




## How to create a Persona: model proposal based on the use of scientific research methods in a consulting project

*Como criar uma Persona: proposta de um modelo a partir do uso de métodos científicos de pesquisa em um projeto de consultoria*




*Cómo crear una Persona: propuesta de un modelo basado en el uso de métodos de investigación científica en un proyecto de consultoría*

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## ABSTRACT

**Goal:** To propose a buyer persona development model, using scientific research methodologies. **Methodology/approach:** Model built after carrying out a consultancy project in a large company in the financial sector. **Originality/relevance:** Offering academia and the market a teaching and management tool for effective persona development work. **Main findings:** Robust model built from methodological rigor and scientific techniques, for building *personas*. **Theoretical Contributions:** Offer the academic world a review of the state of the art on publications regarding the use and construction of *personas*. **Management Contributions:** Offer the business community a management tool built on scientific rigor, to improve their marketing decisions, involving analysis of consumers and target audiences.

**Keywords:** Persona. Buyer persona. Methodology. Consumer behavior.

## RESUMO

**Objetivo:** Propor um modelo de desenvolvimento de buyer persona, com o uso de metodologias científicas de pesquisa. **Metodologia/abordagem:** Modelo construído a partir da realização de um projeto de consultoria em uma grande empresa do setor financeiros. **Originalidade/relevância:** Oferecer ao meio acadêmico e de mercado uma ferramenta de ensino e de gestão para um trabalho efetivo de desenvolvimento de *personas*. **Principais resultados:** Modelo robusto construído a partir do rigor metodológico e técnicas científicas, para construção de *personas*. **Contribuições Teóricas:** Oferecer ao meio acadêmico uma revisão do estado da arte sobre as publicações referente ao uso e construção de *personas*. **Contribuições para a Gestão:** Oferecer à comunidade empresarial uma ferramenta de gestão construída a partir do rigor científico, para melhorar suas decisões de marketing, envolvendo análise dos consumidores e público-alvo.

**Palavras-chave:** Persona. Buyer persona. Metodologia. Comportamento do Consumidor.

## RESUMEN

**Objetivo:** Proponer un modelo de desarrollo de la persona compradora, utilizando metodologías de investigación científica. **Metodología/enfoque:** Modelo construido tras la realización de un proyecto de consultoría en una gran empresa del sector financiero. **Originalidad/relevancia:** Ofrecer a la academia y al mercado una herramienta de enseñanza y gestión para un trabajo efectivo de desarrollo de *personas*. **Principales Resultados:** Modelo robusto, construido a partir de rigor metodológico y técnicas científicas, para la construcción de *personas*. **Contribuciones Teóricas:** Ofrecer al mundo académico una revisión del estado del arte sobre publicaciones relativas al uso y construcción de *personas*. **Contribuciones a la Gestión:** Ofrecer a la comunidad empresarial una herramienta de gestión basada en el rigor científico, para mejorar sus decisiones de marketing, implicando el análisis de los consumidores y públicos objetivos.

**Palabras clave:** Persona. Persona compradora. Metodología. Comportamiento del consumidor.

## ■ INTRODUCTION

One of the main activities in the Strategic Marketing Management process is defining the target audience. In the Marketing literature, this activity is associated with segmentation, as a model composed of a series of tools that mainly structure the positioning of the business, the development of products and services, marketing channels, and communication strategies (Jenkinson, 1994; Laverie et al., 2020). Over time, the discussion about the importance of knowing the profile of consumers has gained ground in the Marketing literature, with studies on sociodemographic characteristics, decision-making processes, product and service selection attributes, among others, which allow the definition of consumer groups that will be targeted by the company in its strategies (Jenkinson, 1994; Solomon, 2023).

In this context, the market segmentation activity involves identifying population characteristics based on some factors (e.g., age, gender, income), to form groups that share common interests. The essence of segmentation work has been the classification of consumers through some objective criteria. However, this objective understanding of consumer behavior is limited to the extent that we understand that individual consumers are subjective beings, with behaviors, perceptions, sensations, emotions, tastes, meanings, among other individual aspects, which cannot be characterized and understood objectively (Arnould & Thompson, 2007; Bode & Ostergaard, 2013; Holbrook & Hirschman, 1982).

Therefore, one way to understand consumer subjectivities and allow for a more meaningful and experiential relationship, expanding the notion of segmentation and definition of the target audience, is through the construction of buyer personas. A buyer persona is a concept that originated in studies of user experiences (UX) in information systems (Blomkvist, 2022; Cooper, 1999), which aimed to design a product that met the needs and motivations of 'personas'. Thus, a persona is defined as "an accurate description of the system user and what they want to accomplish" (Cooper, 1999).

This concept, usually known simply as 'persona', has come to be used in studies, educational institutions, and in Marketing practice as a way of understanding subjective and in-depth aspects of consumers in order to improve marketing communication actions. Some benefits of its use include a better understanding of consumer needs and more persuasive communication by companies (Cooper, 1999). However, there are still some limits to its practical use (Klepek, 2019).

The concept of personas has been featured in several undergraduate and lato sensu postgraduate classes in the area of Marketing throughout Brazil and the support material used for teaching is based on websites and blogs, which do not necessarily follow scientific methods for their construction. In a search for reliable sources of prescriptive material for building personas, Klepek (2019) concluded that in most cases the protocols are limited and superficial, without using the scientific method.

It is no coincidence that we have observed that the personas developed by Marketing students and professionals are often ineffective in achieving their proposed objectives. They are biased, superficial, lacking identity and personality, lacking visual representation, with few effective characteristics for the decisions of Marketing professionals, and most importantly, they are not developed with real data; they are born from the individual conceptions of those who build them, such as assumptions about the consumer. See a fictitious example commonly used by companies, without the use of real data: Gustavo, 27 years old, has a degree in Architecture and works as a project manager in a construction company. He aims to grow in his career and get a promotion in 2 years to double his salary. He is researching specialization courses with classes on weekends, and is willing to travel up to 150 km to study. He enjoys going to bars and restaurants with friends and family, drinks alcohol weekly and usually takes an international trip every 2 years.

The use of this limited approach in the construction of personas can occur for two reasons. The first is related to the lack of scientific articles, especially in Portuguese, that explore the topic. The second involves the origin of the concept, which may consider fictitious elements in its construction. Regarding the first reason, we highlight that the concept of personas is beginning to be used more expressively due to the intensification of digital marketing activities, mainly with regard to content marketing activities. Thus, dozens of non-academic practitioners have launched prescriptive publications on websites and blogs to explain the importance of personas and teach how to develop them.

