



# Future Personas

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Experience the  
Customer of the Future

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## CONTENTS

<b>1 /</b>	<b>Introduction</b>	<b>03</b>
<b>2 /</b>	<b>New Perspectives: Submerging Oneself in the Customer's World</b>	<b>03</b>
<b>3 /</b>	<b>Future Personas: Anticipating Tomorrow's Customer</b>	<b>04</b>
<b>4 /</b>	<b>Living Scenarios: Experiencing Imagined Futures</b>	<b>05</b>
<b>5 /</b>	<b>Springboards of Innovation: Stimulating Novelty</b>	<b>06</b>
<b>6 /</b>	<b>Future Persona Management: Leveraging a Systematic Approach</b>	<b>07</b>

## 1 / Introduction

Working with personas in the corporate sphere has become popular in the wake of the triumph of design thinking. The persona approach originated in the field of IT development where it has been used since the start for the early identification of and to take account of what customers required of various software systems. Today, many companies use the persona concept – more often in business-to-customer but also in business-to-business settings. This is hardly surprising given that the persona approach actually works! First, we'll explain why this is the case, then we'll address the question of how personas – which are usually rooted in the here and now – become future personas, i.e., people of the future who provide stimuli for innovation and marketing from a mid to long-term perspective.

## 2 / New Perspectives: Submerging Oneself in the Customer's World

All companies are familiar with the question: "who exactly are our customers and how can we develop an understanding of their requirements?" Personas help to give companies a more tangible understanding of their customers' "lifeworlds", i.e., the different ways in which they experience the world about them. They also contribute to discussions and a common understanding of these individual lifeworlds. Moreover, they trigger empathy – a central resource that is rightly viewed in the field of design thinking as a major source of innovation.

Personas translate abstract target group models or areas of need into specific, comprehensible life contexts, which function both at the objective and emotional levels. Those who take part in persona workshops soon encounter statements such as the following: "Great idea! That would be just the thing for (the persona) Mark!" Such statements indicate that the abstract persona has become a real flesh-and-blood person in the minds of the workshop participants.

Thus, the persona approach draws on the power of narrative. People love stories. Neurological studies suggest that our brains

react to fictional accounts with a similar level of intensity as they do to actual lived experiences. This is probably the reason why we remember information presented in narrative format significantly better than simple collections of facts. In stories, we conjure up virtual words that help us to better understand our own lives. We use stories to make our own world more accessible.

Therefore, personas invite us to immerse ourselves in the unfamiliar worlds of our customers, whereby they encourage us to shift our perspective: the customers' point of view comes to the fore. That gives us the necessary distance from our own products and services, which in turn clears the way for innovative approaches, and gives the necessary understanding of the customers' actual needs. Only then are we in a position to develop tailor-made solutions.

But, who is "the customer" whom we're discussing here? Like many tools, personas are first and foremost instrumental in reducing complexity. It would be impossible to get to know each and every consumer. By contrast, narrowing one's perspective to a single "prototypical customer", which used to be common practice in some circles, involves too narrow and, therefore, unreliable a reduction of the customers' lived reality. The persona approach is situated between these two extremes: whilst it does focus on certain archetypes, which necessarily involves a reduction of variety, it does not lose sight of the bigger picture.

### 3 / Future Personas: Anticipating Tomorrow's Customer

From a foresight research perspective, the following rarely asked question is of central importance: How can one ensure that personas not only reflect the lived realities of today but also those of tomorrow? Depending on the planning horizon with which a given company operates, this question is crucial to the success of the persona approach. Therefore, future personas, as we use them in our own work, are embedded in the company's vision for the future. There are two possible approaches. In the trend-based approach, personas are developed based on analyses of cultural and lifestyle trends. The scenario-based approach involves the integration of

personas in holistic scenarios based on plausible assumptions. In this way, trend reversals and disruptions can be considered in the course of persona development in the context of relevant scenarios – an option for which the trend-based approach leaves no room for flexibility.

In addition, it is clear that future personas must be constructed on a valid empirical basis. In practice, the Sinus-Milieus® (or similar models) used by many companies can serve as an anchor in the present. This approach offers two advantages: on the one hand, the milieu model brings the entire relevant population into focus as a research variable. On the other hand, the milieu-based approach allows for careful qualitative statements about the future size of the groups characterised by the personas. At the same time, we take account of future changes within the target groups. The market researchers and social scientists at the Sinus Institute (SINUS Markt- und Sozialforschung GmbH) continuously adjust their milieu model to take account of societal changes. When working with personas, it is important to anticipate these dynamics and to incorporate them in the persona set.

## 4 / Living Scenarios: Experiencing Imagined Futures

The second approach outlined above, i.e., the development of personas from a scenario-based process, is certainly the ideal solution. Both methods – the scenario technique and the persona approach – complement one another extremely well, both essentially being based on the development of narratives. Embedding future personas in a lifeworld scenario also serves as a corrective to market and lifeworld research that initially relates solely to the present.

Scenario-based activities are traditionally rather analytically oriented and involve working with critical uncertainties, examining imagined futures for consistency, and considering the interactions of various future-shaping factors. These tasks remain indispensable. However, companies in sectors with direct ties to end users often require more consumer-oriented pictures of future developments.

Our “living scenarios”, in which the dovetailing of imagined futures and persona portfolios plays a crucial role, take account of this.

