

# Combining Qualitative and Quantitative Research to Define Customer Personas



Marketers and designers have long understood the importance of defining customer personas. Personas serve as archetypes that represent a class of real customers. They provide a clear vision of the customer in which to build products or campaigns around. Personas can:

- Convey the needs and values of your customer base
- Describe how and why people use your products/services
- Keep organizations aligned on who your target audience is
- Provide a clear picture of user expectations and problems

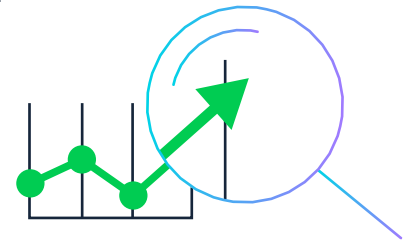


Figure 1 illustrates an example of a persona. It profiles “Small Business Steve,” who represents a set of characteristics, goals and values shared by a segment of customers. Since you know what “Small Business Steve” does, what kind of firm he works at; that he needs a customer monitoring program and is frustrated with expensive software – you can begin to visualize how you should design products to serve him. By identifying this persona, you now have a shared goal and framework in which to build around, and any product development process becomes more efficient and focused. Decisions and innovation can focus on solving the problems of this persona.

User personas are developed through intensive customer research. While insights can be gathered through internal team conversations and customer-facing reps, only through systematic data collection can you obtain a thorough understanding of users and different segments of a customer base. This means asking customers — through surveys, focus groups or in-depth interviews, to investigate and discover what frustrates and delights them; their goals and motivations as well as the circumstances under which they might use your product.

### Meet Small Business Steve

#### Key Characteristics

**Occupation:** Small business owner

**Firm:** 3-5 employees

**Industry:** Custom luxury apparel

#### Goals:

- Monitor how his customers feel about their purchase experiences
- Track customer complaints; make sure they get resolved
- Address customer issues in a quick and timely manner

#### Frustrations:

- Most software is too expensive and loaded with features he doesn't need
- Has trouble separating what needs his attention and what can be delegated to staff
- No system for prioritizing the severity of customer complaints

Small business Steve runs an online retail site. His products are customized, and as such, his clients are demanding and require high levels of service and attention. He used to handle his customer service solely via email and phone, but now his business has grown to the extent that his customer services processes require a more streamlined system. Steve is often travelling or busy with client meetings so it's important for him to delegate work to staff and step in only as needed.

*Figure 1. User personas represent a class of users who share a common set of characteristics, goals and needs. User personas describe a type of customer and help designers visualize the individual(s) they are building a product for.*

# Qualitative Research

Qualitative research is an excellent starting point for developing personas and forming hypotheses about your customers. Whether it's a focus group or in-depth interviews, having extended conversations with customers allow you to experience what their needs, values and frustrations are. You will also gain insight into the context and situations in which they use your products. A webcam interview, for instance, can provide a visual window into their home or work environment allowing you to see how they interact with your product. Online diaries can give you the opportunity to probe a customer's thought process and experiences on a day-to-day basis. The goal of this research work should not be to understand the needs and wishes of all your customers but to extract common themes and major needs of your most important users. These will form the basis of your persona development.

## Research Question for Persona Development

Usability.gov offers a [set of guidelines and questions](#) to ask during persona development. This can vary depending on what is relevant for your industry and product, but generally a basic persona description consists of 3 core elements:



### 1. Personal or Professional Profile

- Age, Gender, Income
- Job Title / Role
- Industry, work experience



### 2. Goals / Motivations

- What do they need / value?
- What frustrations do they have?
- What are they trying to accomplish?
- And what is motivating them to get there?
- What does a successful outcome look like?



### 3. Environment

- Describe the job / personal situation as it relates to using your product
- Where / when are they interacting with your product?
- What brings them there?
- Who are they with?

Our work with our own customers at FocusVision provides an illustration of how webcam interviews can be used in the development of persona's (see [Getting Real: Talking the Talk with Deeper Human Insights](#)). We were interested in enhancing our survey software platform and scheduled 30-minute interviews with a random sample of 15 of our customers. The conversations centered around feedback on potential new features and likes/dislikes about the software. We asked questions that provided a deeper picture of who the customer was and what motivated them. For example:

- What are your primary job responsibilities/roles?
- What are the job motivations and needs surrounding the use of FocusVision Decipher software?
- Describe a job situation in which FocusVision Decipher is being used; what is being delivered?
- What are your needs and frustrations at work?

During the interview, participants were able to share their computer screens to show or even demonstrate specific areas of the FocusVision Decipher software they were referring to. Collecting all of this customer feedback allowed us to see distinctive patterns among those interviewed. There were classes of customers who shared profiles and faced similar situations and needs, which of course, led us to a few key user personas.

## Quantitative Research

Quantitative research or online surveys can be used to gather feedback from a large sample of your customers. It's common to interview several hundred customers in a survey, and large sample sizes such as this provide confidence in data; it's robust enough to make a conclusion about your total customer base. Surveys can therefore be a way to validate the persona findings from your qualitative research.

Using surveys for persona work would follow a similar question framework as discussed earlier. You would profile customers using demographic questions and probe for different user scenarios related to your product. Including a battery of attitude statements is a common question design for this type of survey. You want to ask people to identify what bothers them, what delights them, and what their needs are. Distinct customer groups, or persona's, that share similar profiles will emerge from the survey data which will either confirm your original hypotheses or lead to new persona discoveries.



## Using Surveys to Define Personas

Rating scales are a common way to measure needs and attitudes in surveys. Customers with similar answers can be grouped together as a sharing set of common characteristics. These groupings can form the basis of defining and validating your customer personas.

A battery list of statements can be tested using a grid-formatted question type.

We'd like to know what your vehicle needs are. Tell us how much you agree or disagree with each statement

Select one

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
I just need to get from point A to point B	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
I like to drive in luxury	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
I need something roomy for my family	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
I need something for a night on the town	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
I drive in the back country with no roads	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Good gas mileage is most important to me	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
I want to zip in and out of traffic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

A dynamic question, such as a card sort, can also be employed. In a card sort, the respondent rates themselves on a statement; then the next one slides across the screen. Dynamic questions can be a more user-friendly way to engage survey respondents.

We'd like to know what your vehicle needs are. Tell us how much you agree or disagree with each statement

Please select a button for each card.

<

I like to drive in luxury

>

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

The development of customer personas is an important part of succeeding in business and providing products and services that customers value. Having a clear definition of your target audience helps focus decision making and keeps your organization aligned on specific customer problems and desired outcomes. Customer personas, however, depend on the quality of research behind them, and these should be based on a combination of qualitative and quantitative investigations. Qualitative research can provide detailed narratives of customer situations, perspective and needs. And quantitative data can validate these findings using larger sample sizes. Together they provide a full picture of your customer wants, needs, and motivations.



**To learn more about FocusVision  
research solutions:**

visit [focusvision.com](https://focusvision.com) or  
email us at [focusvision.com/contact](mailto:info@focusvision.com)