Identifying a set of line manager personas to guide new product introduction strategy

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What action should a company's top management take when innovative new products designed with careful attention to the needs of customers sell in some stores, but not others? The designers of the products were familiar with a chronic cause of new product failure identified by pioneer software programmer Alan Cooper:

> If, responding to the directive "design for the user"... you tend to canvass the user community, collect their requests for functions, and then provide them a product containing all of those functions. I call this "the sum of all desired features." There is abundant empirical proof that this solution is only marginally effective at best.[1]

Cooper's novel solution, which he described in a chapter of his book *The Inmates Are Running the Asylum*, published in 1999, was a methodology for researching and creating customer personas – a set of archetypal potential customers with distinctly different experience, needs, relationships and jobs to do.[2] A persona represents a target customer or user, external to an organization that shares common behavioral characteristics. Within companies, product designers, developers, management and sales representatives carry different assumptions about their customers and users which impacts the design and success of products.

The firm's product designers, knowing how different personas would interact with the innovative product and service bundles were able to design them so that they were "user friendly" in a variety of specific contexts. However, because the bundles sold well in some stores but not in others, top management sought information on why some stores were better than others at introducing innovations.

At the point where new product strategy intersects with frontline practice, how can top management ensure that an innovation that is customer-centric will be accepted and implemented by its employees?

A case in point

A global franchise organization elected to use the persona methodology to address a vexing new product introduction problem. The firm recognized a market opportunity to create an innovative integrated hardware, software product and service bundle, but it had previously launched innovative products that failed in the market. Research indicated the cause was a combination of lack of customer testing and franchise owner training. The organization concluded that their franchise owners were the gatekeepers to successfully

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rolling out this and other new products for their customers. But they also were aware that their franchise owners were not a homogeneous group. Their different skill sets, relationships, requirements and expectations determined how they implemented the company's new product introduction strategy.

To understand the franchise owners' perceptions and management styles, interviews were conducted with franchise owners. Using the concept of the "manager persona" a research team identified four distinctive franchise owner personas and determined how their characteristics would affect how an innovative offering was sold in their store. These results were presented to the strategic leadership team of the company and used to further develop the concept of manager personas as a guide to innovation and marketing strategy.

The design of user personas

Cooper's personas were developed to put a "face on the users" by creating a set of characters, with attributes and histories that represent a real group of users or customers with similar characteristics. Personas assist in highlighting the differences in these assumptions and create "a concrete, focused and stable definition of a customer or user".[3] Personas are based on knowledge from real users, obtained from detailed user research, to help identify customer motivations, expectations and goals with regard to the target product segment.

Personas are typically made up of identity, status, goals, skill set, tasks, relationships, requirements and expectations.[4] As personas help to develop a description of the user, data needs to be collected on the target user, which can be through interviews, observations, surveys and existing market research.[5] These data are analyzed for patterns and themes highlighting the goals, behaviours and attitudes of users with similarities grouped together to illustrate potential persona characteristics. The resulting personas represent key target users for product and service design and development. Basic information includes:

- Name.
- Age.
- Occupation.
- Location.
- Short Bio.
- Motivations, Goals and Frustrations.
- Interests and hobbies.
- Technology ability.

While personas are extremely effective tools for businesses to employ to understand their target user and customer, to date they have not been developed into a tool for internal use within an organization. This case illustrates the development of the manager persona for internal implementation within an organization to aid with strategic workforce decisions.

The manager persona

Manager personas identify key leadership and management styles, as well as behavioral and cultural characteristics. This allows the executive management and senior leaders to effectively target who will trial, launch and roll out new products within the organizational structure, in this case, franchise managers. Additionally, manager personas allow senior management to test different approaches and target managers with certain characteristics to implement new product introductions. Management style categorizations were made based on attributes observed in franchise owners, their interactions with staff, as well as their views of their customers. Similarly, leadership categorizations were based on their visionary opinions of the future of their business and the industry in general. Exhibit 1 provides an overview of the characteristics and key questions to ask when developing user personas and manager personas.

Case study

Due to a lack of acceptance in some markets, several launches of bundled innovative products and services failed, leading to many franchise owners to be reluctant to sell anything but the company's standard products in their stores. In coordination with the introduction of its latest innovative offering, management mounted a program to investigate franchise owners' perceptions and adoption issues to produce a repeatable, scalable solution to better address customers' unmet needs.