When searching with the keyword 'buyer persona' in the SPELL (Scientific Periodicals Electronic Library), SCIELO (Scientific Electronic Library Online) and ANPAD (National Association of Graduate Studies and Research in Administration) databases, we did not find any articles on the subject. When using only the word 'persona' in the search, articles in Spanish are found where the literal translation is 'person' and the articles are mainly from the health area, not representing the person as a buyer/consumer, which is the case of this discussion. In other words, there are no scientific articles in Portuguese on the use and construction of the buyer persona in the main national research search databases in the area of Administration. Thus, the misuse and application of the buyer persona concept occur in Brazil because when searching for material on the subject, teachers, students and practitioners find only non-scientific references, confirming the findings of Keplek (2019).

Regarding the second gap identified, foreign literature offers four perspectives for building personas. Three of them are data-based: the goal-oriented perspective, the role-oriented perspective, and the engagement perspective. The fourth perspective, called the fiction-based perspective, does not include data as a basis for defining the persona, defending its construction using the creator's perceptions, intuitions, and assumptions (Revella, 2015).

Apparently, the fiction-based perspective is the one mainly adopted by Brazilian professionals. From the point of view of its origin and purpose, the fictional persona is seen as a starting point for the design of experiences for users. However, when Marketing professionals use this approach for more in-depth and direct purposes of consumer relations, doubts arise as to whether the fictional persona is in fact capable of supporting assertive management decisions.

Considering the preferential use of the fiction-based perspective, the importance of using the scientific method in management tools, and the support for teachers in the classroom when teaching marketing and consumer behavior classes, the problem of this article takes on the challenge of verifying whether it is possible to develop a model for constructing a persona, based on a consulting project, with greater scientific rigor; since the current literature does not offer such a path.

Thus, the objective of this article is to propose a model for developing a buyer persona, using scientific research methodologies, based on a consulting project. With this, we hope to support students, teachers, and Marketing practitioners in constructing buyer personas in a more robust, reliable, and scientific manner, to better support their marketing management decisions.

In addition to this introduction, the article presents four other sections. The second is a review of the literature on buyer personas. The third section describes the development of 7 personas carried out from a consulting project in a large company. The fourth section proposes a prescriptive model for developing buyer personas. The fifth and final section presents the final considerations of the article.

## LITERATURE REVIEW

### Origin of the persona concept: from Technology to Marketing

The concept of persona was originally introduced by Alan Cooper, a design and interaction consultant in the technology sector (Blomkvist, 2022). One of the many functions of the design and interaction professional is to optimize the relationship between the user and information systems. According to Cooper (1999), the user's personality is important and the concepts commonly used such as 'user', 'user-friendly' or 'designed for the user' were too vague and were not effective in facilitating communication between teams of software developers.

The simple concept of the user is very broad and can be used for almost any type of project, the result of this is a final product without objectivity, which can be used by any type of user in undefined contexts. Cooper (1999) labels this phenomenon as an elastic user, that is, one who has multiple needs and motivations, which is not enough to characterize a person who can effectively use the system. Cooper (1999) suggests designing systems for an individual with specific characteristics, the persona. The more specific the persona, the more effective the management decisions made based on it will be. With more detailed and individual characteristics, the persona becomes a real person in the minds of developers.

Cooper (1999) emphasizes that a persona is a communication and design tool for a group of developers, software engineers, IT managers, and the clients of the projects themselves. The goal is not to provide an accurate description or a complete theoretical model of a user. Instead, it aims at a simple but good enough description of the user to enable the development of a more effective system (Cooper, 1999).

In the 1980s, Allan Cooper decided to conduct interviews with potential software users before programming them. All the relevant information

obtained in the interviews was condensed to build a specific user type, which he called “Kathy”. When programming the software, he thought about possible concerns and expectations, imagining Kathy’s reactions to the solutions he was developing (Bauernfeind, 2018).

With the improvement of market segmentation and target audience definition techniques, in addition to the need to understand consumers’ subjective characteristics, marketing professionals realized that this process of deepening consumer profiles brought benefits to communication and relationships (Ex.: Aimé et al., 2022; Leão, 2018). Thus, the concept of persona also began to be used in the marketing area, especially in the digital marketing environment (Akre, 2019).

If for the technology sector the persona is a tool to contribute to the development of software and communication between developers, for the marketing area the persona is a tool to contribute to the development of new products, distribution channels and communication between the company and its customers (Leão, 2018). Since understanding consumer needs to create value is one of the most traditional characteristics of the Marketing concept (Solomon, 2023), the use of personas is recognized as having the potential to deepen knowledge about consumers and assist in decision-making.

In addition, with the emergence of content marketing as a way to capture new customers and create engagement with the market, the persona also becomes more present in the minds of content creators on blogs, websites, and social media (Mattinen, 2016), who began to work with inbound marketing strategies (Montero et al., 2024). In this marketing context, when the persona assumes the role of buyer, the term ‘buyer persona’ is also used. Thus, we can identify the concept of persona as having originated in information technology studies and adapted to the marketing context, being widely used, especially by practitioners.

## Theoretical perspectives and definitions of the concept of (Buyer) Persona

A pioneer on the subject, Cooper (1999) defines persona as an accurate description of the user and what he or she wants to accomplish. Calde et al. (2002) detail the concept by adding that user models or personas are fictional and detailed archetypal characters that represent distinct groups of behaviors, objectives, and motivations observed and identified during the research phase. Furthermore, for Pruitt and Adlin (2010), the buyer persona is a fictional, specific, and concrete representation of the target audience. They are usually presented through a character based on sociodemographic data. We consider this simple description as a profile of the target audience, something less detailed than the buyer persona.

Revella (2015) describes personas as examples or archetypes of real buyers that allow marketers to create strategies to promote products and services to people who can buy them. For Bauernfeind (2018), the main objective of the persona concept is to provide the right information at the right time and to use the right way to approach customers. Therefore, another essential objective is to combine the marketing and sales strategy with the information identified from the persona.

Leão (2018) argues that the objective of generating a persona is to develop a solid representation of the target audience, using fictional



characters to represent behavioral patterns that can help in better understanding the values and attitudes of this group of people. Buyer personas are semi-fictional profiles that represent a segment of buyers of a product or service (Leão, 2018).

