

# Tamara Adlin: adlin, inc.

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*“If you consider a persona a character, then the experience you want to create is the story.”*

—Tamara Adlin

**W**hat a user sees and experiences when he visits your web site is part of the marketing of your site. If the user has a bad experience or receives an inconsistent brand message or just doesn't like what he sees, that negates all the other marketing you've done up to that point. That's why, as a marketer, you need to pay particular attention to the customer experience.

Tamara Adlin knows all about the importance of the customer experience. Her company, adlin, inc., specializes in customer experience consulting; before founding her own firm, she worked on the customer experience services team at Amazon.com. Tamara is an in-demand speaker in the field of customer experience and co-authored, with Microsoft's John Pruitt, a popular book on the topic, *The Persona Lifecycle: Keeping People in Mind Throughout Product Design* (Morgan Kaufmann, 2006).

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## Creating a Customer-Centered Experience with Personas

As you can tell from the title of her book, Tamara likes to focus on what are called personas. A *persona* is a representation of your target customer, not a bulleted list of demographics and psychographics—a person with a name instead of a collection of data. By focusing on a persona instead of statistics,

Tamara helps companies fine-tune their efforts for real people. The result is true customer-centered design, which should be an extension of any firm's online marketing efforts.

### **You're running your own consulting firm now, but you used to work for Amazon—how did you get to where you are today?**

Even back as far as when I was an undergrad, I was very interested in both art and how people perceive things. Over the years, that naturally somehow progressed into an interest in how people interact with systems. So I went from how people perceived art to how people perceived systems, and that evolved into an interest in human-computer interaction—and that's been the focus of my career.

I then went on to get a master's degree in technical communication, because that's all there was at that time for people interested in what I was interested in. Then I did a bunch of startups here in Seattle, and eventually ended up at Amazon, in their user-centered design group.

*“[F]ocus on who it is and what they're trying to do, and then you can focus on how you answer that need.”*

At Amazon I had two different jobs. The first two years were consulting within the company to all the different teams who were designing different aspects of the Amazon.com web site. Then in the third year they asked me to start up a customer-centered design team for other retailers who were interested in using Amazon's technol-

ogy. That's an initiative they had, so there's a white label version of the Amazon technology that would look like a particular brand's web site. For example, Diane von Furstenberg moved to the Amazon platform, and Target.com has used the Amazon platform for many years. I was a part of the team that would work with those online retailers, to help them figure out which aspects of the Amazon technology would work best for their customers and their brands.

### **Let's talk about what you're doing now. How can you help a site improve their customer experience?**

I do a couple of things. I think what I'm best known for right now is helping clients really narrow in on exactly who they're trying to please, from a customer perspective, and exactly how they're trying to please them.

With a partner, John Pruitt from Microsoft, I worked for about five years to create a book called *The Persona Lifecycle*. It's all about how you create customer focus on an ongoing way in an organization. The customer focus should start with the executive team and be clear all the way through the organization and product-development process, and even transferred over to documentation, support, fulfillment, and all customer touch points.

The way I help primarily is way, way upstream, in trying to get the executive team and major stakeholders super-articulate about their customers. Usually that takes the shape of customer personas, which are based on customer goals. So instead of having a segment, like 35- to 45-year-old women who live in the suburbs, which is very hard to design a product for, you have Maryanne.

*“I believe success comes from banning the words ‘user’ and ‘customer’ from your organization, because I don’t believe they’re specific enough.”*

Maryanne is 37 and lives in Bellevue, which is an upscale suburb of Seattle, and she has two kids and very little time for shopping anymore, and so on and so forth. Her goal for this kind of purchase—which is, let’s say, cleaning supplies—is she doesn’t want to shop around a lot; she wants to get it done and get out. You really focus on who it is and what they’re trying to do, and then you can focus on how you answer that need—and how do you answer things beyond that need that Maryanne might not even know she can ask for.

### **How do you go about defining a persona, based on a company’s customers?**

There are several different ways. One way is to do a bunch of research and talk to a bunch of customers, and then to create personas. Many consulting groups do that, and then present finished personas to the organization.