Following a design innovation and user-centered approach, franchise owners' insights were gained prior to the final development of the product, to understand their desire and current use of technology as well as the potential impact this new product offering would have on their business. Interviews were conducted face-to-face with 14 franchise owners, to gain facts, opinions and attitudes. Key questions from Exhibit 1 were asked and included: demographic data (age, gender and location) and data on franchise store ownership (length and reason for ownership and knowledge of customers). The aim of the interviews was not only to gain the answers to these questions but the underlying reasoning behind the answers. By grouping together similar backgrounds, attributes, motivations and challenges among franchise owners the interviews uncovered four personas. The four manager personas identified include:

1. Laidback Larry.

2. Reluctant Rodger.

3. Confident Callum.

4. Involved Ian.

In addition to the personal characteristics of each persona, their business characteristics, see Exhibit 2, were also grouped to understand the type of relationships they had with their

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Exhibit 1 Characteristics and questions to ask to develop user personas and manager personas

	User persona	Manager persona
Target user	External to the organization: A customer, user	Internal to the organization: A franchise owner, employees
Characteristics	Personal	Personal Business
Application	Design aid Communication aid	Design aid Communication aid Strategic aid
Basic information	Generic questions and information include: Age Gender Occupation Qualifications Skill sets Hobbies Relationships	Generic questions and information include: Age Gender Occupation Qualifications Skill sets Employment background Management Style Leadership Style
Business information	Not typically included	Examples of questions and information include: How long have you had this store? What made you want to buy this store? Understanding of typical customer Peak and off peak season Customer drivers Biggest issues keeping you up at night
Education and career background	Description of education background What level of education did you complete? Where did you study? What did you study? Do you plan to complete anymore study? What is your job title and role? How is your job measured?	Description of career path How did you end up where you are today? Have you completed any tertiary study? If so, what? How is your job measured? Have you come from a different industry? How long have you been in this role? Who do you report to? Who reports to you?
Typical activities	Description of everyday typical activities What does a typical day for you include?	Description of typical workday activities What does a typical work day look like for you? What skills are required to do your job? How much do you learn on the job? What knowledge and tools do you use in your job? How many staff report to you? Are you the face of your business to your customers?
What are your biggest challenges?	How does that problem affect your day-to-day life?	How does that problem affect your day-to-day life?
Goals	Life goals What does it mean to be successful? What is driving you? What challenges do you face? How can you overcome these?	Business goals What are you responsible for? How do you learn about new information, products and tools for your job? What does it mean to be successful? What do you feel is standing in your way of achieving these goals? How can you overcome these? What is driving you?

customers, their understanding of their competition in the market, their adoption of new technology and their willingness to take risks.

The strategic use of manager personas

The results from the case study identified the manager persona.

	Laidback Larry	Reluctant Rodger	Confident Callum	Involved Ian
Exhibit 2 Manager persona personal and business characteristics				
Background	Has been in the industry for a significant period of time and worked their way up through the business.	Has owned the business less time than the others, potentially co-owned	Very well educated and has come into the industry from the business world. Is in it for the long term.	Has come from a corporate background and is heavily involved in the operational and strategic side of the business.
Attributes	Understands change needs to occur and up to date with developments within the industry	Not forward thinking and believes the problems of today need to be fixed first. Still a bit out of their depth within the industry is limited compared to others.	Due to the success of their store, they know everything in the industry, are not fearful of competition and don't like change	Open to change, constantly working and trying to improve business
Motivations	Loves the business, enjoys building relationships with customers, being out of the shop.	Bought the business as it as it was a good decision financially in comparison to other franchises.	Business strategy. Won't sell new products, until they are tried and tested.	Enjoys the financial reward of their job and leaving a legacy for their family.
Challenges	Maintaining growth in the business and keeping good staff.	Finding and keeping staff due to lack of knowledge and staff appreciation also getting stock from suppliers when needed.	Finding, training and keeping staff.	Day to day operations of the business, finding time to get all the jobs done, staff.
Management Style	Mentor/ Developmental	Top-down manager	Directive	Pacesetting "do it myself" manager
Leadership Style	Transformational	Transactional	Transactional	Friendly transactional
Customer relationship	Doctor/Patient relationship	Transactional customer relationship	Transactional customer relationship	'Doctor/Patient' relationship
Competition	Sells ice to Eskimos Aware of competition, and somewhat threatened	Not aware of disruptive competition but highly threatened	Aware of competition but not threatened	Aware of competition and threatened
Technology and new products	Excited by new technology	Doesn't easily sell new products	Doesn't like selling new products if they will cost extra money and time to maintain	Concerned with time, technical issues and reliability of new technology
Risk	Sees the future of where the industry needs to go and is excited by it	Doesn't easily sell new products	Doesn't easily sell new products until proven	Willing to sell new products