According to Muurimäki (2021), buyer personas allow marketers to develop strategies to promote products and services to a group of people more likely to make purchases. They can be presented in slides, posters, infographics and even augmented reality avatars to improve their visualization and increase their realism. As a result, marketing decisions become more personalized, personified, and accurate (Muurimäki, 2021).

Other authors have struggled to define what a persona is (Caballero et al., 2014; Guo et al., 2011; Hisanabe, 2008; LeRouge et al., 2013). However, Leão (2018), when reviewing publications on the subject, clarifies that existing publications are mixed in book chapters and articles in the area of Technology and Marketing, and are still largely fragmented and diffuse. Given this, it is possible to understand that there are different theoretical perspectives of the concept.

These theoretical differences may be the result of approaches to the construction of personas identified over time. Nielsen (2012) argues that there are four perspectives for understanding personas: objective-centered perspective; role-based perspective; engagement perspective, and fiction-based perspective.

The goal-centered perspective, which follows Cooper's (1999) line, defines the persona considering their personal, practical and company-related goals, as well as their emotions when using the product. With this, this perspective develops the persona based on the user's goals. As a data collection method, a survey based on ethnography and a funneling method are proposed, starting with a greater variety of personas that are gradually eliminated until a final persona is reached for each user. This perspective, despite being based on qualitative methods, is criticized for directing the vision of personas in an extremely utilitarian way, basing their description on the objective relationships that the individual builds with the company (Nielsen, 2012).

The role-based perspective, which is based on the thoughts of Pruitt and Adlin (2010), considers that there must be a clear relationship between the data and the personas described, advocating for greater depth and variety of information for their description. Therefore, although it is still focused on the objective, it adds the importance of behavior in understanding the persona. In criticism of the previous model, this perspective addresses the different roles that the consumer can assume in their relationships with the organization. The role-based perspective is built based on large volumes of data, using quantitative and qualitative research to complement information (Nielsen, 2012).

The engagement perspective, proposed by Nielsen (2012), proposes an even deeper view of individuals, using their stories to promote involvement and insights. In this way, in addition to understanding objectives and behaviors, this perspective assumes an interpretive stance, considering the complexity of individuals, involving psychological, emotional and experiential characteristics. The results are personas that are closer to real individuals. According to the author, this perspective allows for greater engagement by

the professional who will use it, allowing for the understanding of intrinsic characteristics of individuals.

Finally, the fiction-based perspective is the one that comes closest to the approaches currently seen among marketing practitioners in Brazil. This approach uses ad hoc personas, built by intuition to provide a basis for initiating design projects. In this sense, the persona is not a result of research and analysis, but rather the perception of professionals who have some experience in dealing with the individuals represented by the persona. Although this perspective has its value, especially as a starting point for understanding elements that may be important in the persona and its low cost, it is widely criticized for its superficiality, due to its limited construction method (Nielsen, 2012).

Given these different approaches and the diffuse concepts about personas, for this article in the context of Marketing, we consider a persona as an accurate description of the consumer, contextualized for its construction. It is an accurate description because it must involve empirical elements of the consumer, understand him in his essence and comprehensively reflect his characteristics, both objective and subjective. It is also contextualized because it describes in detail and accurately a group of individuals from a market segment with common characteristics and objectives. Therefore, the definition and use of the persona must be directed to a specific context in the organization, such as a relationship campaign, a product, a communication action, among others. The more specific the context, the greater the accuracy of the resulting persona.

It is also worth highlighting the difference between a persona and a target audience. While the target audience is more generalist, as it takes into account common data from a broad segment of people, the persona goes deeper and provides individual and humanized information that takes into account situations and facts from people's lives. The target audience represents a group of people with eminently sociodemographic characteristics, the persona represents an individual with their personality, frustrations, fears, expectations, desires and lifestyle.

## **METHODOLOGICAL APPROACHES IN THE CONSTRUCTION OF PERSONAS**

In an even more fragmented way than the concept, it is possible to find some guidelines on how to build a buyer persona. Goodwin (2001) suggests that a description of the persona should be presented in one or two pages, containing objectives, skills, attitudes, environmental context, and some fictitious personal details, to bring the persona to life. For the author, the number of personal data should be balanced. In addition, many personality traits are welcome and few personality traits can generate generic personas.

On the other hand, one point of attention is the concern with the amount of information used. Although the persona can be built in a more or less detailed way, it is suggested that the presentation of the persona be succinct and its visualization easy and quick. Blomkvist (2022) states that the description of a persona does not need to be exhaustive, countless possibilities fit into the characterization of a character, making it impossible to



present them quickly and objectively. Therefore, personas must be created for a specific purpose. Using the same persona for different purposes can be a mistake since it is not possible to cover all possible characteristics in one or a few characters.

Regarding the use of data, according to Bauernfeind (2018), buyer personas are built with qualitative information added to existing consumer data, such as sociodemographic data. The author points out two main ways of developing personas, the first being a guessing game and the second based on qualitative interviews.

The so-called guessing game, in other words, is the construction of personas based on prior knowledge and the feelings of some company employees, associated with a perspective based on fiction. In the Administration area, the feeling is not just an unfounded opinion, based only on what the person thinks; this feeling is loaded with previous experiences and knowledge, both explicit and tacit, within organizations (Nonaka & Takeuchi, 2007). Through meetings, professionals build personas with their respective characteristics. This construction methodology, which is carried out through the brainstorming technique, is used in the fiction-based perspective (Nielsen, 2012). Even though it allows for different types of employees in the construction process, there is still an eminently internal bias and it disregards any type of use of external data about the company's customers (Bauernfeind, 2018).

The second approach is based on the qualitative method, using in-depth interviews with the company's customers. The creator of the Buyer Persona Institute, Revella (2015) suggests conducting eight to ten interviews with people who are involved in the purchase decision process. The interviews should not be standardized, allowing for the joint construction of the discussion between the interviewer and the interviewee. The main objective is to obtain a specific narration from the interviewee about the entire process and reveal insights to define the persona's motivations, needs, and expectations (Bauernfeind, 2018).

