

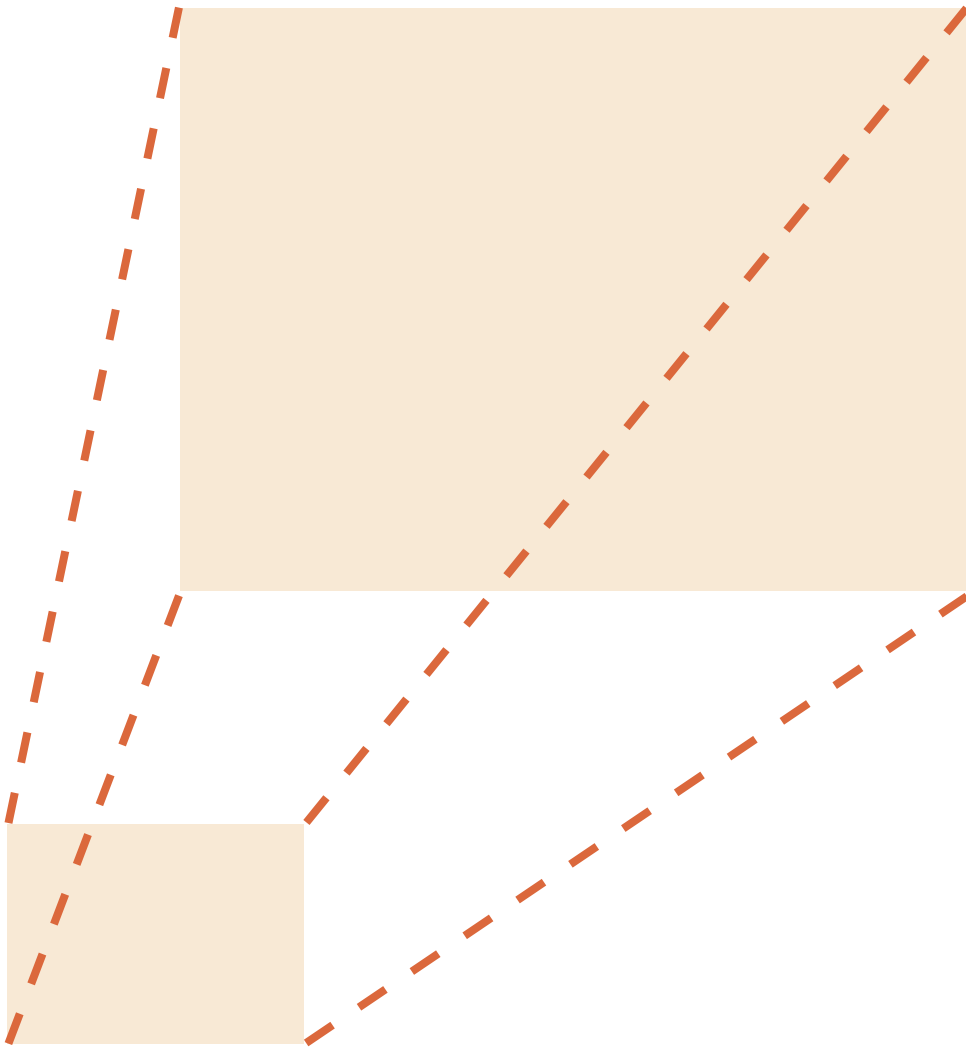
Managing journeys and personas at scale



OSAGE

- As a design and communication professional, you are likely familiar with the use of customer journeys and user personas to aid in the design of services and products.

But how do you approach this if the scale of your audience is very large and diverse? And what if the needs per segment differ drastically? Developing journeys and blueprints well takes quite some resources. Given this, how do you come to a comprehensive picture of your total audience? And how do you prioritize research, development and communication efforts?



A question of perspective

From years of working with complex journeys, we have found that the ability to zoom in and out, switching between individual needs and overarching patterns, is what enables real progress.

Zooming in

- Examine end-user needs and motives in detail
- Spot bottlenecks in processes
- Test and measure actual process improvement

Zooming out

- Ensure a uniform service approach
- Determine the significance of an individual process
- Prioritize improvements