"Laidback Larry," see Exhibit 3, as the strongest franchisee character to launch a new product. This persona is more open to implement and use new technology in their store, is aware of competition and is willing to take a risk for a low reward. In striking contrast, the persona 'Reluctant Rodger' isn't interested in implementing new technology in his store and is not willing to take a risk, unless the new product has been proven elsewhere, and he can then expect a reward from it. This manager persona does not have the characteristics and motivations to achieve the successful implementation of a new product and therefore should not initially be targeted (see Exhibit 2).

These results and all the manager personas' positions on three key issues – competition, risk of implementing new products and technology implementation – were presented to the company.

Competition

All franchise owners were aware of their immediate competition, which they primarily perceived as being online stores. Franchisee perceptions of competition – their awareness and concern – are illustrated in Exhibit 4. Laidback Larry is aware of the

Exhibit 3 Laidback Larry persona

|	Background:	Has been in the industry for a significant period of time and has worked their way up through the business.
Laidback Larry	Attributes:	Understands change needs to occur and up to date with developments within the industry
	Motivations:	Loves the business, enjoys building relationships with customers, being out of the shop.
	Challenges:	Maintaining growth in the business and keeping good staff.
	Management Style:	Mentor/Developmental
	Leadership Style:	Transformational

Larry has a doctor/patient relationship with his customers. He is aware of disruptive competition and is somewhat threatened. Larry is excited by new technology, sees the future of where the industry needs to go and is optimistic.

Exhibit 4 Manager persona awareness and concern of competition

AWARENESS

+

CONCERN +

Laidback Larry

Confident Callum

Involved Ian
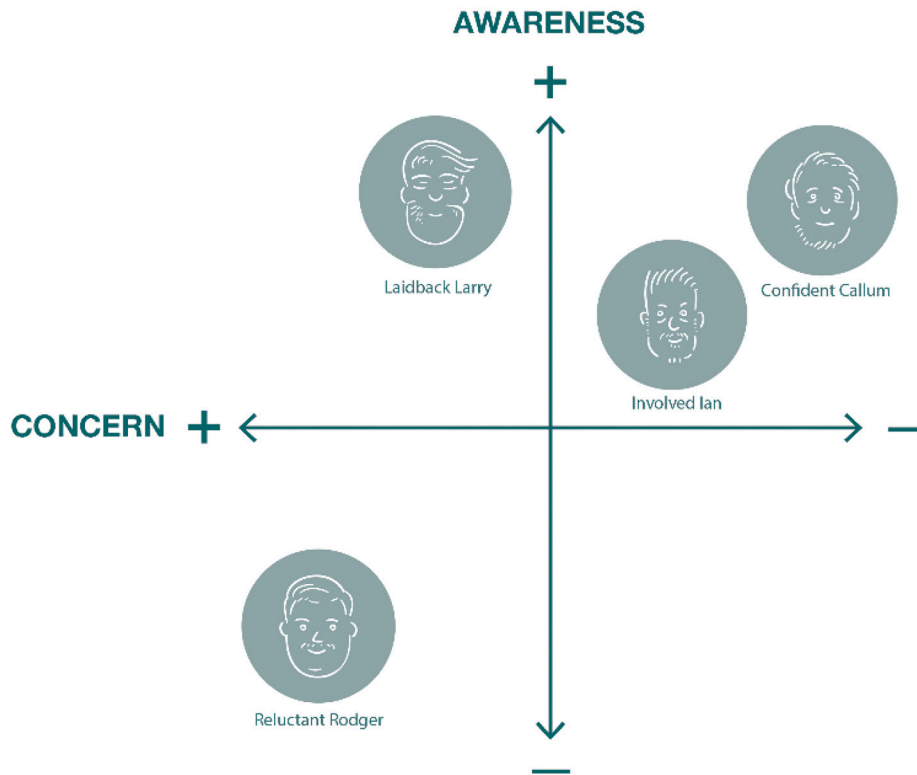
Reluctant Rodger

competition and somewhat concerned, Confident Callum is aware of competition but not overly concerned, Involved Ian is somewhat aware of the competition and somewhat concerned and Reluctant Rodger is not truly aware of the competition but is quite concerned by its threat.

