

SALSIFY

PERSONAS

v1.3 January 2016

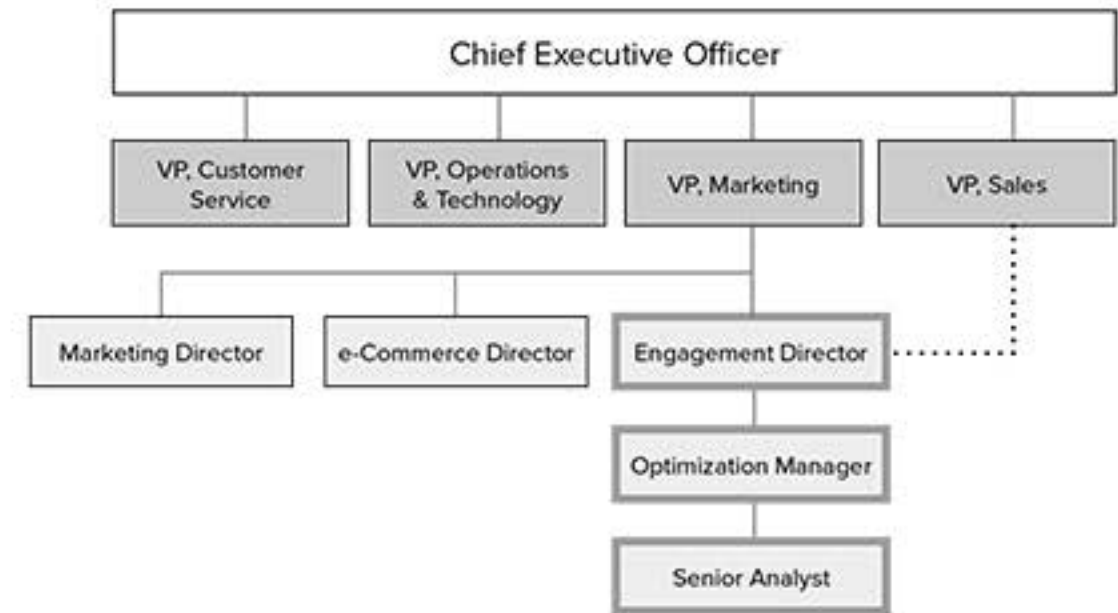
Salsify Personas At-a-Glance



Ed, Sheila, and Maria are all on the same team at Southeast Performance Auto, a seller of premium after-market auto parts and accessories.



Southeast's Organizational Chart



The team manages Southeast's product content and recently started using the Salsify app as part of new initiative to increase online sales.

Each has unique needs and different backgrounds, but common to all are these driving business goals:

- Increase SE's footprint in the consumer and pro auto after-market marketplace.
- Fuel continued growth in online sales and product assortments offered through various resellers.
- Meet or exceed the company's quarterly revenue targets and expectations.



Maria Anders
Senior Marketing Analyst

Main User Type

Quick Take on Maria

Studied Biology before switching to study Business with a concentration in Marketing. A positive outlook and keen problem solving intellect makes challenges a breeze for Maria. She has an eye-for-detail, a curious and analytical mind, and a rock-solid work ethic. She's always mindful to look for ways to save time and effort.

Computer Type / Skill Level

Laptop with external display/Advanced

High-level Goal

Making sure she's maintaining and delivering accurate and approved product information to all channels that need it.

"It's a challenge dealing with online because it changes so quickly...We're always dealing with the unknown. But being on the ground floor of something new is very exciting — It's all about creating a compelling online story [for our products]."



Sheila O'Malley
Sales Optimization Manager

Main User Type

Quick Take on Sheila

Ambitiously skipped college and has risen through the ranks to her current managerial role. A self-reliant, acute problem solver, and self-described "...people person who knows how to work a room, and get the job done."

Computer Type / Skill

Laptop with external display/Intermediate

High-level Goal

Enable and facilitate team efficiency through enhanced communication, collaboration and process, and be perceived as authoritative, innovative, and forward-thinking.

"Anything that makes for a more fluid experience, where content doesn't need to touch so many hands, or cross so many desks really makes my day."



Ed Dupont
Engagement Director

Secondary User Type

Quick Take on Ed

Wharton school MBA was a highly-paid tech consultant during the dot boom but took a job after getting married and starting a family. A self-motivated self-starter, confident and precise in thought, actions, and delivery.

