BEHAVIORAL ARCHETYPES

a smashing ideas toolkit
WHO WE ARE  Innovation Catalysts for the Fortune 100

By definition, we’re a modern digital product, service, and digital innovation partner. In practice, it means that we work with Fortune 100 clients across each stage of the innovation process to generate breakthrough ideas. We plan, design, and deliver digital products and services and lead teams to unearth new opportunities that offer undisputed distinction in a crowded market.

WHAT WE DO  End-to-End Product, Service & Experience Design

Does it have a screen? Can we talk to it? Is it generating tons of data? Is it something really hard to figure out, or in a technically complex space, or just needs to be amazing? If you’ve answered yes to any of these, you’ve found the right people. We help companies crack big business and design problems in digital, and teach them modern ways of working in the process.

We offer strategy, research, user experience design, visual design, and development services, which means we can take you from initial research to full product realization without any breaks in continuity.
A person’s behavior can be vastly different depending upon the context or circumstances. As a lens, behavioral archetypes allow you to focus on more nuanced scenarios and identify the user’s specific behavior in a given context.

We’ve designed this collaborative toolkit to help you and your team build behavioral archetypes based on the market profiles of your target audience.

In this toolkit, we step you through the process of identifying key scenarios and mindsets for your target segments, empowering you and your team to align on the underlying factors that drive user behavior.

Once you’ve defined relevant contextual scenarios and mindsets that influence the behavior of your target audience, you’ll have the basis for behavioral archetypes.

This toolkit will help you evaluate behavioral commonalities and differences amongst your target audience, and in conjunction with metrics from your market data, help you determine which solutions or features to focus on and identify which assumptions you need to validate through user research.
**Market Profile**
Depicts the “who” of your audience, describing the similarities of customers within a market segment, and (if you have more than one) highlighting differences among customers in different market segments.

**Behavioral Archetype**
Conveys the “who does what, when they do it, and why” of your audience. Steeped in user behavior, they focus on a group’s goals, needs, and pain-points and capture how they think, feel and act in particular scenarios.

**Proto-archetype**
An assumptive behavioral construct of a market profile that is built upon assumptions — what we like to call “informed intuition” — that serves as a starting point but still needs to be validated with user research.

**Demographics**
Assumes that people with similar characteristics will exhibit similar patterns or motivations and that those characteristics will translate into similar preferences.

**Geographics**
Divides markets according to geographic criteria of various scales, such as continent, country, region, population density, size, or climatic zone.

**Psychographics**
Considers how and with whom people spend their time, and which internal and external factors they are most responsive to and influenced by.

**Goal**
What the user is primarily motivated to obtain or achieve in a particular context.

**Need**
Parameters the user needs to be satisfied in order to achieve their goal in a particular context.

**Pain-point**
Conditions that cause the user annoyance, disrupts their experience, or triggers abandonment of an experience within a particular context.
**Market Profile**
Depicts the "who" of your audience, describing the similarities of potential customers within a market segment, and (if you have more than one) highlighting the differences among customers in different market segments.

**Behavioral Archetype**
Conveys the "who does what, when they do it, & why" of your audience. Steeped in user behavior, they focus on a group’s needs, motivations and pain-points, and capture how they think, feel and act in particular situations or scenarios.

**Business value**
Helpful for visualizing customer segments, so project teams can relate to those segments and build solutions for them. Helps the team avoid designing a product from a client-as-customer or us-as-customer perspective.

**Insight focus**
Useful for insight into the general behavioral characteristics and attitudes of a target audience, but often don’t include details on behavioral patterns or potential actions.

**Core aspects**
- **Key Metrics**: (segment size / growth rate, percentage of overall market)
- **Demographics**: (age, gender, ethnicity/race, family status, occupation, income level)
- **Geographics**: (local/regional/national/global and seasonal/environmental specifics)
- **Psychographics**: (values, personality, lifestyle, interests, attitudes, affinities)
- **Behavioral**: (needs, patterns, usage rates, aversions, price sensitivity, brand affinity)
- **Fictitious name**

**Optional elements**
- Representative photograph
- Quote(s)

**SELECTED METRICS**
- **Goals**
- **Thoughts**
- **Needs**
- **Feelings**
- **Pain-points**
- **Actions**

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WHAT TO EXPECT

In this toolkit you will find a series of activities* to help your team build behavioral archetypes and determine a course of action:

01 IDENTIFY AND CLEARLY STATE THE PROBLEM
02 UNDERSTAND YOUR TARGET AUDIENCE
03 IDENTIFY CONTEXTUAL USER SCENARIOS AND MINDSETS
04 BUILD YOUR BEHAVIORAL ARCHETYPE(S)
05 PRIORITIZE AND FOCUS
06 DOCUMENT DATA SOURCES
07 DETERMINE NEXT STEPS

* Depending on the amount of data you have on your target audience, these activities may need to be spread out, interspersed with additional research activities to inform the exercises.
You’ve probably been tasked with helping your organization or client solve a problem that they are having with their product or service. Let’s define what that problem is so that you have a clear lens to look through.