Qualitative data collection techniques can be associated with the perspectives based on objectives and engagement roles. The goal-centered perspective has a use-oriented view and proposes data collection through observation and qualitative interviews. Nielsen (2012) argues that this approach uses ethnography to collect data from individuals. The role-based perspective proposes the collection of qualitative data in conjunction with quantitative data. However, qualitative data still focuses only on behavior. Finally, the engagement perspective proposes interpretative qualitative research, involving more subjective and intrinsic aspects of individuals.

In turn, the quantitative method with the application of surveys is also a common way to collect and analyze data for the development of personas. By using factor analysis (exploratory and confirmatory) and cluster analysis (hierarchical and non-hierarchical), it is possible to extract from statistical software some groupings of variables and individuals that suggest the formation of some groups, which can form personas. This is quite common in target audience analysis. However, since their characteristics are defined a priori to data collection, when preparing the questionnaire, regardless of the result that these statistical analyses suggest, they are carried out on pre-established variables, standardizing their characteristics, not allowing for the broad exploration of expectations, feelings, motivations, needs, and other additional variables.

In addition, in a systematic review of the subject, Leão (2018) points out other examples with the use of databases, workshops, field research, ethnography, survey research, big data, social media, website analysis, and automation. An important point about the different methodologies used and proposed is that they largely originate from studies of software user experiences. To adapt them to consumer studies, it is necessary to consider the differences in contexts. This is where the main problems of validity, reliability, and usability of these results arise. The following table summarizes the information about the perspectives for constructing personas and their characteristics regarding the elaboration methodology.

**Table 1.**

Conceptual and Methodological Approaches to Building Personas

Approaches	Description	Focus	Proposed methodology	Techniques
1. Goal-centered perspective	Experience in using the product	Utilitarian, purpose of use	Qualitative	Observation and interview
2. Role-based perspective	Different roles a user can perform	Pluralist, behavior	Mixed	Survey and interview
3. Engagement perspective	Life stories, symbolic experiences	Interpretativist	Qualitative	In-depth interviews
4. Fiction-based perspective	Construction based on intuition	External perception	Brainstorming	—

With this, we conclude that although there are some scientific guidelines for the construction of personas, they are still fragmented and in most cases are based on literature from the Technology area, which brings limits to understanding and association with the Marketing area.

## Recent articles on Buyer Personas

In the search for the state of the art on the subject, a survey was conducted on the platforms made available by the CAPES (Coordination for the Improvement of Higher Education Personnel) portal, using the knowledge area filter 'Applied Social Sciences' and sub-area 'Public and Business Administration, Accounting Sciences and Tourism'. The table below presents the summarized information on the approach of each article and indicates the target audience of each publication.

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Table 2.

Recent articles on Buyer Personas

Authors	Description	Practitioners	Researchers	Professors	Students
Cruz & Karatzas (2019)	Using buyer personas to create a digital presence and improve customer relationships.	✓			
Filipov (2019)	Development of a buyer persona based on a questionnaire applied to participants of a dance event in the Netherlands.		✓		
Ibanez (2019)	Didactic proposal for Marketing classes in the context of product development, as a teaching method, in Spain.			✓	✓
Klepek (2019)	Analysis of online information sources about buyer persona in the context of marketing communication, highlighting the methodological limitations of the material found.		✓	✓	✓
Hu & Olivieri (2020)	Content marketing and social media management considering the customer journey and the different types of personas in the hospitality sector, carried out in Italy and France.	✓			
Laverie et al. (2020)	Construction of the buyer persona as skills required by the job market in the United States to achieve certification and qualification to work with digital marketing.	✓			
Magnani & Re (2020)	Suggestion for building personas for car sharing market practitioners in Italy.	✓			
Mc Dougal (2020)	Classroom skills development for students to improve their ability to analyze target audiences, using storytelling as an active learning method, in the United States.			✓	✓
Benítez-Coll & Barrio-Menoyo (2021)	Creation of a buyer persona based on the analysis of experiential marketing strategies and customer experience, among the millennial generation, in a hotel chain in Spain.	✓			
Lendvai et al. (2022)	Using personas to differentiate different behaviors and attitudes towards the LOHAS model among young people from Generation Z in Hungary.		✓		
Fernández-Cejas et al. (2022)	Development of a CRM (Customer Relationship Management) System using the buyer persona as a customer classification criteria in a hotel chain in the Canary Islands (Spain).	✓			
Presente artigo	Construction of personas based on a consulting project in a large company using multiple data collection and analysis methods.	✓	✓	✓	✓

The objective of the table is, firstly, to analyze the state of the art on the subject, seeking new theoretical and methodological alternatives on the construction of buyer personas. Secondly, the table also shows the contribution of this study which, with the use of more rigorous scientific methods, can meet the interests of all the analyzed audiences: practitioners, researchers, teachers, and students.

It is noted that the main audience of recent publications is practitioners since personas have consolidated themselves as a tool for analyzing companies' consumers (Ibanez, 2019). Above all, in the digital context, the use of buyer personas is more present, according to Cruz and Karatzas (2019) and Laverie et al. (2020).

Publications aimed at the academic context involve more sophisticated analyses and language that is less accessible to practitioners and the classroom context (Filipoc, 2019; Fernández-Cejas et al., 2022). The articles aimed at teachers and students propose to present the persona as a learning tool and a way of developing skills to prepare for the job market (Ibanez, 2019, Klepek, 2019; Mc Dougal, 2020).

This article has an innovative proposal, as it seeks to contribute directly to the four audiences. As for practitioners, in addition to presenting a detailed consulting case, we propose a model for developing personas that can be adapted to each context. For teachers and students, the fact that it has a case and a step-by-step guide, the article presents itself as an excellent form of active learning methodology, since the use of the model can be applied in any discipline in the area of Marketing or Entrepreneurship. As for academic researchers, we conduct an extensive review of the literature (recent and current) on the subject and show how the use of the scientific method can approach the market.

## ■ DEVELOPED CASE IN A LARGE FINANCIAL INSTITUTION

Based on a consulting project for a large company, herein referred to as a financial institution to ensure anonymity and corporate confidentiality, we developed 7 personas using different data collection and analysis methods. The company has around 700 employees and a base of over 150,000 customers. They requested the creation of personas with the main purpose of improving communication. With a heterogeneous base, communication was often generic; when specific, it targeted a small group of people, but the entire base received the communication, causing noise and dissatisfaction.

