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LEARNER PERSONAS

Everything you need to build audience segments that drive better learning impact



It's time to re-define L&D

Right, let's address the elephant in the room before we even get started: **personas are not job titles**. If you're lumping 'all managers' or 'all frontline workers' into one big, generic bucket, we need to have a word (or several).

Your learners are not carbon copies of each other. They don't think the same, feel the same, or respond to learning in the same way.

And yet, L&D often insists on treating them as a one-size-fits-all monolith, throwing out content like confetti and hoping some of it sticks. **Spoiler: it doesn't.**

That's where learner personas enter the equation.

Borrowed (stolen, really 😇) from the world of marketing, personas help us understand who our learners really are – what motivates them, what makes them roll their eyes, and most importantly, what actually gets them to engage with learning. Because if we want them to do more than passively click through an elearning module with glazed-over eyes, we need to meet them where they are.

This guide is your ultimate cheat sheet for building learner personas that actually work. It's packed with practical tips, real-world examples, and a healthy dose of straight-talking advice to help you finally crack the code on learner engagement.

So, are you ready to stop shouting into the void and start creating learning experiences that actually land?

It's time to re-define L&D.
Let's do this!

- Ashley Hinchcliffe
Founder, MAAS Marketing



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TL;DR: LEARNER PERSONAS

Haven't got time to read it all? Can't blame you, we have rambled on for over 3000 words. Go straight to the section you want to consume with our super handy dandy supremo table of contents.

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WHY DO WE NEED PERSONAS?

First things first. Let's just make sure we're all speaking the same language here. This is our definition of a learner persona:

"A learner persona is a semi-fictional representation of your learners, combining market research, qualitative and quantitative feedback from employees and YES! some assumptions to provide L&D teams with an actionable audience segment designed to improve both learning design and communication approaches."

The concept of a persona is not a new one; it's been used in marketing for years to enable marketers to determine who their target audience is, what channels are going to be effective as well as highlighting key emotional drivers that really help to answer: "What's in it for me?". Answering WIIFM is the lynchpin of any successful marketing engagement and it will absolutely be the key to your success when it comes to getting better learner engagement.

Better learner engagement

We all want hyper engaged learners, don't we? Learners who constantly go out of their way to log into your learning platform and learn. Learners who just can't get enough of learning. Learners who undertake more learning than their brains have room for.

OK. That might be a bit hyperbolic, but at a minimum you really do need your employees to connect better with your learning programmes. After all, that's why you're creating learning opportunities for your people in the first place right? Because your business needs them to be better at their jobs, and you need them to learn stuff in order to improve their performance.

Changing behaviour requires a change in tactic.

That business mandate for improving performance may well work for getting L&D's butts a'movin', however it's incredibly ineffective at motivating your learners.

They literally couldn't care less about what the business wants them to do or why they want them to do it. Yeah you might be able to instigate 'learning activity' through fear, but this is very shortsighted. We'll explain later. Just because it's important to you, does NOT mean it's important to them.

Instead, your learners care about making their working lives better and easier. They care about getting more time back in their working day. They're selfish. And so they should be. For some reason though, we always see L&D constantly trying to motivate their employees to learn by using business-mandated reasons. And it just doesn't work.

If we really want to make them move, we have to capture their hearts and minds. We need to understand who they are, what they want and when they want it. Personas help us understand that and enable us to change how we interact with them as a result.



BENEFITS OF CREATING LEARNER PERSONAS.

As far as we are concerned, there are bags of benefits to developing learner personas and better segmenting your audiences. However here are our favourite three:



Helps you to improve the targeting of your audiences to make both marketing and learning more effective.



Have more meaningful discourse with your learners, helping you to build trust and better establish the learning culture you strive to establish



Better meet the needs and expectations of your learners through understanding them deeply (#heartfingers) and improving how you personalise their experience

There's other perks too. Perks like helping you deduce where you should invest time and energy. Perks like improving the efficacy of your learning. Perks that help you enhance the perceptions of your learning and positively influence sentiment around your learning brand.

Still asking yourself why you haven't built out personas yet?

Yep. Us too.

HOW TO BUILD A PERSONA.



Your learners are all different, so why are we trying to connect with them in the same ways? We've ~~stolen~~ borrowed some of the key ideas of a marketing buyer persona and adapted them so that they work for an L&D environment. So to quote almost every single piece of elearning we've encountered, let's get started.

