Experiment 9

Create a Customer Sketch

A customer sketch is a simple exercise to begin characterizing customers and learn where you may lack information. It can also help guide the creation of a research plan and early-stage personas.

If your organization doesn't have a thorough understanding of target customers, use customer sketches as a best practice to clarify knowledge gaps before jumping into a comprehensive qualitative research process.

STEPS

1

If you've performed some of the other experiments in this workbook, start populating sketches from previous conversations with customers and front-line staff, and eventually complement them with information from previous research on:

Household structure
Places you may find customers (leisure or work)
Channels customers use to access information and interact
Interests and life aspirations

2

Use yellow sticky notes to write down what you know – and a different color to record what you don't.

3

Once you have a better idea of your knowledge gaps and strengths, use these customer sketches to strategize more effective screening criteria for your qualitative research plan.

TIME

1-2 hours

ROLES

Collective exercise

MATERIALS

Persona Profile
Sticky notes: 2 colors

EXPERIMENTS IN ACTION: REBOOT

The social impact organization Reboot created a series of user personas as part of an ethnographic research study to support program managers at a bilateral aid agency in using data more effectively. The team needed to understand what kinds of data were required and the reasons current data practices were insufficient. However, they wanted to understand these issues from the viewpoint of the program managers themselves.

Reboot created low-fidelity user personas – rough drafts that could be made quickly (as opposed to polished, high-fidelity materials shared with people outside the research process). Written on 3- x 2-foot paper sheets, the format made it easier for the team to collaborate as they organized details and sorted evidence across more than 40 interviews.

USE IT WHEN

- Before you begin the Starting with Your Customers section of the CGAP **Customer Experience Toolkit**
- Before you go into research planning and want to get more tactical about your outreach strategy for qualitative research

USE IT TO

- Organize your data collection for specific stakeholders or target customers

Reference: Reboot – An Inside Look at Design Tools in Development Work
User Personas in Context