This section aims to describe the stages of the project and present the personas developed. The data collection and analysis project was carried out in 4 steps, all of which were inspired by classic scientific data collection methods, as well as by the literature found on buyer personas: (i) Focus group with employees (Nielsen, 2012; Bauernfeind, 2018); (ii) In-depth customer interviews (Goodwin, 2001; Revella, 2015); (iii) Quantitative research (Leão, 2018; Filipov, 2019); and (iv) Verification and validation with projective techniques (Blomkvist, 2022). This process took place over 5 months, from November 2020 to February 2021.

### Step 1 – Focal group with employees

Due to the company's size, extensive departmentalization, and numerous points of contact established with customers, we first conducted six focus groups with employees, with the objective of exploring the company's dynamics and the relationship established with customers. The interview scripts were constructed considering the necessary questions for this purpose, involving the department's main activities, its points of contact with customers, the reasons for contacting customers, possible customer satisfactions and dissatisfactions, and the customer profiles they serve.

The groups were composed of employees from seven departments, had between three and six members, and totaled 22 participants. Due to

scheduling difficulties, some groups were homogeneous (participants from the same department) and others were heterogeneous (mixing participants). All focus groups were conducted via video calls due to the pandemic. The focus group questions had the main objective of understanding the profiles of the company's customers, from the employees' perspective. They were prepared based on the work activities of each group and the points of contact that each of them had with customers. Additionally, due to the size of the company, the focus group also helped the researchers gain a deeper understanding of how the organization works.

The data collected in the interviews were recorded in files and analyzed using content analysis without pre-established categories. The goal was to identify aspects of the personas that could be explored in the next steps. The main results of this step consisted of clarifying the company's business model, the different customer profiles, and the relationship established with them. Because it has a differentiated product portfolio and a very heterogeneous customer base, this initial immersion step was essential for the authors to get to know the company and its customers in more detail.

Some initial traits of personas emerged at this step, temporarily named: elderly, future, lucky, mother, working woman, young, head of family, unaware, and housewife. Furthermore, the results of step 1 contributed to the development of the semi-structured script to be applied in in-depth interviews with customers in step 2.

Before the start of step 2, we had access to the customer database, which contained general information about customer profiles, types of relationships, and consumption patterns. This data was used to triangulate the findings of the first step and refine the questions in the interview script.

## Step 2 – In-depth interview with customers

To conduct the interviews with customers, we created an interview script with 22 questions, divided into 5 sections: profile and lifestyle, types of service packages, use of contracted services, customer service, and perception of the value of the services provided. The questions were prepared according to the results of the focus groups held in the next step, with the participation of the customer relationship department, which requested the consulting project. The questions mainly included questions about the characterization of the services provided by the company, customer satisfaction, and the points of contact in their journey.

Thirty-nine individual interviews were conducted, of which 17 took place over the phone and 22 were in person, at the company itself. For those that were conducted at the company, an exclusive room was made available for the interviews, customers were invited to participate voluntarily and were selected based on the distribution of the initial profiles proposed in step 1.

The results of this stage were analyzed through content analysis based on the initial traits of the personas identified in step 1, allowing for the refinement of the personas. With this, we arrived at the result of 7 individuals with significantly different personalities and needs. The objective was to develop personas that represented the majority of the customer base, but without worrying about being exhaustive, as indicated by Blomkvist (2022), considering a broad base of approximately 150 thousand customers. The table below summarizes the 7 personas developed in step 2.

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**Table 3.**

Personas and main features

Name	Profile	Age	Description
João	Conventional elderly	75 years	Loyal customer who has little interest in using digital platforms.
Claudia	Technological elderly	62 years	Active client who, although having some difficulties, has good acceptance of technology.
Pedro	Entrepreneur	45 years	It represents a legal entity, which demands a lot from the institution, but is also highly profitable.
Lais	Prospect	22 years	Young man with little income, but with the potential to be a great client in the future.
Tereza	Irritated	51 years	An unhappy customer who complains about everything, in addition to bringing little profitability.
Carlos	Householder	42 years	Head of family who has a medium-high income and usually buys several products/ services.
Gabriel	Susceptible	33 years	Low-income client, in debt and with little knowledge about personal finances.

**Note.** Data sensibly altered to preserve the institution's anonymity.

Other information was also included in the description of the personas, such as: daily routine, degree of technological autonomy, friendliness, knowledge about personal finances, global and national brands that represent them, local establishments they frequent, opinion about the institution's strengths and weaknesses, reasons for staying or leaving the institution and which communication channels they use the most. In addition to deepening and refining the persona's characteristics, this stage also contributed to the development of the questionnaire that was applied in the next phase through quantitative research.

### Step 3 - Survey

The main objective of this stage was to detail the characteristics of the personas in line with the scope they would present in relation to the company's customers, allowing for better guidance for decision-making. 46 questions were created, divided into 6 sections, namely: the profile, service package, relationship with the institution, financial planning, consumption patterns, and perception of value.

The survey was stratified by 4 variables: gender (2), age group (3), type of service package (2) and ownership (2). Thus, 24 subgroups were generated (2x3x2x2), making it possible to extract the correct proportion for forming the sample, based on the database shared by the company. The collection was carried out by sending emails, and WhatsApp messages, and with the help of prior telephone contact. The questionnaire questions were prepared based on the results of the individual interviews from the previous stage, as well as with the participation of the company's customer relationship department. The objective was to evaluate the characteristics of the profile used to build the personas, as well as purchasing and service consumption habits and behaviors.



In total, 433 questionnaires were considered valid, allowing for a 95% confidence interval and a 4.7% margin of error. The results were analyzed using descriptive and frequency statistics (Field, 2013) and contributed to strengthening the characteristics of the personas with quantitative information. The following table presents some of this information for illustration purposes.