STEP 1: DETERMINE WHO YOU ARE TARGETING

Sounds fairly obvious, doesn't it? You'd be surprised at how many conversations we've had with both L&D and business owners who just don't know diddly about their target audience. Oddly, in many cases they just don't know who they're trying to reach.

And no, the answer is not "everyone".

Targeting everyone does not work, because the reality is that even if you *are* targeting everyone, they're all different. They have nuances and triggers and feelings. I'll say it again: **they're all different**. 'Everyone' as a target audience isn't going to cut the mustard, and any efforts you undertake using this method will be quite unsuccessful.

So, take some time to define who it is that you are targeting and then jump straight into the wonderful world of data.





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STEP 2: GET USEFUL AND ACTIONABLE SEGMENTATION DATA

To really understand your audience, you’ve got to explore several key data sets to create a three-dimensional persona. Typically, vital information is captured in the following key areas:

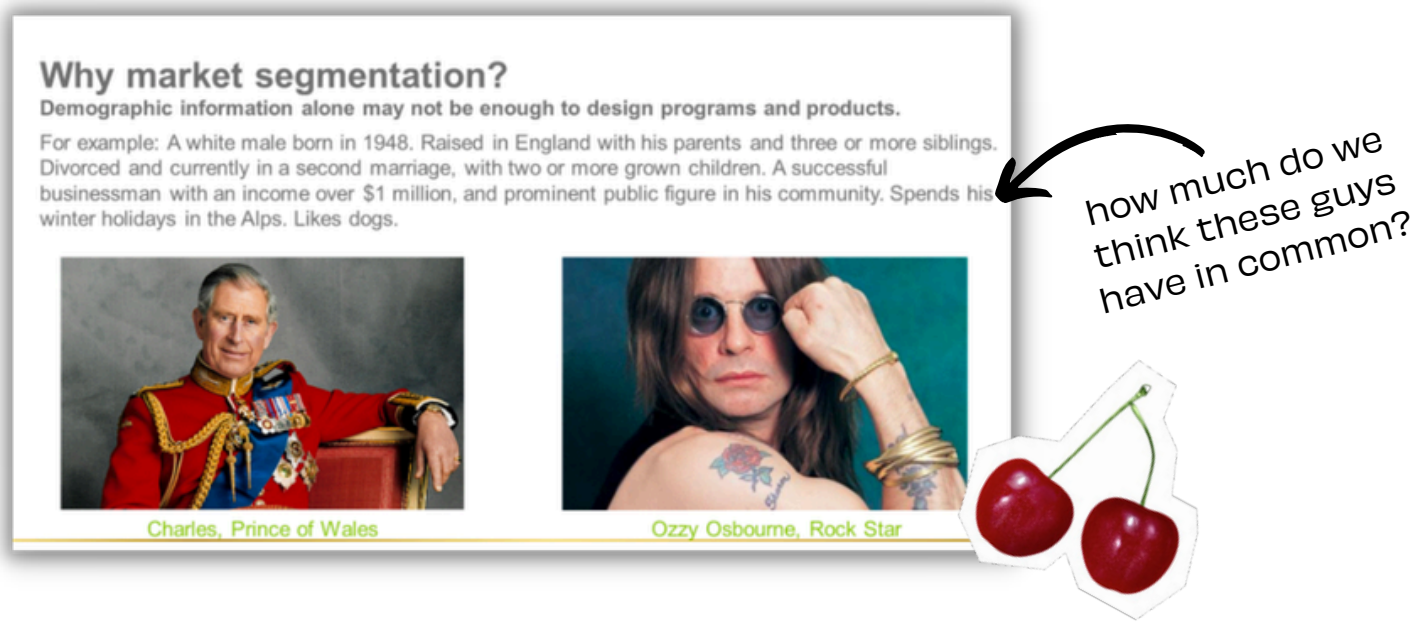
- Demographics
- Psychographics
- Behaviour

Segmentation type 1: Demographics

OK – we have a confession. Demographics give us the ick. You know, they make us feel a bit gross. They’re icky. Annnnnnyway….

Demographics are a very normalised way of segmenting audiences. But that doesn’t make them any good. And that’s because basic information about us such as age, location, marital status, job title, income etc. aren’t good indicators of someone’s challenges, wants and needs. If we think about what’s in it for me (WIIFM) and answering that, knowing how old someone is doesn’t provide any actionable information.