Computer Type / Skill

Laptop with external display, tablet / Expert

High-level Goal

Ensuring the right people, processes, and tools are in place and that he is effectively enabling the company to meet or beat its product content deadlines and online revenue targets.

"We want to find the biggest impact on things that help the business, and take it forward in ways that increases efficiency, reduce costs, and increases sales."

Introduction to Personas

Personas are crisp, representative archetypes of target users based on data gathered by interviewing and observing real customers. They enable goal-directed product design and development by putting a memorable “human face” on our target users. And while personas are depicted as individuals, they’re in fact the synthesis of many people.

Personas help teams unify around a specific somebody, rather than a generic everybody. They get at the how and why people really use the app, what their business objectives and goals are, and help us gain unique insights into their thought processes, behaviors, skills, and temperaments.

Used effectively, personas create a shared understanding of the real people who actually buy and use the product, help us shed our own personal beliefs or biases, and help align decision-making based on customers’ true motivations, goals, wants, and needs.

Salsify Users ...

- **Come From Diverse Backgrounds.**

- **Typically Have These Titles:**

- **Have Familiarity With These Apps and Systems:**

- **Arrived at Salsify**

Why Personas

- **To gain insight into what truly motivates and drives users.** They help us empathize with the user’s mindset, and gain insight into the many roles that influence app usage, buying, adoption, and the eventual success — *or failure* — of Salsify within a client organization.
- **To help us decide what the product should do for specific people/groups.** Personas help focus decision-making on what customers need and want as a counter-balance to relying on our own personal experiences, behaviors, biases, and beliefs.
- **To help focus the user experience on users.** A deeper understanding of our users enables us to help them achieve their goals, and complete everyday tasks efficiently, effectively.

More Resources

The Origin of Personas -

http://www.cooper.com/journal/2003/08/the_origin_of_personas

Personas: What They Are and How They Work

<http://www.smashingmagazine.com/2014/08/a-closer-look-at-personas-part-1/#what-is-a-persona>

Are Personas Still Relevant to UX Strategy?

<http://www.uxmatters.com/mt/archives/2013/01/are-personas-still-relevant-to-ux-strategy.php>

“We want to find the biggest impact on things that help the business, and take it forward in ways that increases efficiency, reduces costs, and increases on-line sales.”



Ed Dupont
42, e-Commerce
Engagement Director

Quick Take on Ed

Wharton school MBA was a highly-paid tech wonk during the dot boom but took a job after getting married and starting a family. Self-motivated self-starter, confident and precise in thought, actions, and delivery.

Role - Director | Manager | Employee

Computer Type/ Skill Level

Laptop with external monitor, tablet / Expert

Major Pain Point

“Trying to find the true source of a product’s disposition in a product life cycle is extremely difficult if not impossible; Knowing what products are in the market, about to retire, are domestic but not internationally available, what’s in what store in what state. That’s a frustration I no longer need.”

Some of Ed’s Key Goals

- **Hitting or exceeding the sales forecast and revenue goals.** Ed was wooed out of his haughty consultant lifestyle for his expertise in all things online — at the time only about 20 percent of Southeast’s products were available online. With competition hot at their heels and tougher retailer demands for product content everyday, the company is looking for Ed to shepherd them through the storm.
- **Make sure the ship runs smoothly and solve big problems.** Whether it’s through technology or otherwise, Ed’s passionate about looking for ways to automate and improve on what’s already been done. He’s happiest when he’s allowed to forge a path, integrate a new system, or push-the-envelope in his quest to find new and better ways to do things and remedy old, nagging problems.
- **Knowing exactly where his customers and products stand.** Accountability is always top of mind for Ed, and thus getting the current take on where his customers head’s are at — In this case the many pro and consumer retailers like Home Depot and Walmart, that Southeast supplies — with specific products and categories. What state is their inventory in? Do they have the correct and fullest assortment of products SE offers? Getting answers to these types of questions quickly is what Ed needs most.
- **Be able to report up more easily.** With a bit of side work and being a hacker at heart, Ed’s been able to pull the numbers he needs out of Salsify to help support his cause for executive purposes. Still, he wishes there was an easier way to gauge his team’s status, progress, and results at a high-level.