**Table 4.**

Personas and main quantitative results

Persona	Resultados quantitativos
João (75) Conventional elderly	<ul style="list-style-type: none"> <li>■ 66% have already used the APP at some point, 28% of those over 60 years old.</li> <li>■ 42% need help to solve problems, 61% of those over 60 years old.</li> </ul>
Claudia (62) Technological elderly	<ul style="list-style-type: none"> <li>■ 23% of people over 60 are inclined towards new technology, 80% of them are women.</li> <li>■ Among people over 60 who prefer to go to the agency, only 30% are women.</li> </ul>
Pedro (45) Entrepreneur	<ul style="list-style-type: none"> <li>■ 82% of legal entities are represented by men, most of them between 30 and 49 years old.</li> <li>■ The institution's overall NPS is 38%, among legal entity representatives it is 24%.</li> </ul>
Lais (33) Prospect	<ul style="list-style-type: none"> <li>■ 41% of customers consider themselves digital, among those under 30 years old this figure is 81%.</li> <li>■ 38% of customers remember seeing a digital advertisement from the company, among those under 30 years old this figure is 60%.</li> </ul>
Tereza (51) Irritated	<ul style="list-style-type: none"> <li>■ Among the people who said they were dissatisfied or very dissatisfied with the company, 60% mentioned the delay in service as the main reason.</li> <li>■ 40% of people with a negative NPS indicated that fees were the main reason for dissatisfaction with the company.</li> </ul>
Carlos (42) Household	<ul style="list-style-type: none"> <li>■ Among the people who have more than 3 products/services with the institution, 80% are married men with children.</li> <li>■ Among the people who have life insurance, 87% are men.</li> </ul>
Gabriel (33) Susceptible	<ul style="list-style-type: none"> <li>■ Among the people who admit to having difficulty paying their credit card bill, 31% are from class C, 36% from class D and 22% from class E.</li> <li>■ Among the people who say they do not carry out financial planning, 70% have an income of up to 4 minimum wages.</li> </ul>

**Note.** Data sensibly altered to preserve the institution's anonymity.

We can see that at this stage, the personas gained a specific identity, including a name for their identification. In some cases, the names used were those remembered by the company's employees in the first stage of data collection. This would facilitate the understanding of the customer profile to which the persona referred. The complementarity of quantitative data with qualitative information also served to allow for appropriate targeting of communication in databases and targeted actions.

## Step 4 – Verification and validation with projective techniques

After refining and confirming the characteristics of the personas, the fourth and final stage was carried out with the aim of verifying and validating the results. Given the complexity of the project and the size of the client base, the verification and validation stage consisted of presenting the personas in detail to experienced management-level employees.

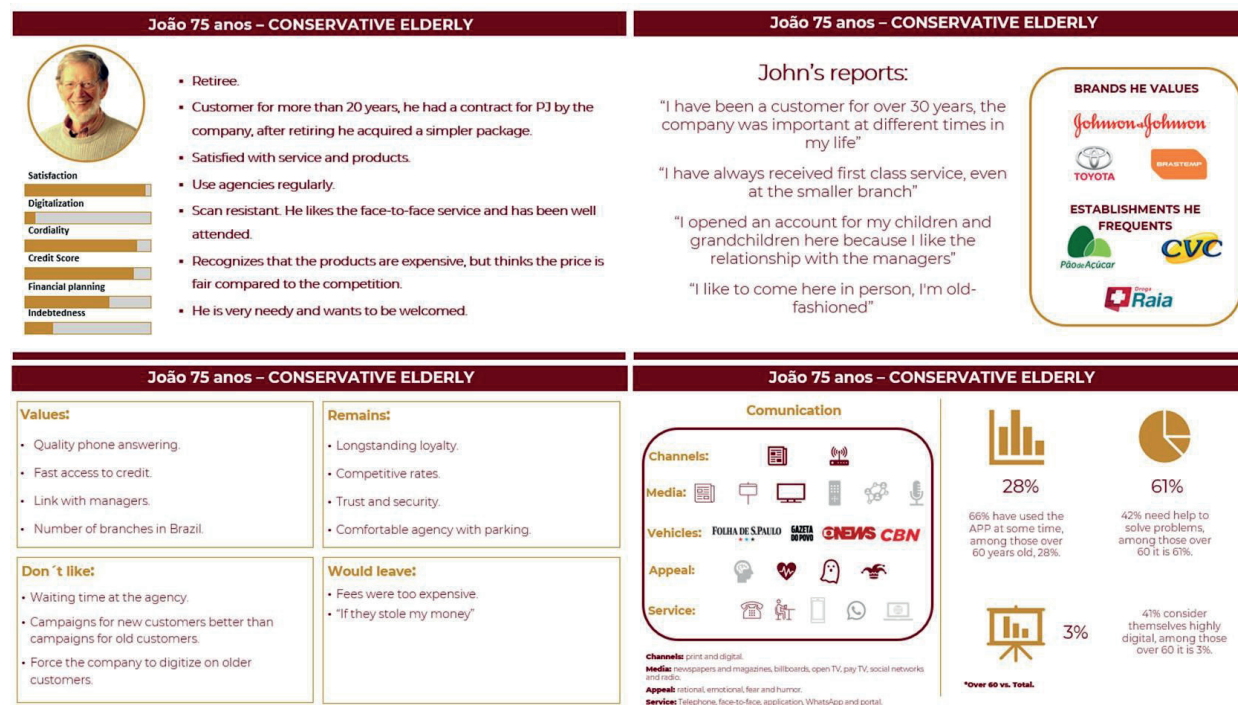
We asked the interviewees if they could visualize real people from those 7 personas in conventional situations in the company. They all pointed out some small adjustments, but agreed that there were many clients with

## How to create a Persona: model proposal based on the use of scientific research methods in a consulting project

profiles similar to those created in the consulting project. Each persona was presented in four slides, as illustrated in Figure 1.

**Figure 1.**

Representation of one of the seven personas



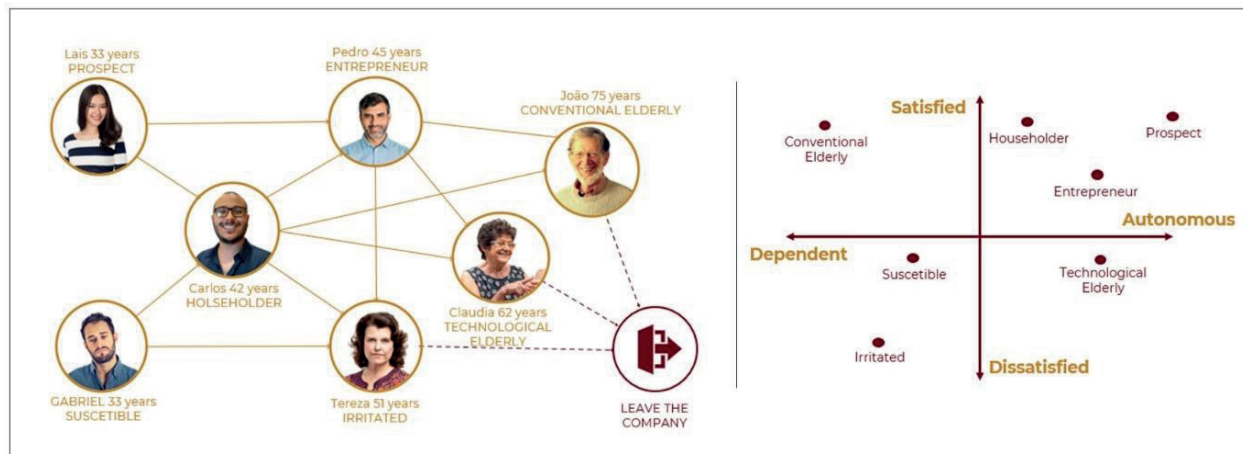
**Note.** Data sensibly altered to preserve the institution's anonymity.