I have a different approach—in fact a very different approach. My belief is that the real magic of something like personas is in getting consistency of focus across an organization. To my mind, it’s more important to make sure that the stakeholders and executives are involved in the persona-creation process than it is to collect a lot of extra data. So instead of starting with data collection, I start with what we call “ad hoc persona workshops.” These

require everyone who's anyone in the organization to get together in a room and get all their assumptions about customers out on the table, to get them super clear on what their business-, brand-, and customer-related objectives are, and go through some workshops where they move from these assumptions about who their customers are to very clear goal-oriented descriptions of ad hoc personas. Inevitably a lot of questions arise during these workshops; there's a lot of discussion about which persona should be prioritized based on market share, frequency, or even differentiation. And then you go out and find data to answer those questions.

That's the way I approach it. I believe success comes from banning the words "user" and "customer" from your organization, because I don't believe they're specific enough. I'd much rather see everyone in an organization going around and saying, "We want to create this feature for Maryanne, but we're spending a lot of time on this other feature for Bobby. Don't you think we should change our focus back to Maryanne, because we prioritized her?"

To me, that's success, because that laser focus on a very well-understood customer is absolutely magical in an organization.

### **Do you find, when you first start working with a company, that different people have different images of who the customer is?**

Oh, a hundred percent—and they think they're all on the same page!

What often happens when I start working with a customer is they say, "We really do have a strong idea of who our customers are, so we may not need to go through this." And the truth is, even if they do have a shared concept of who their customer is, which they don't—they never do; they think they do, but they don't—the word "customer" can mean a different thing every day.

Alan Cooper was the one who originally came up with the idea of personas, and he calls that "the elastic user." If you ask me today who I think the suburban mom is and tomorrow who I think the suburban mom is, I might have very different answers, depending on the context.

To answer your question a little more clearly, if you send out an email asking everyone—stakeholders and executives and people throughout the organization—to describe three example people who embody their true customer base, you would be absolutely shocked at the variety that you get back. Almost never are those descriptions based on people's goals and objectives. Usually they're based on demographics or psychographics or

behavior online. Goals are much more interesting and helpful when you're designing a customer experience online.

### **So how do you reconcile the differences?**

You start out with how people in the organization are talking about users today. You have to get all of the assumptions out on the table if you want to change them. I always say that the only assumptions that can hurt your product are the ones you don't know about. Then, we use sticky notes—I would be out of business if I couldn't use sticky notes. Everybody in the room has to write lots of sticky notes, where each sticky note has one example person with a problem or in a situation that they think is important to their business—for example, a mom who doesn't want to spend a lot of time shopping for cleaning products, or a teenager who wants to get the latest ringtone.

Then we all get up and cluster the sticky notes. At first, they tend to cluster around the kinds of terms that have been floating around the company already, like “suburban moms” or “purchasers” or “SMB” or whatever. But then I force everyone to re-do the clusters and organize the stickies around “I want” and “I need” statements. Suddenly people in the company transition the way they're thinking about who their customers are. The exercise helps them transition from “old” ways of thinking about customers and users to thinking in terms of what their customers need and want, what their objectives are in their own terms. It really is a process of moving gently from one way of thinking about the customer to another way.

This is one of the reasons I think it's problematic to create these archetypal customers or personas externally from the company and then, for lack of a better way to put it, ‘throw them over the wall’. If key stakeholders haven't been involved in that process and experienced the transition from the ‘old’ terminology to the ‘new’ goal-based personas, it's too easy to fall back into the old way of doing things. It really is a process, and that's why I'm a big believer in going in and working with the team, face-to-face.

### **Is a persona the existing customer or is it the customer that you want to have?**

That's a great question. I think that it's a little bit of both.

When you create personas you create a set of them, and sometimes those sets of personas are a little bit of both. If an existing customer is one who's

just looking to get a rate plan online for their phone, let's say, that might be the customer you have today. But maybe your future target is somebody who already has a service and wants lots of extra features. I say that you create personas for both of those—they may end up being the same person in different stages of their relationship with the company—and then you prioritize.

When you prioritize, you prioritize from a future-looking perspective. Who do we want to get? Because, when you're doing a redesign process, whether it's small or large, you're looking to change something to enable you to appeal to a different aspect of your customer base, a different set of needs of your customer base, or a completely different customer base.

### **Once a company has defined its multiple personas, how does that translate into what someone sees when they go to the company's web site?**

You start with a persona that's driven by a goal—let's go back to Maryanne, who wants to buy cleaning products online because it's easier, and certainly doesn't want to spend a lot of time shopping for them. Then what I like to do is look first at the experience. If you consider a persona a character, then the experience you want to create is the story.