Actions

- Creation and management of all users of the app (including permissions modeling)
- Determine the data model for which product content should be collected and organized for greatest efficiency and intuitiveness
- Source and build integrations that optimize the tool set, and create work flows and processes that support sales strategy
- Find methods to report out on status and progress, towards alignment and the company’s goals

A Day in the Life

Ed cares deeply about how the work gets done, but his time is precious so he doesn’t roll up his sleeves nearly as much now as he did back in the day. In order to be effective and keep focused on leadership, he prefers being strategic over tactical or operational these days, and is comfortable taking queues from his top manager, Sheila, who’s always on top of it.

Staying at a high-level wasn’t always the norm for Ed. He was once a “One Man Army” who on any given day was doing the manual work, custom coding, configuring messy integrations, and working within the boundaries of ad-hoc process, and sometimes, dysfunctional cultural norms. His mantra became optimization + quality = sales. He found Salsify, took on its initial setup, pulled in Sheilah as an analyst, and together they shepherded company-wide adoption of the app.

Still, Ed’s in the Salsify app regularly, and he’s careful to stay engaged so he can respond and react effectively when it’s required. Ed’s a bona fide technical wizard, but some things in the app still leave him guessing. Like knowing with precision where a product stands for publication, or ascertaining the relationships between products isn’t always intuitive, he says. If he can’t report out the numbers, how else can he remain accountable, demonstrate results, and drive the business forward to support sales strategy and revenue success? Ed says.

On a good day, Ed’s found solutions that work towards solving the business’ toughest problems through technology – Still his biggest passion. “It’s the primary reason I come to work,” he says.

Real People on Which Ed is based:

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“It’s a challenge dealing with online because it changes so quickly...we’re always dealing with the unknown. But being on the ground floor of something new is very exciting — It’s all about creating a compelling online story [for our products].”



Maria Anders
28, Senior Marketing Analyst

Quick take on Maria

Studied Biology before switching to study Business with a concentration in Marketing. A positive outlook and keen problem solving intellect makes challenges a breeze for Maria. She has a eye-for-detail, a curious analytical mind, and a rock-solid work ethic. She’s always mindful to look for ways to save time and effort.

Role - *Director* | *Manager* | **Employee**

Computer Type / Skill Level

Laptop w/external monitor / Advanced

Major Pain Point

“I really need to be able to quickly see what customers are set up with specific products, and see what’s ready to go or waiting for approval, where the gaps are, and what’s missing. Right now that’s tough to do.”

Some of Maria’s Key Goals

- **Filling the gaps.** Like the other analysts on her team, Maria spends most days correcting and augmenting products details towards getting them to a publishable state. It’s a huge challenge triaging, sifting, and verifying the accuracy of disparate info. from different sources: A major reason why it’s vital for her to quickly see where info gaps exist, which products are ready to go, and which still have open issues. While Maria does much of this work herself there are some instances, like when a content snippet needs specific details she doesn’t readily have or something needs a specific manager’s approval, where it makes more sense to farm the task out to one of her colleagues to complete.
- **Seeking out efficiencies.** When she’s not chasing down fine details, the brunt of Maria’s material work can be tedious and time-consuming. So while she’s often looking for ways to improve her work flow and processes, she needs stability, performance, consistency, and predictability in her experience: “I’m a very structured, organized person and I like to know what to do when, and how to do it. So things like, getting info into Salsify should be as straight-forward as getting info out of it. I shouldn’t have to do the same things a bunch of different ways.”
- **Be a reliable and knowledgeable go-to-person.** When Ed or Sheila come calling, Maria wants to be able to react fast with intimate awareness of all available merchandise and categories in order to meet the immediate needs of retail partners and internal customers alike.

A Day in the Life

Maria’s days can be hectic. When she’s not in meetings, emailing, or on the phone chasing down product details, she’s busy updating and adding product data, fielding internal and external requests for specific product details, creating reports, and performing a sales analysis.

Maria gathers much of her product info from a variety of sales and marketing managers, and it comes over in all shapes, quality, and formats (Email, PDFs, image files, spreadsheets, docs, videos etc.). If she runs into a problem getting what she needs she reaches out to Sheila her manager for help.

On a weekly basis, Maria is asked to analyze sales trends to identify future opportunities, or determine the best assortments for a given channel.