The guiding principles of working with living scenarios are vividness and tangibility. The communication of scenario contents plays a significant role both within the project team and with other stakeholders within the company. Living scenario workshop activities are supported by live illustrators and persona role plays. Personas are brought to life using audio-visual systems and within the room: persona dialogues read by professional actors, illustrated storyboards (“a day in the life”) and the composition of immersive “future spaces” may all be used.

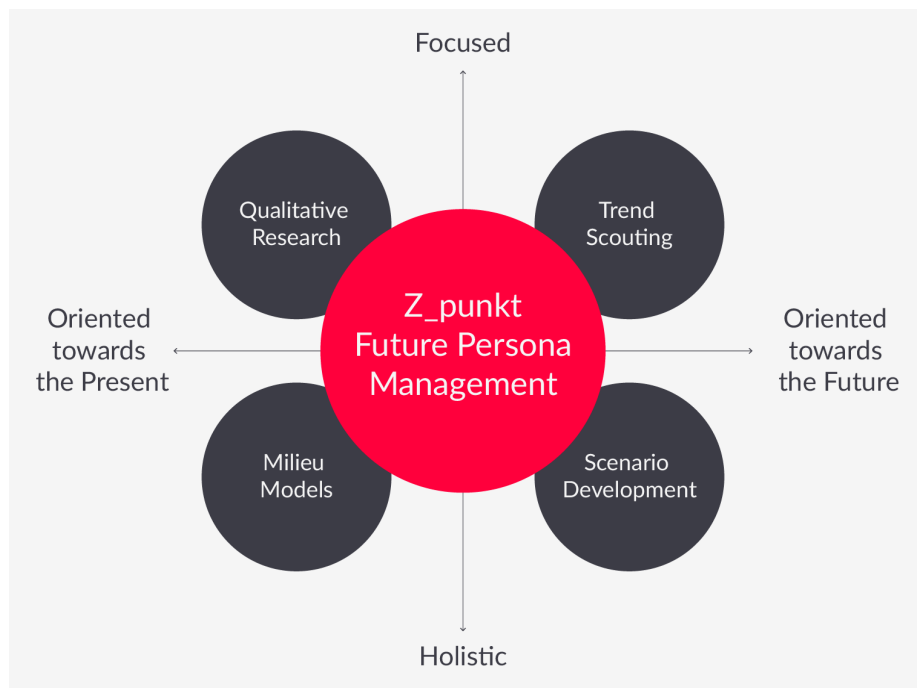
## 5 / Springboards of Innovation: Stimulating Novelty

Essentially, the future persona method as used by us helps to construct springboards of innovation, which means stimulating novelty in relation to future-oriented products, services, brands and marketing strategies. So, how do persona-based activities produce usable results that enable the company to break new ground?

The persona basically functions as a magnet that can attract, organise and collate ideas for novel products and services. What is important to the persona? What problems are they struggling with? The identification with the persona helps, in this context, to generate ideas that are sufficiently specific and meet concrete customer requirements. At the same time, we utilise a toolbox of concepts, such as “customer journeys”, “jobs to be done” or value proposition modelling that are, in our experience, eminently compatible with the persona approach.

In addition, personas are well suited to an initial validation of concepts. In a further iteration, conceptual prototypes are reviewed from the perspective of the persona and refined accordingly. Neither the generation nor the validation of concepts with the aid of personas need be restricted to individual workshops. Once a persona set has been established within an organisation, the personas soon become familiar acquaintances and established members of the company whose outlooks are automatically considered, for

example by product designers working on new interfaces. Personas are also an excellent resource from a marketing perspective, as they represent a concrete image of how specific target groups can be reached, with what messages and via what points of contact.



## 6 / Future Persona Management: Leveraging A Systematic Approach

Personas are currently en vogue, and are often developed simultaneously in different parts of a company, resulting in the risk of uncontrolled organic proliferation. Within the controlled context of an initial inspirational workshop, it makes absolute sense to develop personas based on gut feelings, and, for want of a better expression, as a proof of concept. However, this approach is risky in the mid to long term. One of the central objectives of using personas is to achieve a company-wide understanding and agreement about important customer groups. Stakeholders from various corporate divisions and departments talk to one another and get an opportunity to discuss at length their various perspectives in relation to customers. This effect is subverted if different business units each develop their own persona models. Therefore, to establish a long-

term persona management system within the company, access to personas needs to be placed on a more solid long-term footing. This applies to an even greater extent to the development of future personas designed to accompany the business on its journey to new markets. At the same time, there is no single approach to future Persona management that would work for all companies. That's why we utilise various methodological approaches (see graphic) depending on the task in hand. In addition to working with scenarios and milieus as outlined above, which represent systematic holistic approaches, qualitative approaches from the fields of consumer ethnography and trend scouting can also be productive in terms of persona development. Traditional social research methods are about anchoring future-oriented activities in the here and now, whereas trend research and futurology pursue an anticipatory objective, i.e., they attempt to predict future developments. Rather than playing one off against the other, both approaches should be melded into a single holistic strategy.



## About the Authors

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## About Z\_punkt

Z\_punkt The Foresight Company is a leading international strategy and foresight consultancy that focuses on strategic future issues. It translates findings derived from trend and futures research into practical advice to facilitate strategic management. Using corporate foresight processes, Z\_punkt helps companies to make the most of sustainable future markets.

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