I'd explain it further, but I think this meme about Ozzy Osborne and Prince Charles does a fairly remarkable job of doing just that:



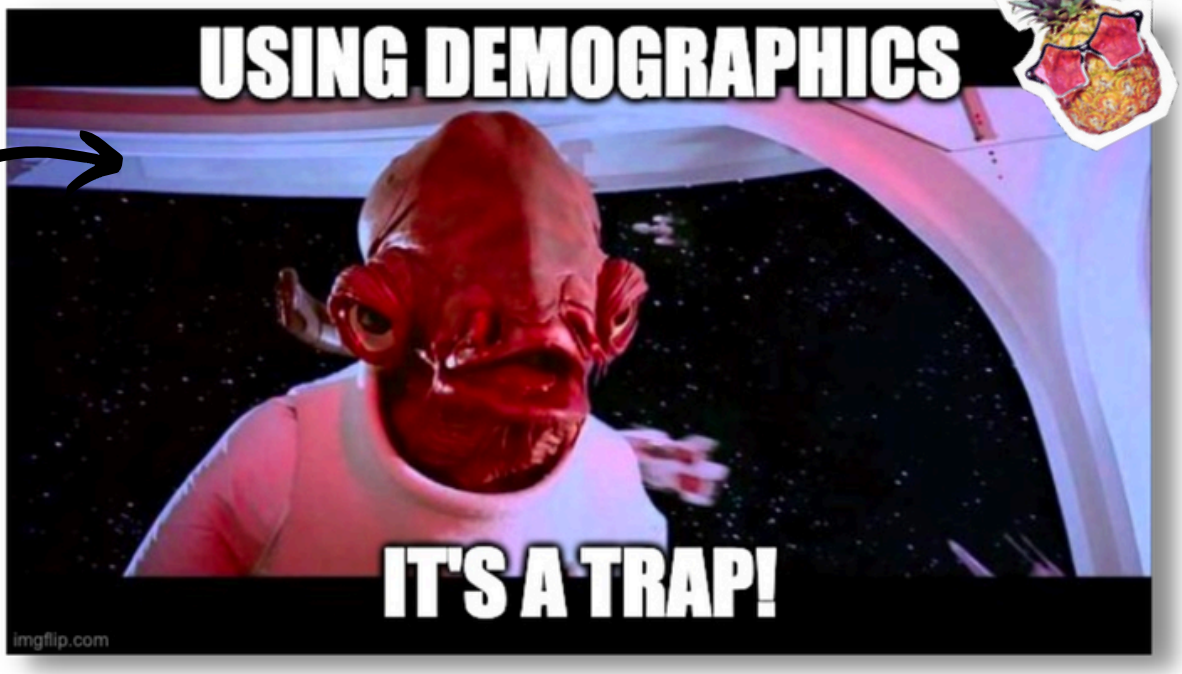
Nevertheless, demographic data tends to be one of the more common segmentation tools that we see L&D use, if they are indeed segmenting at all. In these cases, I believe most revert to this approach because they KNOW they have access to this data and it is therefore readily available. But that doesn't mean we should use it.

Now - we love to see that people are attempting to be more targeted with their communication and learning approaches. But our concern is that using just demographics does indeed segment audiences.. But the reason this doesn't work is because the messaging will still lack resonance. Basically - your efforts just won't resonate if you target people exclusively on demographic data.

My advice - steer away from demographics when segmenting.

They can be a trap, especially when looking at basic data like age or job title. Not everyone thinks the same, wants the same things or feels the same way, so for our efforts to be effective we need to dig a bit deeper and leave this pointless data firmly out of our personas efforts.

#accurate



Segmentation type 2: Psychographics

Psychographics is the study of consumers based on their activities, interests, and opinions. So in your case, your learners.

Yes. They are consumers.

Our whole digital world uses this data these days. The likes of Facebook and Instagram leverage psychographics (as well as behavioural data) to allow advertisers to target audiences with an incredible level of granularity. The result is higher conversion rates and increased marketing impact.

Psychographics extend way beyond the realms of segmenting people based on general demographic data (the data we know isn't useful). Instead, we're seeking to understand the cognitive factors that drive learner behaviours such as emotional responses and drivers, their morals and ethics and also their inherent attitudes, biases, and prejudices. Essentially, we want to understand their hearts and minds.

Psychographics are, in my opinion, much more useful for us because they help us to understand the WHY. Why would someone be motivated to learn at work? What are their beliefs around professional development? How can you best position yourself to talk to these angles?