About once a month she’ll do a trend analysis which means going to competitor sites to see what they have for retail availability by comparison. To accomplish this she typically examines competitor sites and competitor products on the same channels Southeast’s products are sold on to ascertain whether the maximum product offering possible is out there and if not, she can push to broaden their offering.

She’s also asked every so often to do consumer experience reviews a.k.a. “a scrub” of a particular retailer’s site to assess whether they have the correct content, available assortment, and merchandising information.

A good day for Maria is “knowing the grunt work I did is accurate or improves on what we’ve done, or are working on, and benefited someone, a retail partner, the company.”

Actions

- Fill product data gaps using the Readiness Reports
- Search for product details on request from sales
- Create a spec sheet for sales to give to customers
- Create a custom report of sales trends and histories
- Mine data to determine the best assortment by channel
- Update the annual product catalog

Real People on Which Maria is based:

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“Anything that makes for a more fluid experience, where content doesn’t need to touch so many hands, or cross so many desks, really makes my day.”



Sheila O'Malley
47, Sales Optimization Manager

Quick take on Sheila

Ambitiously skipped college and has risen through the ranks to her current role. Self-reliant, acute problem solver, and self-described “...people person who knows how to work a room, and get the job done.”

Role - *Director* | **Manager** | *Employee*

Computer Type / Skill Level

Laptop with external monitor / Intermediate

Major Pain Point

“I’m really looking for a more robust search. Sometimes I want to be brought to a specific SKU and other times I want to see everything that has that keyword so I can scroll through, even if I don’t know the SKU. I just want to be able to type, “DeWalt drills”, “18-24 volts”, and see a search page with all of those products tagged with that criteria.”

Some of Sheila’s Key Goals

- **Keep the trains running.** Much of Sheila’s time is spent ensuring her team of analysts is getting a steady flow of good product information from internal marketing and sales managers, so they can do their job — Ready product content for publication — effectively. More often than not it’s Sheila’s Job #1 to stay a level up, facilitating communication and smoothing friction points that inevitably crop up in the process of gathering, collecting, and verifying product information. Only when the wheels begin to come off the track does she escalate to her manager, Ed Dupont, to help run interference.
- **Stay fresh and above the fray.** Sheila likes to keep busy and doesn’t mind getting her feet wet from time to time — it keeps up her knowledge of product, and the Salsify app. She often jumps in to help when it’s crunch time, and she’s also responsible for training new users so staying current is important to her. But for Sheila time is money, so while she abhors repetition, she relishes consistency and repeatability: Sheila simply can’t let herself bogged down with intensely complex interactions or things that take too much of her time to learn or figure out.
- **Find detailed info quickly.** Because working in the app isn’t a day-to-day ritual for Sheila, it’s sometimes it’s hard to remember how to do certain things, or where specific info lives. Circumstances change rapidly and the needs she responds to are often immediate so she doesn’t have time to sift through piles of data, or make “stupid” mistakes that waste her time or worse yet — bottleneck her, the team, or the company’s forward momentum.

Actions

- Search and find a specific product and/or set up list of products going with few or no details
- Set up a product sell sheet
- Source product data and images for her team
- Gauge the readiness of products for publication
- Create a catalog of products for a trade show

A Day in the Life

Sheila isn’t in the Salsify app every day but she still likes being in the thick of things. She needs to keep up her knowledge of products and processes to remain fresh so she can triage process, train others, or communication issues that come up, and so she can easily report out or when necessary, escalate up to Ed when there’s bigger issues brewing.

On a daily basis, Sheila runs a morning stand-up with her team where everyone reports their status to ensure they’re focused on the right problems to solve that day.

Whenever there’s a big push or she feels that they’re falling behind, she readily jumps in to lend a hand.

Sheila has always struggled with being proficient with computers but can learn quickly from others on the fly. She’s had her fair share of suboptimal technology experiences — Among them: Failed hard drives, inaccessible network drives, all but unusable sales portals, and a complex SAP integration.

What Sheila may lack in formal training or education she makes up for with tenacity, grit, and perseverance. She hates slow progress, and abhors anything requiring lots of steps or needless repetition that doesn’t have a clear end in sight.

Sheila’s not so much afraid to make a mistake, but has come to expect that the tools she uses are just as easy as Facebook or Google or Amazon to use.

When she does make a mistake she likes them to be quickly correctable or better yet, easily reversible.

Real People on Which Sheila is based:

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