

# Learner Personas: Beyond Demographics

Karen Bishea Williams



# LEARNER PERSONAS: BEYOND DEMOGRAPHICS

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**I**n the 1980s, Procter & Gamble launched a marketing campaign for its Camay soap. The company created three personas based on its consumers and then developed products to meet those personas' needs.

For the “romantic woman” persona—who enjoys soft, romantic experiences—P&G developed feminine pink packaging with scripted font graphics and a pink bar of soap with a soft, classic, floral scent. For the “natural woman” persona, who is concerned about the environment, the company met her needs with the classic product in a white package with crisp, simple graphics and a low-level clean scent. Finally, black package labeling appealed to the modern, independent “chic woman,” with its woody scent reminiscent of the outdoors or adventurous experiences. P&G conducted extensive research to find a right color and scent combination that would appeal to each persona.

A persona is a fictional character developed to represent a group of people in a target audience, and a persona set is a collection of several such fictional characters who represent the realities of your target. Defining the people you are trying to reach typically has been a marketing technique. Marketers create a persona story of target purchasers, which helps marketers create effective advertising—just as P&G did with Camay soap.

But personas aren't just for marketers. Recently, political candidates have begun using them to understand voter groups and their

values to create effective messaging. And talent development professionals can find personas equally beneficial.

Having a deeper understanding of your target learner can help you make better design and curation decisions. When you know more about your learners' interests, knowledge gaps, learning preferences, and even their amount of discretionary time for learning, you can offer products that better meet their learning needs.

In this issue of *TD at Work*, I will unpack learning personas from the L&D perspective, providing:

- information about how to better understand your learners, which can influence your learning design
- insights and a five-step process for building a set of learner personas
- a sample learner persona set.

## Discover Your Learners

You likely already have a basic understanding of your learner group or audience. Perhaps you have your courses divided or subdivided into categories based on

### Cast a Wide Net

Consider these avenues and potential individuals to tap as you collect data to create learner personas.

#### How

- survey: learner self-assessment
- survey: knowledge check
- job shadowing
- task observation
- learner as teacher
- individual interviews
- group discussions
- exploring existing data

#### Whom?

- learners
- managers and supervisors
- customers
- subject matter experts and industry experts
- leaders or employees from similar industries
- other stakeholders

the learners' time in their role (such as new hire and new manager); work type (for example, accounting, customer service, manufacturing); level of learning required (that is, foundational, intermediate, advanced); and location (such as the central office, manufacturing site, and remote office). These categories take into account a basic understanding of the target learners.

Learner personas can further your understanding as you dig deeper so you gain more complete knowledge and perhaps some new insights for target learners and their environment. They will help you create better strategies and design learning assets.

For example, creating a persona group could lead you to make different learning choices by using less conventional learning methods—such as information-sharing, job aids, and one-on-one coaching. Or it may help you understand corporate cultural differences that direct you to develop a program away from the classroom to smaller online-searchable learning assets.

Having a deeper understanding of targeted learners benefits you on many levels. The modern learner is living in the world of fast-pace change. Information travels at the speed of light and often can be frustrating and overwhelming, given individuals' daily pressures. Your learners have resources and information (and misinformation) at their fingertips. Yet, finding, engaging, and applying learning can present hurdles for both experienced and new employees.

Your responsibility is to create learning assets that organize information to engage employees, lead them to the right information at the right time, and enable them to apply learning effectively. Having a clear picture of your learners in the form of learner personas gives you a tool for:

- **Engagement.** Not all learners need the same level of knowledge or tool for their role. For example, an IT specialist needs to understand how to specifically gather data and make them work together to present a story. However, for a different employee, the working details are an overload and instead a summary could be enough. One size does not fit all when it comes to creating engaging learning.
- **Stickiness.** Stickiness is the abstract but essential quality of learning that makes the important principles stay with the learners so they can call upon and

apply them. Design decisions that make learning sticky include learner hands-on interactions and creating realistic and relevant actions and consequences within the learning. An understanding of this can help you seek out the best subject matter experts as consultants and trainers—for example, the ones with the correct level of expertise or the ones who will establish a rapport with your audience.

- **Prioritization.** This can be vital when an organization is overhauling a corporate-wide system. You and your L&D team should recognize that, by using learner personas, there are levels of user knowledge: expert, proficient, occasional, and new users. By prioritizing the rollout to expert and proficient users, you can use those individuals as global trainers to the occasional and new users.
- **Access.** Not all learners have equal access to or a need for learning tools. Learners in a manufacturing setting have different access to technology than learners in a corporate office setting. Another example is learners' preferences in the way they access learning in different regions. I was surprised to learn that learners in Asia like to watch training videos during their commute. Having learning personas to identify these learning preferences makes learning access planning easier.
- **Expectations.** Learning personas can help identify segments where it is important to set clear and robust expectations. For example, a principle such as “Never disparage the competition; our product quality speaks for itself” is something the sales force needs to practice daily, but for production engineers, an occasional reminder will be adequate.

**Having a deeper understanding of your target learner can help you make better design and curation decisions.**

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## Consider Your Purpose and Tools

Before you create learner personas, know your desired purpose for them. Are you planning a learning program for a range of learners with one common curriculum (such as on compliance)? Are you developing a specific skill set, like providing effective feedback? Or are you targeting a particular delivery mode—for example, mobile learning for sales professionals? By determining your purpose, you'll avoid collecting extraneous, unnecessary data.

Personas are a composite representation of characteristics. Collecting information on characteristics is based on both your current learner knowledge and new information you collect using quantitative and qualitative tools. Take time to understand the discovery tools you have and what help you may need.

For example, you may need to interview learners, managers, and leaders—even customers and external stakeholders such as partners who can shed light on what learners need to know. Interviewing is effective but can be time consuming and require recordings, transcripts, and analysis resources. Discovery tools may also mean developing and deploying learner surveys and conducting analysis. Knowing your tools and resources in advance can help you make informed recommendations for next steps.

## Create Learner Personas

Let's walk through a five-step process to create a learner persona set and increase your understanding of your learners. In doing so, I will present case study examples so you can see the process lived out with real-world learning.

The process of creating a group of learner personas is just as important—maybe more so—than the output stories themselves. Do not get discouraged with the rigor of these steps; you likely will find some profound insights. Note: I created this five-step process in collaboration with my colleagues Lisa MD Owens and Crystal Kadakia.

Before we delve into each step, let me set the stage for our case study: Company X recently conducted an

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