LEARNER PERSONAS:

The Secret Sauce to Human-Centered Design
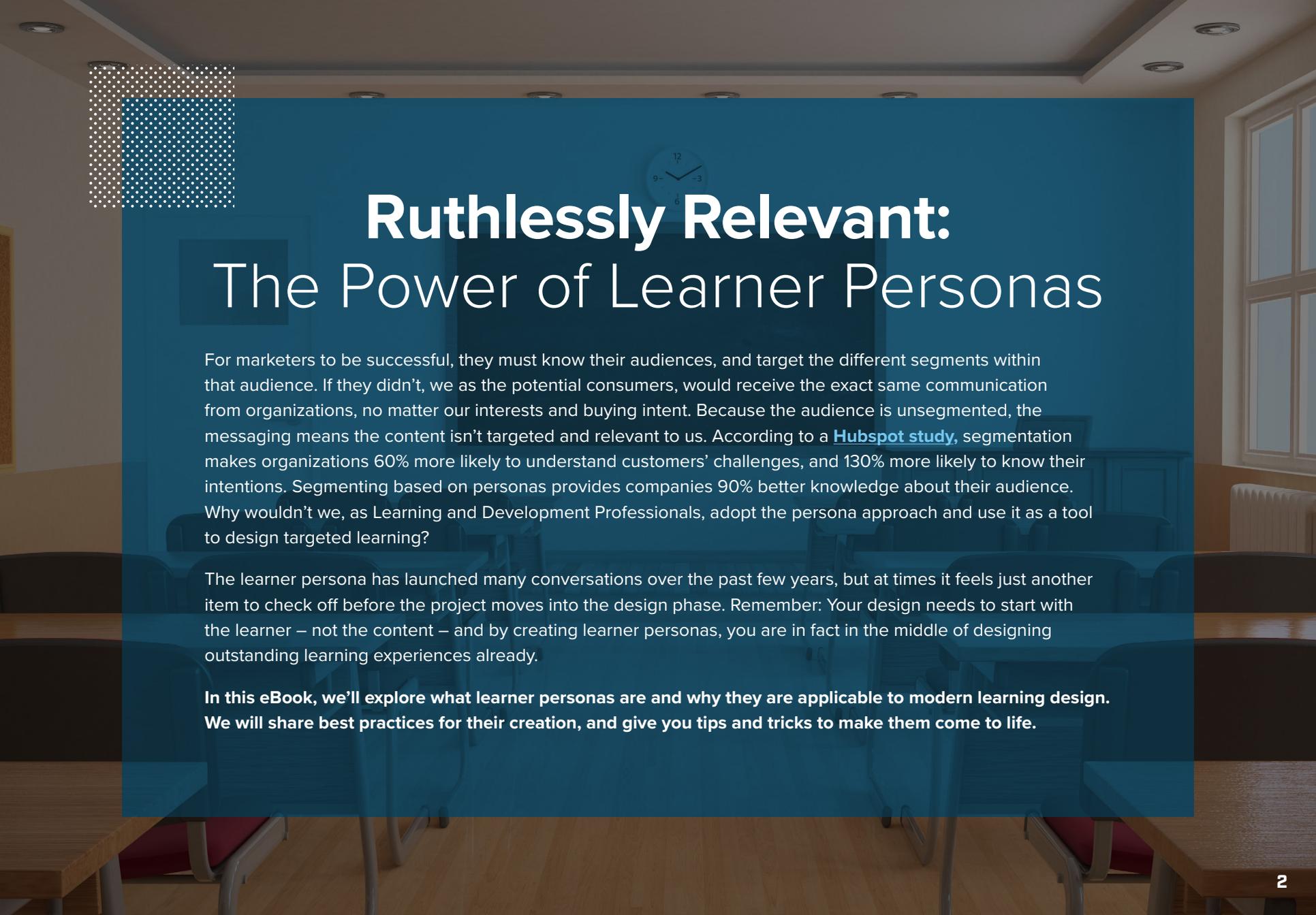
Ruthlessly Relevant:
The Power of Learner Personas

For marketers to be successful, they must know their audiences, and target the different segments within that audience. If they didn't, we as the potential consumers, would receive the exact same communication from organizations, no matter our interests and buying intent. Because the audience is unsegmented, the messaging means the content isn't targeted and relevant to us. According to a **Hubspot study,** segmentation makes organizations 60% more likely to understand customers' challenges, and 130% more likely to know their intentions. Segmenting based on personas provides companies 90% better knowledge about their audience. Why wouldn't we, as Learning and Development Professionals, adopt the persona approach and use it as a tool to design targeted learning?