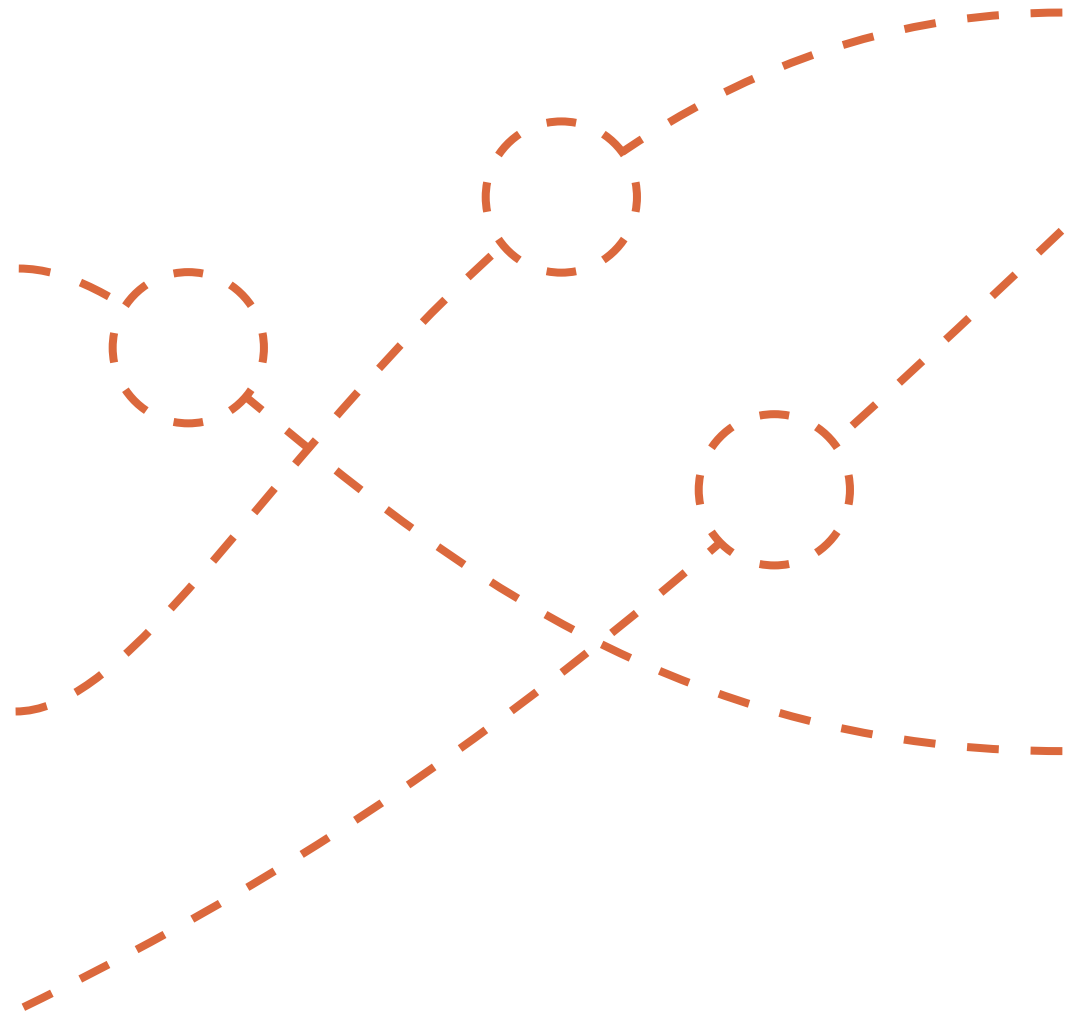
We have applied this layered approach across a range of public and commercial contexts; helping organisations steer strategic choices without losing sight of the people they serve. In this paper, we outline the methods to this layered approach.

Journey Management

In organisations where Customer Experience has yet to find a structural footing, journeys are typically addressed either at the macro level or in isolated micro efforts, with little connection between the two.

Through either a life cycle approach they have a broad picture, or they have detailed insights from isolated projects. In both scenarios, you miss an important piece of the puzzle. We have seen executives make decisions over lifecycle diagrams that had no direct bearing with customer realities. On the other side of the spectrum departments causing inconsistent service by not aligning their newly updated processes with other teams.

Journey management tools provide a solution to one aspect. These tools reveal the often missing links between micro processes (scenes) and broader life cycle phases, providing both a strategic overview and operational depth. This makes strategic decision making possible, and provides necessary context on a micro level. Theydo and Smapply are examples of journey management tools.



Persona Management

But what about personas? When designing a journey, the more specific it is tailored to a specific person's needs, the better it is received.