The risk of implementing new products

Exhibit 5 illustrates the different positions on franchisee's willingness to take risks to implement new products. Confident Callum is not willing to take a risk unless he will see a high reward from it, Involved Ian is willing to take a risk to break even, Laidback Larry is willing to take a risk for low reward and Reluctant Rodger is not willing to take a risk implementing new products until he is sure of the reward.
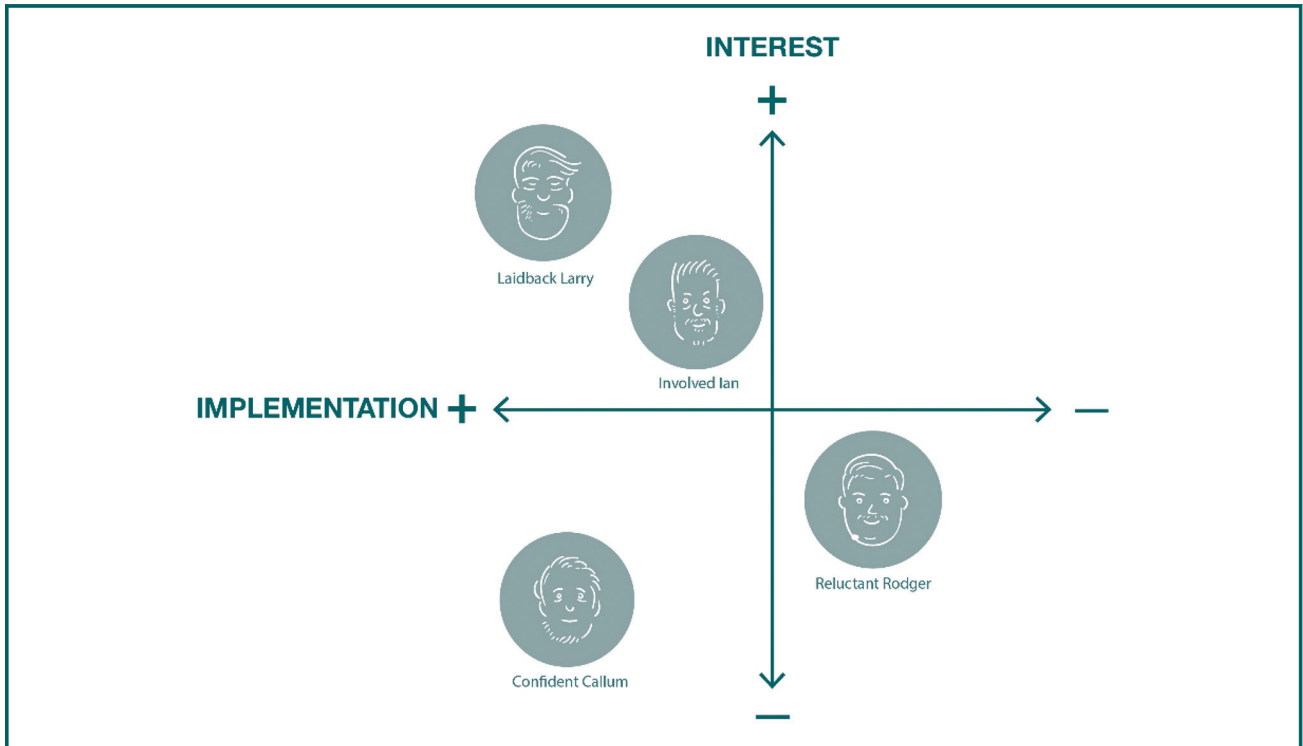
Technology implementation

Many franchise owners associated the implementation of new technology with creating extra work for them including contributing to staffing issues. Those who weren't interested in new technology were more resistant to change. Predominately, these owners had only been in the industry for five years or less and had come into it from a different business area. However, those willing to embrace new technology saw this new product as something that would set them apart from the competition within their industry. In order for some franchise owners to be interested in and use new technology, they needed to feel that the product had been extensively trialed and