The learner persona has launched many conversations over the past few years, but at times it feels just another item to check off before the project moves into the design phase. Remember: Your design needs to start with the learner – not the content – and by creating learner personas, you are in fact in the middle of designing outstanding learning experiences already.

In this eBook, we'll explore what learner personas are and why they are applicable to modern learning design. We will share best practices for their creation, and give you tips and tricks to make them come to life.

Chapter One

What are Learner Personas?

Learner personas are fictitious characters that represent your typical learner. They offer us, the learning designers, opportunities to pinpoint and see our audience, and to meet their needs based on preferences. Personas enable you to create effective, human-centered learning solutions, enabling you to share the right content, at the right time and place.

Typically, a learner persona consists of demographic information, such as role, department, level of education, location, and tenure. You will name the persona and make them come to life with a profile image. The information you capture will be more personal and will include your persona's interests outside of work and personal goals. Some of this information is what a typical target audience analysis would uncover; personas differ because they present what your audience sees, hears, does, thinks, and feels every day. Learner personas enable you to add an emotional level to your target audience analysis helping you understand the whole person, rather than simply a static, 2-dimensional learner. Once you have a better understanding of your learners' emotional states, you can extract pain points and needs. These should not only refer to learning-related pain points and needs but be much broader to reflect the entire employee experience. Not everything is a training-related problem or need.
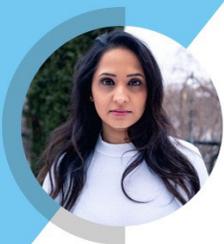
Apima Barsar

Age: 26
Location: London
Tenure: 1 year
Role: Administrative Assistant
Education: B.S.
Goal: Manage a team
Tech-savviness: High
Interests: Running and reading
Best time to learn: Early in the morning
Access training through: Any digital format
Other: English is her second language

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SEE

She is overwhelmed by the large volume of work. She just doesn't have time to learn new skills at work. She needs a more flexible schedule. Her child is her priority right now.

HEAR

She hears from others that feel equally overwhelmed and miss flexibility on how they can access training, especially when they need it.

DO

Daily focuses on tasks and keeping operations running smoothly. Apima is a valued member of her team. She is taking classes online because it provides flexibility for her family-focused life.

THINK & FEEL

Overwhelmed by trying to keep up with multiple request and competing timelines. Frustrated by the training she has gotten because she doesn't understand how it relates to her role or future roles.

PAIN POINTS

- Her manager isn't available as much as she would like
- She doesn't know where to go to learn new skills to help her reach her goal
- Too many different sources and it's hard to distinguish what's worth her time
- Not enough open communication within her core team
- Too much gossip

NEEDS

- More guidance from her manager
- Dedicated time to learn
- People to stop talking and act, follow-through on accountabilities

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Backing out to look at the bigger picture will allow you to create a learning-cohesive environment. Learner personas allow you to go beyond a traditional target audience analysis. They still won't get you to the point where you can personalize every employee's learning experience, but they get you much closer as you keep emotional states in mind.

Personas are created only once for your entire organization and revisited as needed for individual projects. Ideally, you want to have 3-5 personas; this number might increase based on the size of your organization, your global footprint, or number of business units. Having too many personas in place can quickly over-complicate your learning designs.

Chapter Two

Why are Learner Personas Applicable to Learning?

Employee-led (bottom-up) experiences consider the employee's pre-existing tendencies for optimal working conditions. Personal (individual) experiences consider the psychological needs that must be met for someone to perform their work well. When these two experiences intersect, we find human-centered experiences, which, according to Deloitte, motivates modern learners.

Learner personas are your first step in your journey to human-centered solutions. When you design learner personas, you identify the intersection of employee-led and personal experiences, helping employees answer the question: Am I making a difference at work? Learner personas allow us to connect work back to a deeper understanding of the worker, the work environment, and the bigger impact work has on helping employees achieve their aspirations.

When you create a learner persona, you shift the focus to the person who will interact with your client, putting their needs and aspirations — and pre-existing knowledge and time bandwidth — before your content needs. You put yourself into their shoes, move from an abstract idea to a defined representation of your learners, and remove the guess work from your design. In turn, you can better understand what intrinsically motivates your learners, design meaningful learning into their day-to-day, all while increasing engagement and productivity.

