

BEHAVIORAL ARCHETYPES

a **smashing ideas** toolkit

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Smashing Ideas
2211 Elliot Ave, Suite 110
Seattle WA 98121 USA
+1 206 378 0100

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when they are shared and discussed!

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WHO WE ARE Innovation Catalysts for the Fortune 100

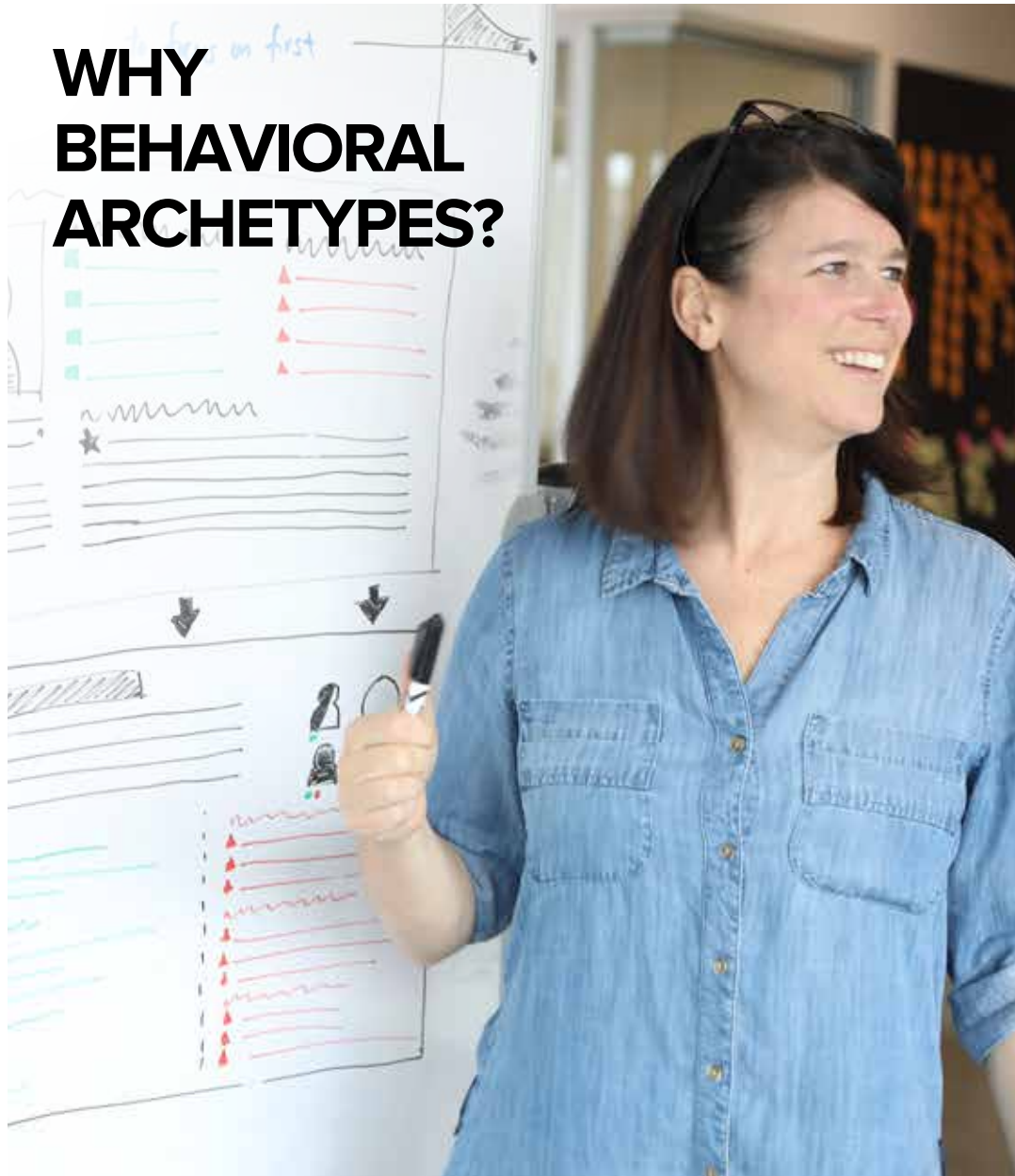
By definition, we're a modern digital product, service, and digital innovation partner. In practice, it means that we work with Fortune 100 clients across each stage of the innovation process to generate breakthrough ideas. We plan, design, and deliver digital products and services and lead teams to 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.

WHY BEHAVIORAL ARCHETYPES?



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.

LET'S ALIGN ON LANGUAGE

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.

BETTER TOGETHER



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.

Most directly help determine the approach and functionality of a user experience, as well as contributing to determining, validating, and prioritizing product features.

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.

They provide insight into behavior patterns (how a customer uses a product or service), and potential actions (how a customer might behave in a particular situation/scenario).