**PROBLEM STATEMENT**

Example: We continually hear that users can’t find the right job easily on our website/app.
STAGE 02
UNDERSTAND YOUR TARGET AUDIENCE

You may have segmentation data or personas from Marketing, or you may have talked to stakeholders about which users to focus on.

If you don’t already have market profiles, the subsequent template offers a starting point. Be as detailed as you like, based on what’s relevant for your project, and feel free to add anything we didn’t cover in this toolkit.

We also recommend you mark any assumptive datapoints with an asterisk (*) that should be followed up on with research.

Stuck?
Here are some things to try:

Talk to your marketing department, customer service team, or sales team.

Talk to customers that your internal teams have suggested are typical.

Look at the competition. Who are they targeting?
MARKET PROFILE
EXAMPLE

Demographics
Age 29
Gender Female
Ethnicity/race African American
Job Title Sales rep for a pharmaceutical company
Employment status currently employed full-time
Family status Single
Education level Bachelor of Science, U of Washington
Other demographic data technically proficient, dog owner, wears corrective lenses

Geographics
local/regional/national/international specifics
urban - Seattle, WA
seasonal/environmental specifics rains 9 months of the year

Psychographics
Personality extrovert
Attitudes finds the positive in most situations
Affinities connects with people easily
Values ethical, loyal to her co-workers
Interests travel, skiing
Lifestyle works too much*

Behavioral
General needs needs to feel like she’s part of a team
Patterns tends to stay in a job for 5+ years
Usage rates visits LinkedIn weekly to stay connected
Price sensitivity NA
Brand preferences unknown*
Other behavioral data NA

Fictional first name Susan
Market segment millennial job seeker
Segment key metric(s) 40% of market, 4.6MM

Mark assumptions to be validated during user research with an asterisk (*).
MARKET PROFILE

Fictional first name _______________________
Market segment _______________________
Segment key metric(s) _______________________

Demographics
Age ______________________________________
Gender ____________________________________
Ethnicity/race ______________________________
Job Title __________________________________
Employment status __________________________
Family status _______________________________
Education level _____________________________
Other demographic data ______________________

Psychographics
Personality __________________________________
Attitudes ___________________________________
Affinities ___________________________________
Values ______________________________________
Interests ___________________________________
Lifestyle _____________________________________

Geographics
local/regional/national/international specifics_________
seasonal/environmental specifics ______________________

Behavioral
General needs _________________________________
Patterns ______________________________________
Usage rates ____________________________________
Price sensitivity ________________________________
Brand preferences ______________________________
Other behavioral data ____________________________

Mark assumptions to be validated during user research with an asterisk (*).
STAGE 03
IDENTIFY CONTEXTUAL USER SCENARIOS AND MINDSETS

KEY QUESTION: How do situational factors like environment, people, or time impact the needs and motivations of your target user?

In this activity, you will identify one or more key contextual scenarios, relevant to the problem you identified in Stage 01, when your market profile will engage with your product or service.

After you have written a scenario, describe your market profile’s thoughts, feelings, and actions relative to this context. To get a headstart on your customer empathy efforts, try describing these using first-person statements.

This data will highlight the user’s motivations and underlying emotions to help predict how they will behave in a given situation. Repeat this activity until you have identified the most likely scenarios for every profile you have noted.

And as with the market profiles activity, mark any assumptive datapoints with an asterisk (*) that should be followed up on with research.
**Scenario Example**

**NARRATIVE**

Susan has just been laid off from her job and is uncertain how long her savings will last. She has been doing a small amount of networking, but doesn’t have any strong leads.

Her unexpected unemployment has also left her with a resume and a LinkedIn profile in need of updating.

**THOUGHTS**

I should have kept examples of my work on a regular basis.*

My current networking efforts aren’t adequate.

Need to re-assess my finances and cashflow this month.

**FEELINGS**

Mad about being laid off after four years of loyal service.

A little panicked about my lack of emergency savings*.

Regretting buying that new car.

**ACTIONS**

Check my savings to see if things are as dire as they feel.

Update my resume and online job profile.*

Set up coffee meetings with 3 colleagues for advice/leads.

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Mark assumptions to be validated during user research with an asterisk (*).
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**STAGE 04**

**BUILD YOUR BEHAVIORAL ARCHETYPE(S)**

**KEY QUESTION:** How will your target user behave in a given scenario, and what are the factors that influence their behavior?

So now that you know who your user is and what type of scenario(s) they’re likely to encounter when they engage with your product or service, we can start the process of determining your user’s goals, needs, pain-points, thoughts, feelings, and actions in context of those scenarios.