*“Too many companies just look at it page by page by page, so the site ends up being not so pleasant to use.”*

What I like to do is map out a story of her interaction with the site. So Maryanne shows up at the site, she's looking to just get the cleaners that she's used to getting and doing so quickly and making sure it's the best price, but she has a sort of “come-to-think-of-it” moment while she's at the

site and she looks at other cleaners. Right here we may introduce her to the idea that there are organic alternatives to the cleaners that she wants.

So you map out that interaction path that you'd like to create. Once you do that, then you can go back and decide how you're going to design that interaction path into the site.

I think that far too many companies just look at it page by page by page, so the site ends up being not so pleasant to use. A different team has designed the search results than has designed the product page than has designed the cart. So there's a jarring experience going from one to another.

Whereas if you look at the end-to-end interaction you want to create—almost as if it's a story—that can influence your design decisions very strongly.

You can even look at your site today from Maryanne's perspective and say to yourself, what would Maryanne do first, second, and third? Is that really helping her do what we want her to do? Are we telling her the right things at the right time? Let's

look at our competition's web site and see how well they're satisfying Maryanne, and whether there are things we can learn from them.

Then, like most customer-centered design people, I'm a big believer in starting with the blueprint of the site before going on to adding on branding elements or colors. I'm a believer in looking at the blueprint of the house and making sure that the kitchen isn't falling off the side before I go redecorate the living room.

It's about figuring out a way to go from a persona to the story you want to create to a way of creating a page flow or information flow that really supports that story.

*“I like to treat competitive web sites as version 1.0 of our redesign.”*

**You touched on something there. Most usability tends to be internally focused—what's happening on our site, what our users are doing. How do you bring what the competition is doing into the equation?**

Usability is becoming an overloaded term. When you look at the field that I'm in, usability really refers to usability testing, which is one aspect of what customer-centered design folks really do. Usability specifically refers to putting prototypes or designs in front of people and seeing how well people can actually use them: whether they're tripping over aspects of the design. Hopefully we do that early enough so that we can fix things before we launch them.

What I'm really interested in is much, much earlier in the process—way, way earlier, back in the strategy and conceptual phase. If you really do understand “we're going after Maryanne and not Bobby” from very early in the strategy phase, and you can look at what the competition is doing from

the perspective of the key customer that you want to go after, then you can learn from that.

I like to treat competitive web sites as version 1.0 of our redesign. What can we steal from them? What are they doing really well? What mistakes have they already made so we don't have to make them again? And this is before pencil hits paper on any kind of design decision.

If you create Maryanne and commit to her, you can get a lot of insight from looking at existing sites from her point of view. It will help you decide how you can be differentiated and what your value to Maryanne really is (compared to the other companies and services she can choose from). Once you clarify these things internally, you also have to find a way to express your value proposition and differentiators in a way that really does convey value and difference to Maryanne.

So it's way, way early in the process.

### **How do you measure success?**

Measuring ROI is a topic that people in customer-centered design are discussing; there's a lot being written about it right now, and a lot being thought about it. What I like to do, very early, when I identify the business goals and the branding goals and the objectives in respect to customers, is to write down how things are today and how we'd like them to be tomorrow.

*"I think customer experience should be a consistent focus in an organization."*

For example, there are process, product, and communication problems in any company. If you can write down the current problems related to each of these and how you'd like them to change, then you can measure success.

So in terms of the product, which could mean the web site, what are the problems we've identified with the web site today and are there symptoms we can point to that really display that problem? Are there metrics that are measuring that problem—and what do we want them to be? If you don't decide what you want to measure extremely early in the process, you can't measure it later.

That's my approach. I don't think it's just about moving the needle on conversion in the immediate release. I think it's also about being able to get better designs done more quickly, being able to get better communications

between marketing and product development, being able to allow and help an executive team make a decision that they're not going to change halfway through the project. All of those things impact the bottom line and impact a company's ability to satisfy their customers, in my opinion.

### **How often should a company revisit their web site design, for usability?**

It can and should be a continuous process. If you have a persona or personas, you can consistently review your site experience from their point of view. You can hire someone from outside your company to do expert reviews. Find someone who's immersed in, let's say, online commerce and best practices (which evolve over time), and have that person review your current site and recommend new approaches that might improve customer experience.

I think customer experience should be a consistent focus in an organization. There are ways to do usability testing and experience analysis that are ongoing. It doesn't have to be terribly expensive, it doesn't have to be terribly fancy. You can just bring in a couple of customers, sit them down, ask them to do something, and watch them do it. Ask them to talk aloud while they do their thing, and have a discussion about why they are making the choices they are making. Give them a nice gift certificate, and you're done.