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

Scenario-specific goals
Scenario-specific needs
Scenario-specific pain-points
Thoughts (informed by user research and empathy mapping activity)
Feelings (informed by user research and empathy mapping activity)
Actions (informed by user research and empathy mapping activity)
Nickname

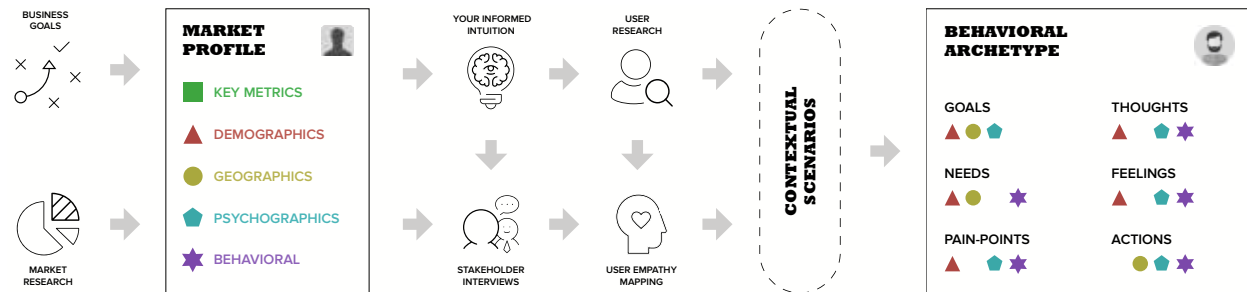
Optional elements

Representative photograph
 Quote(s)

Illustrated avatar
 Quote(s)

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.

STAGE 01

IDENTIFY AND
CLEARLY STATE
THE PROBLEM

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.

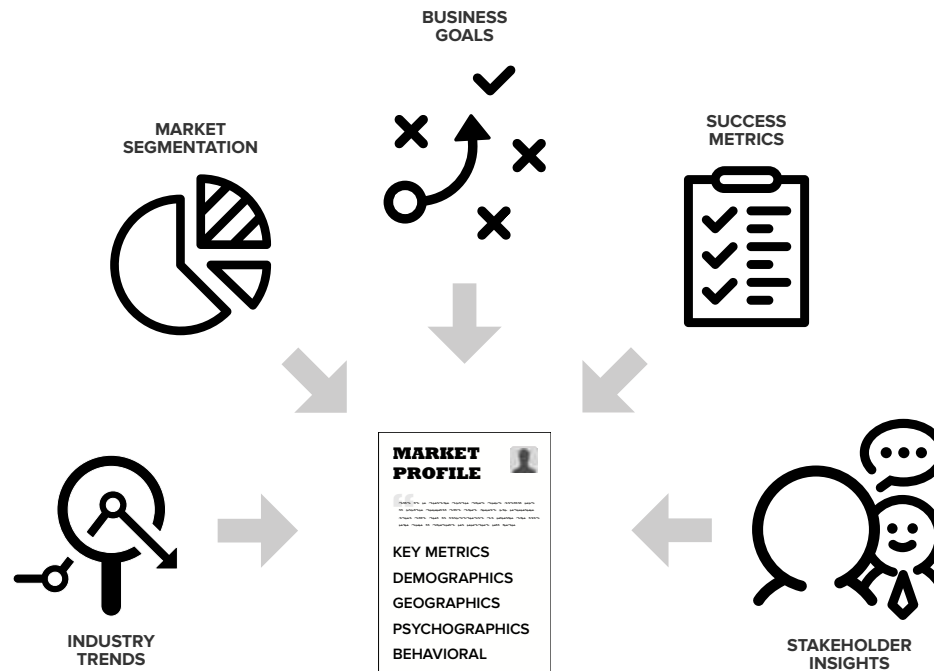
Stuck?

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

Fictional first name Susan

Market segment Millennial job seeker

Segment key metric(s) 40% of market, 4.6MM

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

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 _____

Geographics

local/regional/national/international specifics _____

seasonal/environmental specifics _____

Psychographics

Personality _____

Attitudes _____

Affinities _____

Values _____

Interests _____

Lifestyle _____

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

Stuck?

Here are some things to try:

If you have little or nothing to go on from research insights or stakeholders, you may need to do some additional research to understand what the typical scenarios are that your user may encounter.

Reach out to your sales team since they are often a great resource. They are on the front lines and talk to customers on a daily basis.

Engage with your customer service department. Often listening in on their phone calls will give you a sense of common scenarios. Also ask them if they have a summary of the calls that come in or the complaints sent in from customers. This can be a rich source of information to pour through and find patterns.

Talk to the users that are representative of the profiles that have been identified.

Do an Empathy Mapping session to help uncover what users are Thinking, Feeling or Doing in relation to your product or service. The workshop is detailed here: <https://www.cooper.com/journal/2014/05/persona-empathy-mapping>

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

Market profile Susan, millennial job seeker

Scenario descriptor Laid off

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.

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

SCENARIO

Market profile _____

Scenario descriptor _____

NARRATIVE _____

THOUGHTS _____

FEELINGS _____

ACTIONS _____

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



STAGE 04

BUILD YOUR BEHAVIORAL ARCHETYPE(S)

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.

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.

BEHAVIORAL ARCHETYPE

EXAMPLE

NICKNAME

Desperately-Seeking Susan

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.*

BEHAVIORAL ARCHETYPE

NICKNAME _____

NARRATIVE _____

GOALS _____

THOUGHTS _____

NEEDS _____

FEELINGS _____

PAIN-POINTS _____

ACTIONS _____

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.

STAGE 06

DOCUMENT YOUR DATA SOURCES

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.

STAKEHOLDER INTERVIEWS EXAMPLE

Tony Stark, CTO – phone interview, Thu Jul 20

Natasha Romanova, Founder & CEO – meeting, Mon Jul 24

Bruce Banner, Chief Data Scientist – phone interview, Mon Jul 24

Carol Danvers, Senior Recruiting Manager – meeting, Wed Jul 26

RESEARCH & DATA SOURCES

MARKET DATA

USER INTERVIEWS

ONLINE RESEARCH

STAKEHOLDER INTERVIEWS

OTHER



WHAT NEXT?

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.