Suddenly we're looking at audiences as people. Rather than using structured data like age or gender, which doesn't really allow us to see the human aspects of them, psychographics really help us better determine their character. Suddenly, we know how they feel and think. And suddenly, we know them a heck of a lot better.

Getting psychographic data on your learners

Yes. We know you are sat there thinking "Pfffttt. I don't have this data".

Maybe not, but that doesn't mean you can't get it. If you're really, really serious about improving the impact of your learning and the marketing communications that support it, then you MUST understand your audiences better.

Getting psychographic data isn't actually that hard; but it can take a bit of time.

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Learn more about how Elvira Ampt at Expedia Group transformed her learning approach using personas.

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Some of the key ways you could seek to get more information about your target audience are:

- **Interview learners** and ask them questions about their wants, needs, desires and more

- **Create focus groups** and ask groups of learners the same questions for consistency and comparison

- **Use online surveys/questionnaires and quizzes** – if getting your audiences to complete a whole survey is proving challenging, why not send emails with a single question in them, or embed a single question in your intranet? You're still asking the same questions, but over an extended period of time. Loads of online survey tech will let you do this such as Typeform, SurveyMonkey etc.

- **Interview learners' managers** – this sounds weird but bear with me. These people will have a very clear understanding of what is most important to your audiences. They'll know what their blockers are, can identify key drivers, and without a doubt highlight what's really grinding their gears. They might even be a persona in and of themselves. Two birds, one stone.

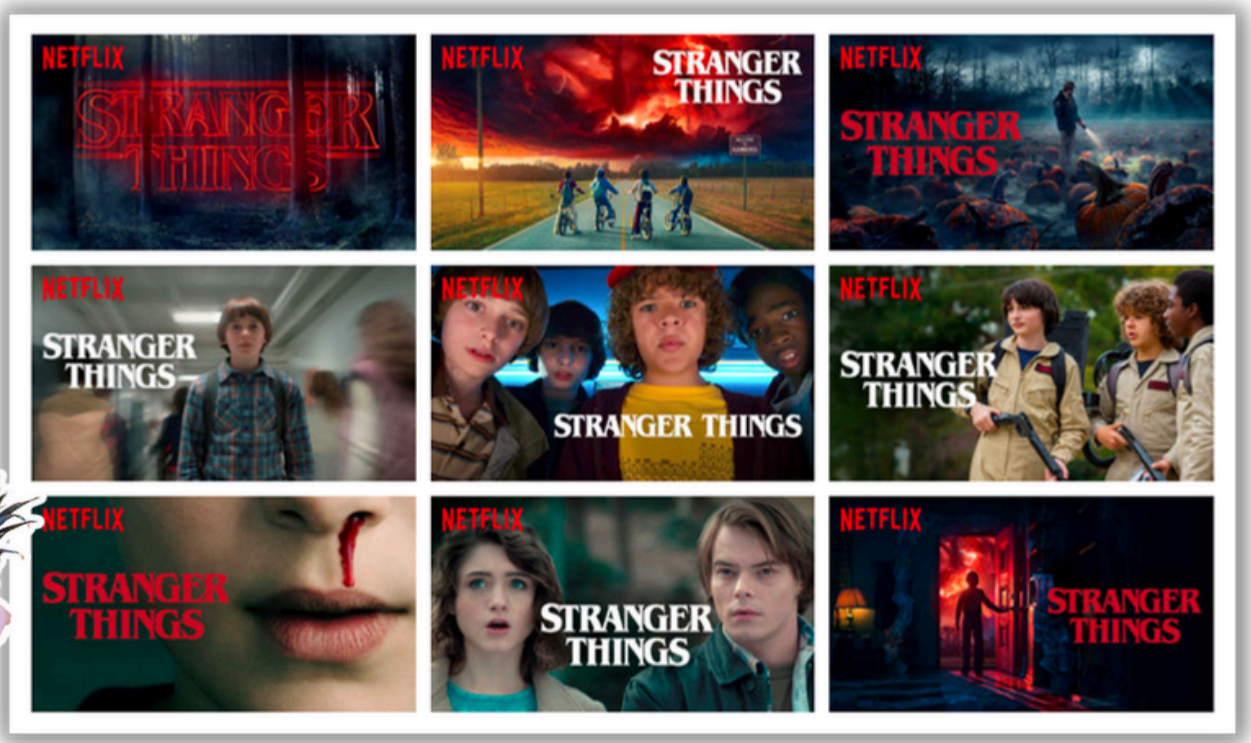
Whilst getting this data may be cumbersome and time consuming for you, the treasure trove of information that you will have to improve your targeted efforts will be worth it. I promise.