I heard one company that brings in customers every Friday; they have "Persona Fridays." They bring in people who are similar to the personas they created, and they sit next to them and ask them to do something—hey, go buy one of our online games, here's \$50, go buy one. And they just watch them; they just talk to them about what they're doing. In a way it doesn't even matter so much what thing you're asking them; it's sort of keeping in tune with what people think and how they behave around sites like yours.

### **What are some of the more common mistakes that you find when you're working with companies?**

There's a big one that I love to talk about: Companies don't put their value proposition and their differentiator on their home page. They just don't!

For example, a company can assume, "Everybody knows my brand, so I don't have to put on my home page that I sell cleaning products online for

a great price and deliver them free.” They forget to do that; they think it’s too basic and too silly.

The analogy I like to make is that even the most complicated technical book starts with a paragraph that everybody can understand. Reminding people of who it is you are and what it is you do is a very important basic thing that people forget.

The second thing that’s a big problem, that I love to talk about, is something I call “corporate underpants.” What corporate underpants means is that your org structure shows on your web site. If you can trace back each of your major navigation paths to a VP, you’ve got a problem. Just because you have these different P & L centers doesn’t mean that it’s going to make sense to Maryanne to go to a different place for each of them.

Corporate underpants can show up on a site in a lot of ways. It’s making decisions about your site that are more about your internal organization and your internal goals than they are about the customer experience.

### **That’s emblematic of companies that think internally rather than externally, right?**

I think so. And even companies that think they’re thinking externally often do it, as well.

*“You have to have the executives watch customers actually use the site.”*

One example of that is to think of the last home-page design meeting you were in. Everybody’s clamoring to be on the home page, because they think that’s the only way to get attention from customers. But it’s not. It could be that the right time to tell Maryanne

about the organic line of cleaners isn’t on the home page; maybe it’s after she’s found the thing she thinks she wants.

How do you get stakeholders to stop begging for home-page placement? One way is to make them watch customers use the web site. See whether they get stuck. See if you’ve wrinkled up the carpet and people are tripping over it all over the place.

If an organization is not ready to think about a full redesign, you have to have the executives watch customers actually use the site. That is the quickest way to make people realize there’s a problem. It’s not about showing them

slides full of metrics, it's not about bringing alternative designs, it's not screaming your head off about corporate underpants, it's having them sit there for an hour and watch Betty Lou try to buy a new pair of shoes.

If they agree and go, "Oh my God, we've got a problem," then you need to look in and see what exactly we want to solve here. Is this really a communication problem? Is this really a politics problem in our organization? It's usually not just a problem with the site; the site is showing symptoms of a bigger problem in your organization.

**In my experience, I think it has to do with the strength of the senior management. A weak management kind of lets everybody have their say, whereas a stronger management will say, no, this is what the customer wants—forget the internal structure and politics.**

I think you're right—and the word "customer" there is too vague. The other thing I like to go around saying is, "User is a four-letter word." You can argue for "the customer" all you want, but what does that mean? Scratch beneath the surface and ask anyone to describe who "the customer" is, and things start getting very, very wonky.

What I've found, over and over again, is that you somehow break companies out of that when they're able to talk about Maryanne and Bobby. When Executive X says, "We're doing this for the customer," you can say, "Which customer? Because it sounds like you're talking about something for Bobby, but we've prioritized Maryanne. Now, you're an executive, you can change your mind about this, but here's the cost—it means we can't do X, Y, and Z for Maryanne. Your choice."

*"We're slowly getting to the point where people understand that customer-centered design isn't something you can put on at the end."*

It gets it out of whoever is the loudest, whoever is the most persuasive speaker, whoever it is that everyone gets tired of hearing them talk so they just give in. And it somehow depersonalizes it, so it doesn't feel like you're losing; your feature actually isn't the best one for Maryanne. You can say, "Oh, that makes sense."

**What trends do you see happening in usability?**

I do think that people are starting to find less expensive ways to do “usability.” More people are finding ways to bring in customers on a regular basis that are inexpensive and that involve more people. I think we still have a way to go in getting executives to realize that they have to be in on the sessions; it really can’t be secondhand.

We’re slowly getting to the point where people understand that customer-centered design isn’t something you can put on at the end. I think it’s the same thing that happened in marketing a while ago. I think many companies have realized that it’s always better if marketing is involved early, so they can help you understand which products would be easier to sell. And why. I think that’s starting to happen in customer-centered design.