Chapter Three

Best Practices When Creating Learner Personas

The process sounds simple enough, but well-crafted personas take time — between 3-4 months on average. There are 4 steps to the creation of personas:

1

CREATE ALIGNMENT

2

GATHER INFORMATION

3

ANALYZE INFORMATION

4

CREATE PERSONAS

CREATE ALIGNMENT

The most important step in creating personas is to align stakeholders in your organization and identifying which business units need to be represented and who, within those business units, should be at the table. This is usually dictated by the project you are working on that is the starting point for your personas. Although personas are valid for your entire organization, there's always a project that kick-starts the creation process.

Stakeholder alignment is crucial to identify how you want to gather information: learner and manager interviews, observations, or HR data. You need buy-in from the get-go for the best outcomes. For interviews specifically, is it feasible to take employees off the job? If yes, for how long? Are managers onboard and in support of this initiative or can you expect an uphill battle? Stakeholder alignment not only allows you to get buy-in but to manage expectations as well.

Ideally, you'll want to have two meetings. Use the first meeting to get stakeholders excited. Present the persona concept, its benefits and brainstorm what personas you want to create. Do you want to focus on individual contributors or managers? Are there specific job roles you want to build your personas around? Or build them based on their attitudes and aptitudes, such as Achiever or Supporter? The best way to think through this is to segment your overall audiences into larger buckets. From there, you can then define more detailed persona characteristics. Start with what you know about your segments and write down the things you don't know.

The second meeting should focus on information gathering. If interviews are an option, talk about what questions to ask learners and who will be interviewing them, then decide which learners and managers you'll interview. If you want to observe learners, develop a checklist that allows you to standardize and streamline your findings, especially if you have multiple people observing learners. The checklist should be developed based on the outcomes of the stakeholder alignment meeting and could consist of specific questions or areas the observer should keep a close eye on.

With names, questions, and observation checklists in hand, you need to send out brief communications to managers first, especially if they haven't been in the initial stakeholder alignment meetings. Describe why you are embarking on this journey, what it means for them and their employees, and how they can support you. You can offer a meeting to answer any questions they might have. Once you have managers' buy-in, you can reach out to learners. Invite them to learner interviews or let them know about the observation. The meeting invite should include the reason for the interviews or observations, the questions you will ask, and a note that interviews and observations will be confidential.

As already mentioned, learner and manager interviews are your prime source of information. Depending on your industry, observing learners can give you valuable insights as well. Lastly, you want to leverage data and analytics you can source from HR or your IT department. This could include demographic information and extend all the way to usage data from your LMS or LXP, Intranet usage, Teams or Slack, or any other technology platforms you might have in place. Many organizations run annual employee pulse surveys. Those are a great source of information.

For learner interviews, you want to talk to 10-15 learners per persona. That's when you start seeing trends. For manager interviews, you can keep it to about 5-8. Conduct learner interviews first. This allows you to dive into very specific questions for your managers based on your findings to date. Interviews can be conducted as focus groups with no more than 5 people. Book one hour for those and have no more than 10 questions prepared. Or, you have 1:1 interviews that last 30 minutes with no more than 6 questions. Depending on your culture, focus groups might not give you honest answers compared to 1:1 interviews. It's crucial to keep questions generic and not only focused on learning-related issues. Questions might include:

- Tell me more about your role and the time you have been with us

- Tell me about your day-to-day

- Tell me about challenges you see every day

- Tell me what delights you and gets you excited to come to work

- Tell me more about the training and learning offerings you take part in

- What else do you want to share today?

If you observe learners, you want to schedule time with 5-8 learners to compliment your learner interviews.

Be aware of negativity in learner interviews. When employees get a chance to share insights about their work, it can often, and quickly, turn into a very negative conversation. Whereas that is somewhat normal, it is up to the interviewer to bring the conversation back on track and identify positive experiences as well.

ANALYZE INFORMATION

Capture all responses in one Excel sheet. Adding questions across and individual learner responses vertically allows you to scan through all answers for each question quickly, look for trends and spot differences. If you observe learners, you want to combine all findings into one source of truth and look for trends.

It's easy to get overwhelmed with the amount of information you gathered. Looking for trends and similarities is extremely important. You will always come across outlier answers, i.e., answers that you only heard from one person. Based on the content and context, these outliers can be ignored or passed on to other areas of your business for awareness purposes. The goal is to create personas that represent your typical learner so one-off responses are most likely not representative.