Segmentation type 3: Behaviour

What on earth are your people doing when they're learning? How about when they're not? Do they ever visit the LMS? If so, what are they up to when they get there? What times of day do they learn? What topics or content gets them interested?

You'll likely be familiar with the idea of using behavioural data to more effectively target audiences and provoke a desired response. Many brands use them in the same way as psychographics and for the same reasons; these quantitative insights get results. According to McKinsey, **businesses that leverage customer behaviour data to generate behavioural insights outperform peers by 85%** in sales growth and more than 25% in gross margin. What we're saying is, it undoubtedly works.

For example, did you know that Netflix even adjusts the covers for their movies and TV shows based on your previous viewing history? So say you watch a lot of horror and crime documentaries, the cover for something like 'Stranger Things' will be very different to someone who is watching reality TV shows and Bridgerton. Oh yeah, that blew our mindholes too.





That's not all. You'll have likely experienced re-targeting as a form of behaviour-based marketing in your online pursuits. You know, those really annoying ads that follow you around from website to website when you're browsing?

Even though it is annoying, this consistent presentation of a product you have **ALREADY** looked at continues to push you through your buying cycle, forcing you to consider the product again and again and in many cases, eventually buying it.

So whilst you can't follow your learners around the interwebs promoting your latest leadership programme (imagine!), you can still use their behaviours to target them differently. Depending on your learning platform, you may be able to get some behavioural data from it. However we strongly recommend you consider how you can also gather behavioural data outside of the LMS silo.

Using Google Analytics

Google Analytics is essential for gathering behavioural data. It is typically used by marketers to track browser behaviour on their websites, as well as understand a whole heap of other relevant information such as what device they're browsing on, what country they're in and so, so much more.

Install this on your LMS and you'll suddenly be privy to the same information. The beauty of using GA is that even if you change your learning platform down the line, you just need to add the tracking code onto your new platform and all your legacy data will remain intact (yay, I hear you all say. Probably).



ACTION POINT: Even if you have no need for behavioural data right now, install Google Analytics anyway. That's because it only works from the day you install it - better to have loads of data you'll never use than want the data and not have any, amirite?

Other behavioural data measurement tools include:

- Tracking within learning experiences (and no, we do NOT mean SCORM and completions). We mean content medium, i.e. a clear preference for videos over PDFs, content topics, i.e. a preference for tech-focused skills over soft-skills and even times of day/week that people are learning.
- Email opens/clicks
- Interaction with push notifications
- Interaction with social posts (such as Yammer, Slack etc)

Also don't forget – **sometimes a lack of behaviour is just as significant as someone doing something**. For example, if you are finding that people aren't engaging with some of your learning content, that's just as significant, if not more, than if uptake was high. This behaviour, or lack thereof, can help you better understand your target audience too.

Behavioural data, when combined with psychographic data, can provide you with a really clear picture of your target audiences and really help you to understand who they are, what they want and need and most importantly, what motivates them to move. The sooner you start seeing this data as strategic, the better.

Once you've gathered all the data you can, it's time for step three.



STEP 3: BE COMFORTABLE WITH MAKING SOME ASSUMPTIONS



Yes, we all know what they say about assumptions, and in many cases they can be dangerous. But unfortunately when it comes to people, humans and their behaviours, we just cannot know everything. Even the likes of Facebook and their limitless tap on our personal data will still have gaps in their understanding of us.

So when you are building your personas, use the data you **do** have to help you plug the gaps. It's OK to make assumptions, as long as the entire persona isn't built on assumptions alone. When there is a clear lack of information on your persona that you just can't get, use your common sense to ask yourself: *"Knowing what I know about this persona, what do I think is the most likely reaction/response?"*

Asking this single question, and validating the answers with several others in your team will help you pad out the missing data. And then you are ready!

STEP 4: BUILD YOUR LEARNER PERSONA.