After validating the personas, the adjustments were made and we arrived at the 7 final personas. Additionally, this stage allowed the construction of the customer journey, as shown in Figure 2 (Edelman & Singer, 2015; Lemon & Verhoeff, 2016). Like the 7 personas, this journey is not exhaustive and definitive, but it represents the behavior of customers well over years of relationship with the company. The journey contributes in several ways to the financial institution, such as avoiding the path to dissatisfied customers, encouraging the path to profitable customers, and monitoring customer behavior over time.

Along with the customer journey, some perceptual maps were also created to facilitate the visualization of the personas from the same perspectives. Figure 2, for example, distributes the 7 personas on a map where the variables are satisfaction (high x low) and autonomy to solve problems (high x low). Two other maps were created, one crossing the variables satisfaction and digitalization and another crossing the variables autonomy and digitalization.

Figure 2.

Journey and mental map



**Note.** Data sensibly altered to preserve the institution's anonymity.

In the end, the project was presented twice to the company, once to the marketing team and once to the board of directors. In both situations, it was possible to perceive great enthusiasm and approval of the entire project. As these are people with a lot of experience who deal with customers on a daily basis, they felt that the personas would in fact facilitate various communication processes and direct marketing decisions.

## PROPOSAL OF A PERSONA DEVELOPMENT MODEL

To fill the gaps identified in the introduction, based on the literature review and the project carried out at the financial institution, we propose a generic model for developing personas, to be implemented using scientific methodologies for data collection and analysis. This way, we prevent students and marketing professionals from relying solely on non-scientific texts. The application of scientific methods to build personas has greater potential to provide valuable information to decision-makers. Figure 3 illustrates the ideal model proposed for developing personas.

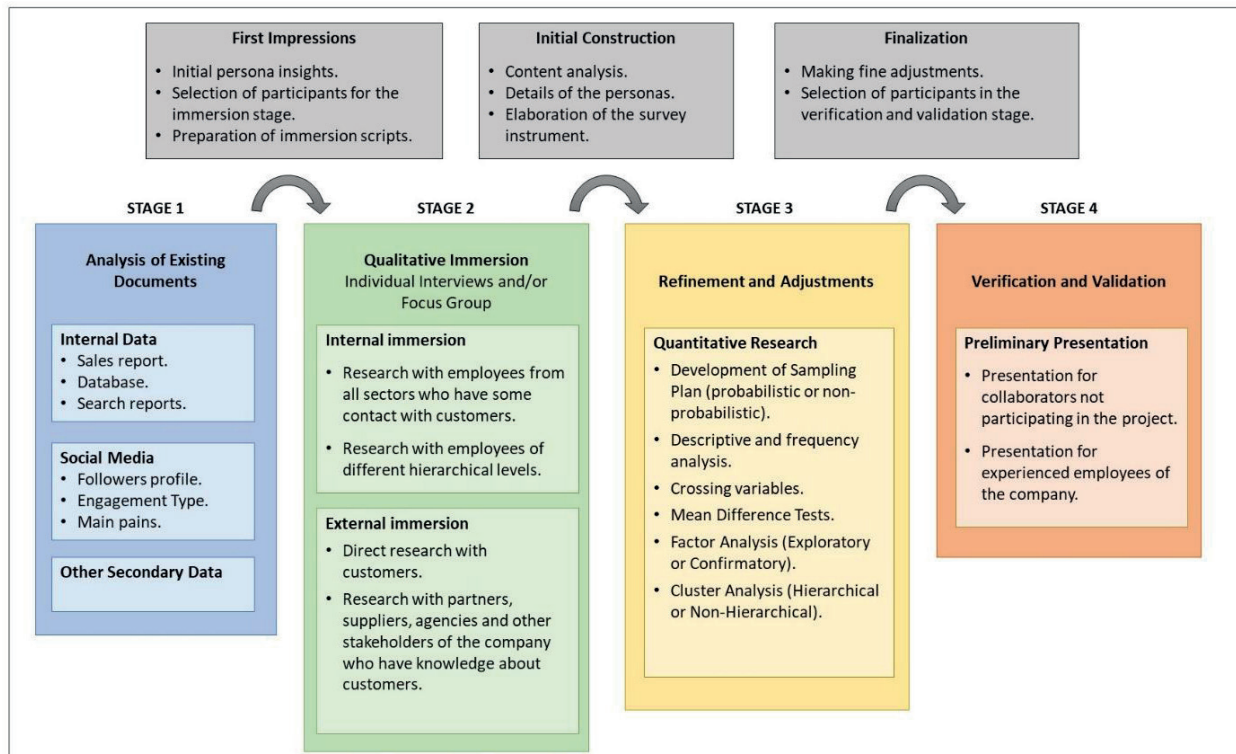
We call it the ideal model because we are aware that it will not always be possible to follow all the steps. Due to the rigor and complexity of the model, many steps and micro steps were included. On the other hand, in some cases, companies may not have all the information present in the model. The steps complement each other in three processes: initial impressions, construction, and finalization. These three processes must be implemented, regardless of the specific conditions of the project. What may vary are the methods and techniques for collecting and analyzing data to reach the result, depending on the specificity of each context.

We believe that, in the worst-case scenario, at least two of the steps need to be completed so that the personas are not superficial or vague, preferably with the qualitative immersion phase. Completing three of the four steps already enriches the data analyzed. Carrying out the complete

project will certainly result in custom-built personas, with a high degree of reality to achieve the proposed objective.