I think people are starting to have more of a customer-centered design executive voice. Traditionally, customer-centered design has fit underneath marketing or fit underneath engineering. That’s a big problem, especially if they’re under engineering. It’s a conflict of interest for a VP of engineering to be both managing the engineering/development process and to be managing the customer experience.

Also, it’s starting to make more and more sense for people to outsource the technology of their sites—which also means they’re outsourcing a certain portion of usability.

**Do you often find usability in conflict with the technology?**

It’s not necessarily in conflict with the technology; it’s in conflict with the decisions that are made about technology—what can you build and what can you prioritize. The things that are sexy and fun for engineers to build aren’t always the things that are going to move the needle because they improve the customer experience.

Think about a few years ago, when everybody had Flash intros to their site. Well, they were very sexy, but they actually turned out to be annoying and useless.

It’s still happening today. People are saying, “Wow, we need more of that Web 2.0 stuff. We need more AJAX on our site.” That’s silly. That’s like saying, “We’re building a building; we need more concrete in that.” It’s just part of the structure. It’s not an end unto itself.

**I dealt with a company a year or two ago, and one of the claims to fame on their résumé was that they had reengineered the Google interface for some ISP somewhere. So they'd taken the very clean, simple Google interface and made it all Flash-based for that ISP. It was totally unusable! But that was very symptomatic of what was wrong with everything that company designed. Did anybody even ask for that?**

Exactly! But it was fun and interesting for the engineers, whereas maybe creating really great, clear text links wasn't as sexy.

The field of human-computer interaction started relatively recently. So people now are looking for great information architects or information designers or interactive designers. And it's tough to find one with a lot of really good experience. It's not the same thing as finding a great graphic designer. There's just starting to be enough people in the field that have that kind of experience. It's hard to find them; I can't tell you how many calls I get! "We're looking for a great interactive designer."

### **Is there any other advice you'd give to online marketers?**

Marketing is a critical part of the stakeholder group that should be creating personas together, because marketers have so much great information about customers that they can bring to the table. Just like customer-centered design, the earlier marketing is involved, the better.

If your job was to market the Pinto, not so much fun, right? Wouldn't it have been great if you had been involved earlier and been able to say, "You know what? The market would really prefer a car that didn't explode." Of course that's a silly example, but I think the same thing happens over and over again.

One of the difficulties that marketers have that personas really help with, is unless your job's about data, it's very, very hard, if not impossible, to remember bullet points of data. For example, 35- to 45-year-old women in suburban areas who make a yearly income of \$75,000 and are likely to be highly educated, blah, blah, blah. That's something that marketers and market researchers can hold onto in their heads. Other people can't, because it's not their job. What they can remember is Maryanne. In fact, if I ask you in three weeks who Maryanne was, you'd be pretty likely to remember it—whereas you probably wouldn't remember those bullet points.

I think a lot of companies and a lot of teams should think about how they make their own work product usable. How do they make the knowledge that they have easy to consume on a daily basis? We all have a tendency to whine about people not listening to us, but maybe that's because they don't speak our language. So the responsibility becomes ours to create something that's easy for them to consume. Sure you need details in a persona, sure it doesn't include everything that you've learned, but on a day-to-day basis, if Maryanne is the thing they're talking about and not "the customer," that's a huge win.

## Sound Bites

The concept of personas may seem complex at first, but it's really quite simple. It's putting a human face on traditional marketing data; instead of describing your customer in terms of facts and figures, you create a character that represents all that information. Then, when you're designing your web site and defining the customer experience, all you have to do is focus on that character. What would our persona do? What does our persona want? Answer those questions and you'll create a great customer experience.

How do you go about defining your company's persona(s)? Here's what Tamara Adlin suggests:

- Don't let an outside agency define the persona alone; the creation has to involve internal stakeholders.
- The creation of a persona should involve all important executives, managers, and other stakeholders, in order to ensure their buy-in to the concept.
- To get the point across, bring in test customers who are similar to your company's persona, and watch them try to use your web site.
- Create your persona and work on your site's customer-centered design upfront, while the site is being designed (or before); if you wait until after the site is live, you're too late.

Again, the key is to put a very human face on all your marketing data, and let a persona represent your ideal customer. As Tamara noted, it's a lot easier to remember what a single person wants than it is to memorize a raft of marketing data!