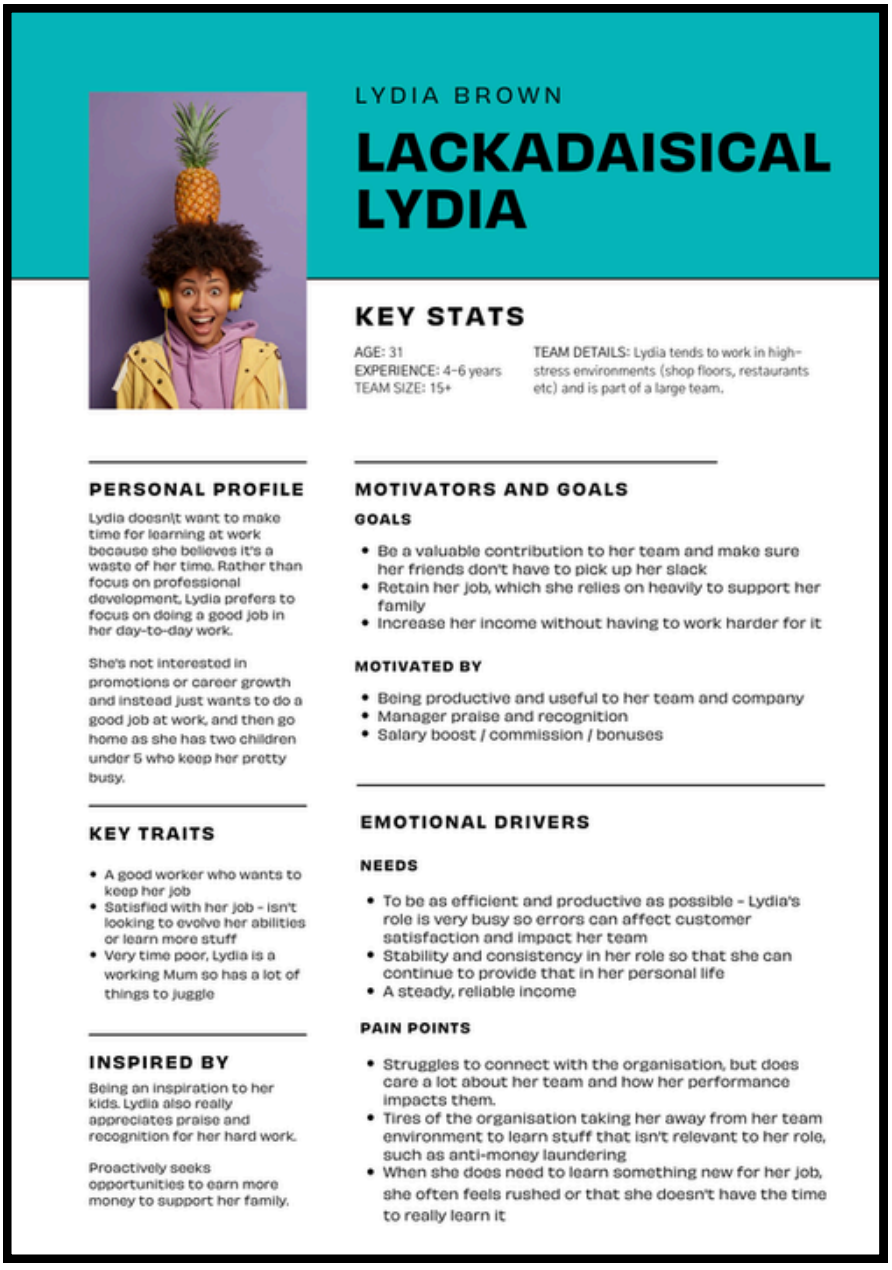
Once you have collected all your data, it's time to collate it together and create a brand spankers persona. You can design your persona however you like, but we prefer to make it look like a sort of visual CV. That's just our preference though, so go bananas and create a look and feel that's appropriate for your brand. Just make sure the layout you select allows anyone who needs to use the persona to easily interpret and understand the data.

In many cases, you may well include some demographic data within your persona (such as job title, age and gender) but these are purely used for context for users of the persona and shouldn't play a critical role in their overall character.

What we'll typically include in a persona:

- Personal profile: who are they? A broad overview of their personality can be useful
- Wants and needs
- Key professional challenges & pain points
- Personal interests

Some people like to include a picture of the persona and maybe even give them a name. Do whatever you need to in order to make this persona feel alive and real in your mind. You'll be holding this persona in your mind's eye A LOT, so make sure you totally understand who they are and how each of them is unique.