**Figure 3.**

Persona development model



## ■ ANALYSIS OF EXISTING DATA

Before investing efforts and financial resources in collecting primary data, analyzing existing data helps to initiate the project and improve collection in subsequent stages (Chiusoli & Ikeda, 2010). There is a lot of data already collected and even processed within companies, but it is often fragmented across different sectors. Organizing and analyzing this data is a prerequisite for starting to build personas.

At the same time, social networks bring together hundreds or thousands of consumers who represent the personas to be built. There are many customer characteristics on these digital platforms that will certainly be present in the result of the personas. Performing a prior analysis of all this content that already exists can save some later effort and improve the following stages. At this stage, the first versions and impressions of the personas will already be detected.

## Qualitative immersion

This is one of the most important phases of the model, as it is where the main in-depth information will be collected. Research with employees and customers themselves may be conducted in the form of individual interviews or focus groups. Depending on the size of the company, employees from different sectors may need to participate in the project, as they have different interactions with customers. Interviews with employees will serve as a basis for developing scripts for interviews with customers and predefining possible personas and their characteristics.

In addition, research with customers themselves should also be conducted. Naturally, employees may present some biases in their speech and present a partial view of customers' emotions, perceptions and preferences, so having direct contact with customers is a fundamental task. It is important that interviews with customers explore subjective issues and have an interpretative character, as this is what differentiates personas from the concept of target audience.

Therefore, at this point in the project, it is already possible to triangulate data, given the amount and variety of information collected (Abdalla et al., 2018). At this stage, the personas begin to take shape in a more concrete way and receive specific characteristics of their needs, expectations, emotions and feelings. This stage also contributes to the preparation of the questionnaire for the next stage.

## Refinement and adjustments

This stage consists of quantitative research to include more specific information in the list of characteristics of the personas. Although not mandatory, more robust statistical analyses are welcome at this stage. Factor analysis can group common characteristics, cluster analysis can group common individuals, and mean difference tests can highlight attributes between groups with different profiles (Field, 2013).

In addition, quantitative research can generate additional reports for the requesting company to use in other areas of work in the marketing area. The sample does not necessarily have to be probabilistic, as long as it significantly represents the personas suggested in the previous stage. A non-probabilistic sample is sufficient for this data collection, which, together with the others, will result in a rich and varied database.

## Verification and validation

Finally, a verification stage with more experienced professionals from the company contributes to the conclusion and validation of the constructed personas. One of our criticisms of the construction of personas without rigor, commonly carried out in the market, is due to the fact that biases of stakeholders overlap in the project. A stage like this allows the reduction of these biases and increases the credibility of the project to achieve a well-executed final work.

Analyzing the proposed model, the first impressions process involves the initial survey necessary to generate insights about the possibilities of the



personas. This process, which largely involves the use of secondary data and perceptions of employees, highlighted in stages 1 and 2, can be associated with the survey carried out by the fiction-based perspective (Nielsen, 2012). It is usually only through this stage that the personas have been constructed. Therefore, it is an important phase, but not the only one and far from being sufficient for the construction of personas that are consistent with the reality of individuals.

The construction process involves the stages of collecting and analyzing primary, quantitative and qualitative data, highlighted in steps 2 and 3. In-depth qualitative data analyzed in an interpretative manner, followed by quantitative data that help to broaden the understanding of the personas, contribute to an accurate and contextualized view of the personas. Finally, the finalization involves necessary adjustments in the personas' validation processes for the purpose for which they were created.

Therefore, by making a comparison with the existing literature, discussed in the theoretical framework, we consider that the model broadens the discussion and proposes a methodology that favors data triangulation and, therefore, offers greater validity and reliability to the personas' results. The model, therefore, provides a didactic and clear structure for the construction of complete personas, based on empirical data and with validation processes.

## ■ FINAL REMARKS

In this paper, we propose a model for building personas based on data, in an attempt to fill a theoretical-empirical gap in the academic-marketing environment. The development of personas has been used by companies of different sizes and segments to guide marketing decisions. However, the lack of robust literature and scientific methods means that the fictional approach is the most widely used in this task. This limited approach can lead to inadequate decisions (Klepek, 2019). We believe that this model has a lot to contribute to marketing theory and practice, especially after its application in a large consulting project.

From a theoretical point of view, we did not find robust literature that methodologically clarifies the construction of personas. The literature presented proved to be fragmented and not exhaustive. Thus, the main contribution of this article is to align perspectives and broaden the discussion on its use in the area of Administration, especially in the area of Marketing and Consumer Behavior.

From a practical point of view, the work can help teachers in undergraduate and lato sensu graduate classrooms to deepen concepts and apply persona building activities, based on academic and scientific knowledge. Instrumental protocols and prescriptive solutions are shared without moderation in the business environment, sometimes without due review, evaluation and validation. Having an academically appreciated model reinforces the importance that scientific activity has in contributing to society and the business community.

In addition to the scarcity of publications to support the theoretical framework of the article, other limitations can be pointed out. The first



of these is the complexity of the project. Students or practitioners often do not have the time necessary to carry out all the data collection and analysis, which makes its implementation difficult. The second is the need for people with research skills to carry it out. While the model has the advantage of being rigorous in its scientific method, its implementation must be carried out by someone who has at least some knowledge of the method. This is not a disincentive to its use; it is an incentive to carry out good and rigorous work, which will result in more realistic personas that will contribute to the decisions made within companies.

Furthermore, we would like to highlight that the model is not rigid. Each company has different characteristics, such as size, sector, stage, region, type of product, employee characteristics, customer profile, among other issues. All of these elements can influence the way data is collected and analyzed. Therefore, adaptations in the use of the model are welcome, as long as the methodological rigor is maintained for its implementation. In the end, it is expected that users of the finalized personas will feel that they have a real customer to inspire them and create their products, campaigns, and projects.

It is also worth noting that this work is biased towards having been carried out in a single organization, even if it is a large one. Since data collection, although extensive and involving multiple methods, was exclusively carried out using a single company's database, it is important to consider the fact that the model was constructed based on a single experience. We encourage readers to reproduce the model in other contexts and we value the importance of data collection using multiple methods.

Finally, future research suggested by this article involves the use of its proposed methodological approach to develop a persona, to further refine and adjust the model. Its application in different contexts will show which steps need adjustments and how we can advance methodologically in search of more business solutions being achieved through the synergy between academia and the market.



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