experts who had done upfront market research on community solar.
2. Conduct research, using activities like workshops and interviews.	<p>We held a workshop with the following agenda:</p> <ul style="list-style-type: none"> • Benefits of personas. • What is a proto-persona? • Workshop purpose. • Brainstorming. • Spectrum profiling. • Identify attributes. • Share and discuss. • Wrap-up and next steps.

Analyze Research

Standard Process	To Create Proto-Persona Carmen
1. Analyze and categorize information.	We gathered and analyzed the information from workshops and proto-persona interview responses.

Standard Process	To Create Proto-Persona Carmen
2. Establish basic demographic data.	<p>For Carmen, we determined she:</p> <ul style="list-style-type: none"> • Is female. • Is between the ages of 55 and 75. • Works as a director. • Lives in the suburbs. • Has an average household income \$100,000.
3. Establish other demographic data, beliefs, and attitudes, as needed.	<p>Carmen is:</p> <ul style="list-style-type: none"> • Worried about the upfront costs of solar energy. • Concerned about the long-term commitment. • Environmentally conscious. • Someone who relies on friends for advice. • Wanting to reduce energy cost. • Wanting to reduce carbon emission.

Create Proto-Persona

The final step is creating the actual proto-persona: a visual representation of key information, including goals, pain points, attitudes/beliefs, and demographic information.

Occupation: Director
Age: 49
Gender: Female
Home Residence: Suburbs
Marital Status: Married
Household Size: 3
Income: \$100,000

Carmen Jones

“Progress is impossible without change, and change is needed now to preserve our environment.”

Goals	Challenges	Actions	Influencers
<ul style="list-style-type: none"> • Simplify life • Concrete return on investment • Reduce energy costs • Help the environment • Fossil fuel/carbon reduction • Moral satisfaction 	<ul style="list-style-type: none"> • Is signing up a complicated process • Moving to a new residence • Account holder death (what happens) • Affordability up front • Company credibility/transparency • Understanding renewable energy options • Understanding solar energy processes • Contract length and terms/conditions 	<ul style="list-style-type: none"> • Internet research • Ask friends/colleagues • Contact utility company • Attend community meetings 	<ul style="list-style-type: none"> • Coworker/company involvement • Concern for the environment • Community activism • Cost savings

Figure 1. This is Carmen Jones, Nelnet’s completed proto-persona for Nelnet Renewable Energy.

Results

The development of proto-personas was essential for the launch of Nelnet Renewable Energy. It allowed our teams to:

- Empathize with potential customers.
- Develop a strategic plan that focused on creating the best user experience (UX) possible.
- Lay an influential foundation for future research-based persona development within Nelnet Renewable Energy.
- Identify the basic demographics of our prospective customers and use those to help understand their thoughts and emotions when interacting with our product.

Conclusion

Proto-personas characterize customers and support strategic planning, while minimizing resource use. They drive influential business decisions with superior CX in mind. The secondary data collected for this type of persona is grounded in research, and establishes a valid, reliable foundation that can later be compared to primary research. With a proto-persona in hand, you might consider developing a journey map next. A journey map depicts a persona's experience completing a particular goal and reveals additional CX insights.

Proto-personas (and journey maps) build shared understanding and vision, and thus, help improve CX. As we've explained here, proto-personas are within reach of even organizations with limited resources. Fragmented understanding is a common setback for teams, and journey mapping supports creating a shared vision.

The success we've achieved with Nelnet Renewable Energy is just one of the ways Nelnet is leading by example. Visit nelnetinc.com/nds to learn how partnering with us can help transform your business.