LYDIA BROWN

LACKADAISICAL LYDIA

KEY STATS

AGE: 31
EXPERIENCE: 4-6 years
TEAM SIZE: 15+

TEAM DETAILS: Lydia tends to work in high-stress environments (shop floors, restaurants etc) and is part of a large team.

PERSONAL PROFILE

Lydia doesn\t want to make time for learning at work because she believes it's a waste of her time. Rather than focus on professional development, Lydia prefers to focus on doing a good job in her day-to-day work.

She's not interested in promotions or career growth and instead just wants to do a good job at work, and then go home as she has two children under 5 who keep her pretty busy.

KEY TRAITS

- A good worker who wants to keep her job
- Satisfied with her job - isn't looking to evolve her abilities or learn more stuff
- Very time poor, Lydia is a working Mum so has a lot of things to juggle

INSPIRED BY

Being an inspiration to her kids. Lydia also really appreciates praise and recognition for her hard work.

Proactively seeks opportunities to earn more money to support her family.

MOTIVATORS AND GOALS

GOALS

- Be a valuable contribution to her team and make sure her friends don't have to pick up her slack
- Retain her job, which she relies on heavily to support her family
- Increase her income without having to work harder for it

MOTIVATED BY

- Being productive and useful to her team and company
- Manager praise and recognition
- Salary boost / commission / bonuses

EMOTIONAL DRIVERS

NEEDS

- To be as efficient and productive as possible - Lydia's role is very busy so errors can affect customer satisfaction and impact her team
- Stability and consistency in her role so that she can continue to provide that in her personal life
- A steady, reliable income

PAIN POINTS

- Struggles to connect with the organisation, but does care a lot about her team and how her performance impacts them.
- Tires of the organisation taking her away from her team environment to learn stuff that isn't relevant to her role, such as anti-money laundering
- When she does need to learn something new for her job, she often feels rushed or that she doesn't have the time to really learn it

Here's a rough, fake persona that we have created to give you an idea of what yours could look like.

Take note of the fact that not only have we considered Lydia's key motivators and goals at work, we've also explored her needs and crucially, her pain points.

Your personas certainly don't have to look like this, so get creative and bring them to life in your own way!

STEP 5: TEST, TEST, TEST (AND NEVER, EVER STOP)



Here's where the real fun begins - putting your persona into practice. Before you start using your persona, manage your own expectations and be real about what you've created. Chances are, you haven't gotten it all right on the first go (kudos if you have, you little one take wonder you).

So, rather than just releasing your persona out into the wild and thinking you never have to worry about it again, consider what steps you can take to stress test your persona. How can you really see whether it's accurate and working as well as it should?

Make sure you are doing everything you can to get data on your persona's performance, so that you can carry on with step 6.

Not clear what we mean by testing your persona? Here's a simple example using a basic A/B test in an email:

Let's say you are using some psychographic data that you have. You believe one of the main drivers for your persona is the fact that they are impatient, so you want to test this out.

You create two emails, each with the same internal contents but a different subject line:

A. FOCUS ON URGENCY = Subject line 1: Get the new skills you need NOW Peter!

B. FOCUS ON TAKING YOUR TIME = Subject line 2: Give yourself the time you need to succeed Peter!

You monitor the open rate of each of the two emails because the outcome of the test will help you understand your persona better.

Now, this is a simple test and you shouldn't say to yourself "OK, subject line one got way more opens. That means my persona absolutely is impatient." Instead seek to gather a body of information and draw conclusions from that; one email, one data point, does not signify much.

So get as much data as you can in your testing and then move on to step 6.

STEP 6: ITERATE AND EVOLVE OVER TIME

Once you have some data on how your persona is performing, you can then adjust and evolve it over time. Use information from your learning and communication efforts to help you realign your persona and include new attributes as they become relevant.

Remember: a persona is a living, breathing thing that you should tend to regularly. It's not a 'one and done' situation. Keep it thriving and alive by feeding it new information that you have gathered based on your audiences behaviour. And never, ever stop.

Re-define your learning function

The beauty of creating a robust, visceral learner persona is that it can be used in a variety of applications in L&D. After all, it's ultimately helping you understand your audiences better, so whilst we are suggesting using it to help you improve your marketing for learning® efforts, why not use it to help inform your learning programmes and the learning experiences you are developing too?

One persona. Dozens of applications. Sounds like a task worth completing, doesn't it?



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