Key data from the market profiles can also become more relevant when viewed through the lens of a scenario. For instance, your user having a dog may be irrelevant until we view it through the scenario of her dog having separation anxiety and she needs to bring it to work. Thus, she will be more likely to use a service that allows her to search for pet-friendly companies.

And asterisks (*). Because research.

**Stuck?**

**Here are some things to try:**

**Review your market profiles with a different mindset**

Characteristics from the market profile can also be extracted or inferred into the behavioral archetype. In our example, we know that Susan is in pharmaceutical sales. That profession would typically have a more extroverted type of personality, would be more prone to in-person networking, and more of a self-promoter. These assumptions should have been verified during user interviews and can now be pulled into the behavioral archetype you are getting ready to complete.

**Make an assumption and validate it**

It’s OK to guess based upon your previous research and your intuition. We recommend following these assumptions up with user research or to review your assumptions with your stakeholders (sales and customer/tech service) to see if they are accurate.
## BEHAVIORAL ARCHETYPAL EXAMPLE

**NARRATIVE**

This person is driven to find a job quickly due to a variety of pressures, such as maintaining a steady income, staying relevant in their field, ego, and balance of household power.

The bulk of their time is spent on this effort, but they need tools to help them streamline.

They tend to get frustrated with people and experiences that lead them on wild goose chases and waste their time.

They don't want to settle for just any new job, but the pressures of unemployment may prevent them from holding out for the ideal career fit in favor of something that will help them "just pay the bills".

**GOALS**

- Find a (meaningful) job as soon as possible.
- Increase earnings by at least 10% so I can start saving for retirement.
- Do something with my degree besides sales.

**NEEDS**

- A better long-term financial situation.
- A dog-friendly workplace that's close to home and accessible by mass transit.
- A job with better work/life balance.

**PAIN-POINTS**

- Job search sites are such a time-waster.
- Everyone has a different application process.
- OMG, all this tiny type is impossible to read!
  It's like stuff just goes into some black hole.

**THOUGHTS**

- I should have kept examples of my work.*
- Why are recruiters so unresponsive?
- Need to re-assess my finances & cashflow.
- What will my friends & colleagues think?

**FEELINGS**

- Mad about being laid off after four years.
- A little panicked about my lack of savings.*
- Regretting buying that new car.
- Anxious, afraid, but also hopeful & optimistic.

**ACTIONS**

- Checks finances every morning.
- Updates resume and online job profile.*
- Sets up coffee meetings with 3 colleagues.
- Attends free local networking events.*
Mark assumptions to be validated during user research with an asterisk (*).
**STAGE 05**  
PRIORITIZE AND FOCUS

**KEY QUESTION:** Which archetype(s) should you focus on?

At this point you may have too many behavioral archetypes for you to reasonably focus on. If you had 3 primary market profiles and 3-4 scenarios for each, you may theoretically end up with 12 behavioral archetypes.

More than likely you will need to narrow your archetypes to your primary and secondary, and maybe tertiary. This is a good time to have your stakeholders weigh in on where the focus should be.

**Merge-purge.** There’s a strong possibility that some of your archetypes will be so similar that keeping them distinct will add no incremental value to your project team or stakeholders. Consider merging those into a single archetype and including a “variants” section to capture any datapoints that are unique.

**Do a prioritization exercise.** There are several ways you can do this, but we recommend a simple method where you hand each of your stakeholders 3 star-stickers (dot-stickers or post-its will also suffice). Ask them to place their stickers on the archetype(s) that they think are the most relevant to the business problem you have noted in Stage 01. They can place all of their stickers on a single archetype, or spread them out across 3 different archetypes. After all stakeholders have voted, tally the votes, and see which archetype(s) come out on top.
KEY QUESTION: What research did you do to validate your assumptions?

It’s important to document your research sources, as it will help you recall what you did when you revisit the artifact(s) weeks or months down the road. It can also help to ramp up new team members and provide defensible traceability for design and engineering decisions.

Take a moment to jot down any sources you used in the course of this exercise on the following page. If you need more room, feel free to document it digitally and add a printout to this packet.
RESEARCH & DATA SOURCES

- MARKET DATA
- USER INTERVIEWS
- ONLINE RESEARCH
- STAKEHOLDER INTERVIEWS
- OTHER
Armed with this new information, take a shot at answering these questions:

**Do you know enough about your user to inform design and engineering?**

**Any gaps or significant assumptions in your behavioral archetypes?**
If so, research to address gaps in knowledge (stakeholder interviews, user interviews, surveys, focus groups, etc.)

**What are the common points shared across behavioral archetypes?**
Refer to market metrics to determine what percentage of your customer segments resonate with these common points.
Actions you can take: experience mapping activity, prioritize features for MVP

**What are some key differences amongst the behavioral archetypes?**
What new opportunities do these differences reveal, including new products or services?
Actions you can take: roadmap project, concept generation
THANKS FOR TRYING OUT OUR TOOLKIT

We had a blast putting it together and hope you found it useful.