Exhibit 5	Manager persona willingness to take risks for new product implementation
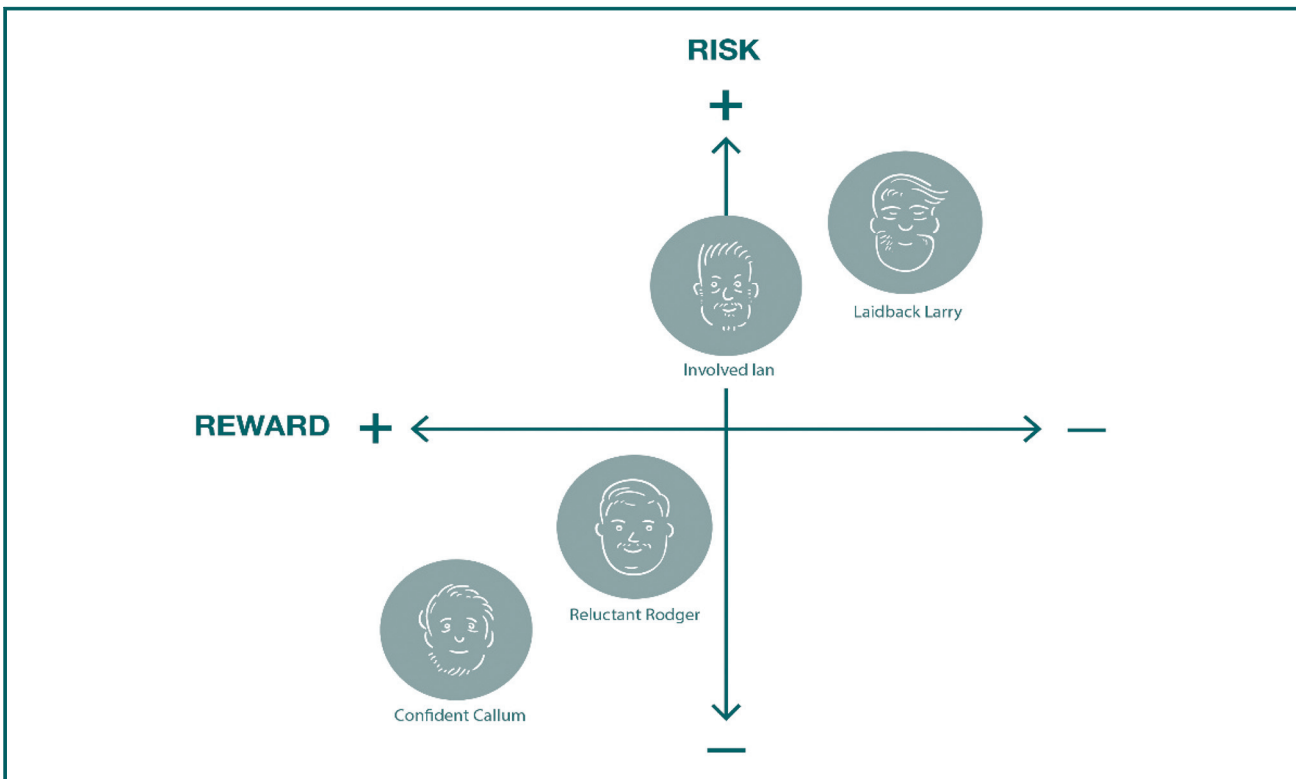
tested, and would include ongoing training and support throughout its implementation. Exhibit 6 illustrates franchise owners' interest in and implementation of new technology. Laidback Larry has an interest in technology and has implemented it in the store, Confident Callum is not interested in new technology but is willing to implement it, Involved Ian is somewhat interested in new technology and has implemented it to an extent and Reluctant Rodger isn't interested in technology and hasn't implemented it.

Strategic takeaway

In the case study, the senior leadership team saw the manager persona as a strategic aid to, "Help target the implementation of new products in stores, select franchise owners for potential new roles and to deeply understand the motivations, challenges and attributes of their middle management contributing to the competitive advantage of the organisation."

Other strategic aids of a manager persona could include:

1. Gaining a deeper understanding of the response of a workforce to a major change in business practice.

2. Target specific manager personas for training, professional development and promotion purposes.

3. To develop individual strategies for dealing with each different manager persona types.

Notes

1. www.cooper.com/journal/2008/05/the_origin_of_personas

2. *Cooper, A., (1999), The Inmates Are Running the Asylum, Sams Publishing.*

3. Pruitt, J., and Adlin, T. (2006), *The Persona Lifecycle: Keeping People in Mind Throughout Product Design*, Elsevier, p. 15.

4. Baxter, K., Courage, C., and Caine, K. (2015) *Understanding Your Users: A Practical Guide to User Research Methods*, Elsevier.

5. Price, R., Wrigley, C., and Straker, K. (2015), "Not just what they want, but why they want it: Traditional market research to deep customer insights," *Qualitative Market Research,* Vol.18, No.2, pp. 230-248.

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