Overlay the information you gathered during interviews and observations with qualitative and quantitative data that supports your findings. If data contradicts what you heard during interviews or observed, you might want to book some follow-up meetings to get to the bottom of this.
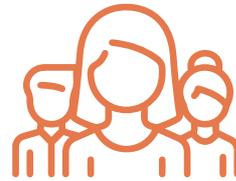
CREATE YOUR PERSONAS

When it comes to learner persona templates, there is no right or wrong and you'll find a multitude of examples on the internet that you can leverage as your starting point. Whichever template you use, ensure that learners' emotional states, see, hear, do, think, and feel, are well represented, and that you collect insights about the person that aren't work related. Lastly, pain points and needs are a must for every persona.

It can be daunting to add the data you have analyzed into a persona template, but if you have already identified some trends, start adding quotes and key words into the say, hear, do, think, and feel buckets in your template. To avoid adding your own interpretation, stay as close as possible to the learners' actual words. Once you have completed the learners' emotional states, you synthesize pain points and needs from the four buckets.

Once you have created all personas, you want to run them by your stakeholders, but also your learners to ensure that they see themselves in the fictitious character you have created.

Chapter Four

Do This, Not That!

Personas get us closer to understanding our target audience, but they aren't a catch-all solution. They won't work for every solution, and they have some pitfalls. Here are some best practices you should follow:

ONGOING OR LARGE TRANSFORMATIONAL PROJECTS

It's not worth your time to create personas if you are tasked with a 2-hour one-off training request. Ideally, you want to start work on your personas for any ongoing programs, such as onboarding or compliance training, or large transformational projects that have an impact on your entire organization. However, once you have your personas in place, you can easily leverage them for smaller projects. It's just not a good starting point because the time you spent creating personas will exceed the time it takes you to build the training.

DON'T LET STEREOTYPES TAKE OVER

We are aware of stereotypes but when working on personas, these take usually over very quickly. Be aware of these tendencies so you can create personas that reflect your typical learner, not what you think about the learner. Have a third party — someone who wasn't part of the overall creation process -- review the personas, with an eye for any stereotypes that might have found their way into your personas. On a similar note, ensure you don't create personas based on someone in the room with you. When creating personas, you can think about specific learners, but never translate their traits one-to-one into a persona.

CHECK PERSONAS ON A REGULAR BASIS

We can reuse personas but it's also crucial that you check them before we leverage them for new designs, because situations/needs may have shifted, strategic objectives have changed, or the program you are designing for has specific requirements. Either way, take the time to revisit personas and ensure they are up to date.

REFER TO PERSONAS BY THEIR NAME

When you start to design new learning programs, always refer to your personas. Ideally, refer to them by name to make them come to life (that's why it is so important to select a good name when you first create your personas, names will stick!). Ask yourself, what would Carl do? How would Anusha react to this? This is not only crucial when thinking about what delivery mechanisms might work well, but also for tone and voice when you write content.

USE PERSONAS AT THE PROGRAM OR ASSET LEVEL

You can use your personas at the program level. If you have a longer learner journey, decide the entry, and exit points for each persona, what assets are important to them when, and how to best deliver these. This way, you can create a lot of flexibility for your target audiences. If you have personas already in place and start work on individual assets, you can break out assets and personalize by changing, for example, the "what's in it for me," have examples that refer to your specific personas, or branch out the asset based on a learner's interest or pre-existing knowledge.

DON'T FORGET TO REPRESENT DIVERSITY

Present a mix of cultural backgrounds, ethnicities, abilities, and genders. All your employees should be able to see themselves in your learner personas so taking a critical look at your entire organization, and not just people you are surrounded by day-to-day will make a difference.

Finally, and this is most important of all, simply use your personas. This might sound obvious, but more often than not, organizations spend time and effort to create personas, then forget them the minute the conversation moved into learning experience design for specific programs.

Make a Real Difference
with Learner Personas

Learner personas have experienced a boom over the last couple of years. Sadly, persona creation often ends up being a checkbox exercise and isn't built into an organization's design DNA. Used correctly, personas allow you to identify meaning at work for your learners by identifying intrinsic and extrinsic motivators. Representing your typical learners by collecting demographic information and exploring their emotional states allows you to synthesize their needs and pain points, which you can then use in your design approach. Personas won't allow you to capture all the nuances of your target audience, but they will get you much closer than a traditional target audience analysis and remind you to put your learners' needs before your content needs. The process can be time-consuming, but it's well worth it if you leverage personas across your organization. Ensure stereotypes don't take over and revisit personas on a regular basis to align to learner and organizational changes.

Personas are the first step in your design process, and a critical step on the road to creating relevant content.

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ACCELERATING BUSINESS
RESULTS THROUGH LEARNING