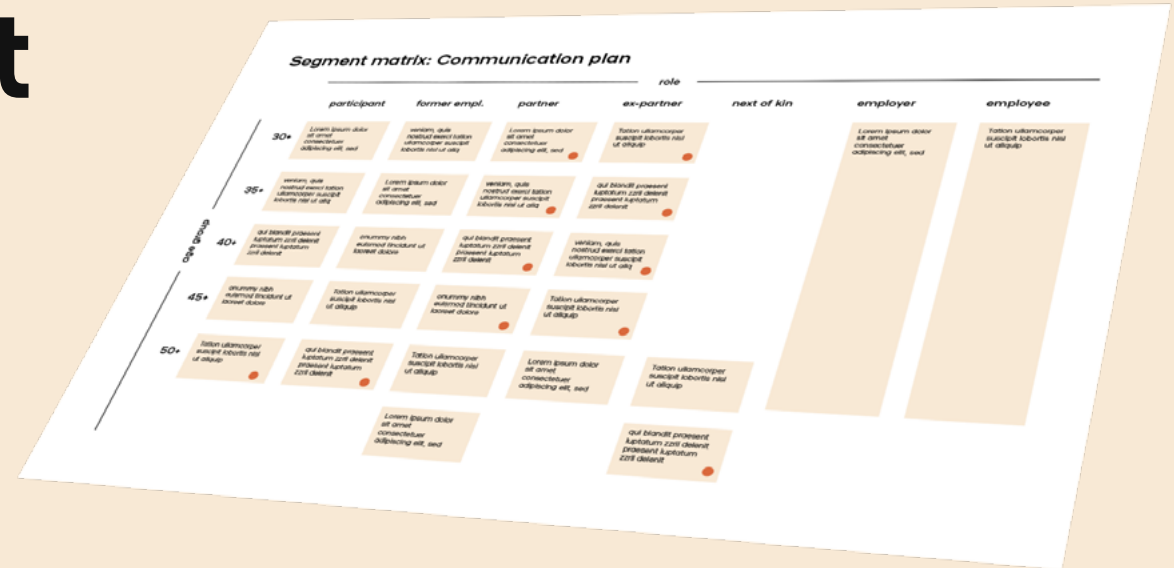
Actual persons can be grouped in personas, personas can be part of segments and ultimately make up complete audiences.

What goes for journeys also pertains to personas: A combination of overview and detail is valuable.

The current solutions to persona insights fall in two categories. On a Macro level, Customer Data Platforms provide quantitative data, and are mostly useful to sum up broad conclusions over a wide audience. Qualitative user research on the other hand, brings a detailed view of pains and needs, but is intensive and usually harder to relate to the bigger picture. Neither of these solutions bring a complete picture.



The Segment Matrix



We developed the Segment Matrix as a method to bring structure to segment, persona and user data. It offers a strategic lens for aligning research efforts, guiding experience design, and measuring outcomes with clarity.

It is ideal for organisations that have broad audiences, who want to take a structured and uniform approach of communicating to these audiences, while adapting to the differences of audience segments at the same time.


How does it work?


Defining a Segment Matrix is a relatively brief exercise, but requires a good understanding of one's audience, and a concise design approach.


- You define and prioritize common denominators within all audiences, and separate those into attributes and axes.
- With both axes and attributes, you populate the Segment Matrix, this is your framework in which you can easily identify differences and commonalities.
- By enriching this Matrix with user data the framework becomes a strategic instrument.


Benefits


This method works for a wide range of cases

 **Structured persona development**
The Matrix helps you understand which personas are necessary to develop within a project, and how important they are in relation to each other.

 **Prioritize qualitative research**
Some teams take decisions about user research arbitrarily. Especially when resources are limited, this method can show which areas are most important.

 **Broad but specific communication**
We applied this method to support national campaigns where audiences were both broad and highly differentiated. It supports inclusive communication, ensuring that no audience group is overlooked, while allowing for precisely tailored messaging where it matters most.

 **Help with user data architecture**
When setting up a Customer Data Platform, using this method brings insight in how to structure your dataset, and assists in gaining functional insights.

 **Setting up communication strategy**
With this method, we helped organisations create an overview of their audiences, and combined with user data, strategically prioritize communication efforts.

Why this works

Personas are sometimes seen as too anecdotal for rigorous application. As a result, organisations often hesitate to embed them into business-critical processes.

The Segment Matrix can combine multiple types of user data: both quantitative, hard data as well as theoretic models, and present this in an easy to understand overview. This makes the model useful for managers and specialists alike.

How to get started

- 1 Clearly define the scope of the Segment Matrix. Does it apply to the entire organisation, a single department or a single project?
 - 2 Make sure you involve both strategic and operational stakeholders when setting up a Segment Matrix.
 - 3 Before embedding them in operational systems, these matrices remain deliberately light-touch, easy to iterate and adapt to practical realities. Different axes and attributes prove their worth when applied to actual situations. Get familiar with the method and allow multiple drafts before implementing them in structural processes.
- ➔ OSAGE can assist you in this process, making sure you get maximum leverage from this method.

Would you like to know more?

Curious how this method could support your team or project? Let's talk.



Reach out via
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Roel Susan is a Service Designer with OSAGE. With over 27 years of experience in customer centric development, he combines his perspectives on design, software development and strategy to develop methods for complex problems.

Apart from the Segment Matrix, he devised SoftCSAT, the Customer Territory Model and is currently developing the AI Application Canvas. These methods combine strategic clarity with hands-on practicality, helping public organisations and commercial teams alike to navigate this complexity, always with simplicity as the end goal.



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