

## CASE STUDY

# TEAMUP PERSONAS, 2017

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### SKILLS

- User interviews
- Contextual research

### TOOLS

- Close.io
- Intercom
- Skype

### ARTIFACTS

- Confluence wiki page

### PROBLEM

As a new employee, I lacked in-depth knowledge about our customers goals, needs, and motivations. In addition, our customer support team often prioritized feature requests based on frequency or recency of support inquiries instead of considering the overall impact on our customers. Leadership's vision and mission was to focus on the core customers we already have - and customers who share the same characteristics - instead of chasing outliers or "noisy" customers.

### SOLUTION

Initially, I leveraged the customer support team's strong institutional knowledge by setting up regular meetings to learn what issues our customers were dealing with and what problems they were using teamup to try to solve. I listened to customer support calls recorded in the Close app to write interview questions, then used Intercom to segment and message customers who fit the profile of the types of business we want to serve.



Interviews were conducted remotely via Skype, and recordings were shared with the team. Additionally, I found local fitness business owners who matched the profile of our customer base and shadowed them at their gym or studio to observe how they used their customer management software.

*Sometimes interviewing fitness professionals means getting dragged into a HIIT class.*

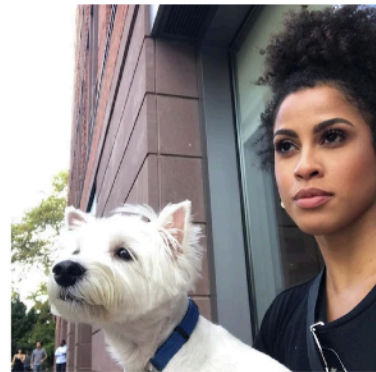
## RESULT

After writing up an explanation of personas - including how they differ from marketing personas - I documented each persona, including quotes from actual customers, goals, needs, pain points, and how teamup is uniquely positioned to help. We also aligned these personas with the customer types we were focused on pursuing. Publishing this document to the company wiki ensures it's available to all and can be a living resource, and we now refer to it in order to validate a new feature's utility to specific types of customers.

### Provider Personas

#### Trish, Tech-Avoidant

Trish started her business because she loves the practice (pilates, yoga, etc.) and has a personal story about how it's helped her overcome pain, injury, or other challenges in her life. She's very hands-on, and personally invested in the business. Trish may be comfortable with computers, but she'd rather focus on working with her clients instead of admin. She wants her business to thrive, but she's only interested in moderate growth, and refuses to sacrifice the quality and connection of her personal instruction. She runs the business and instructs clients, but might have another instructor or part-time admin (a spouse or friend?) because she finds the admin overwhelming and wants to focus on her clients. (Examples: Paula Gardiner, Diana Malone, Amy Darby, Jess Parker)



*"It just becomes the bane of your life, the admin, and if you're not teaching, you're at home, looking for your bank account, chasing people..."*

*"I'm a one-man band!"*

*"If it doesn't make my customers' lives easier, I won't use it."*

- **How she uses Teamup:** often on a mobile device, mainly uses day-to-day functions like checking people into classes
- **Values:** trust, connection with clients, high standard of practice
- **Goals:** wants to continue working with clients, not especially ambitious when it comes to growing the business
- **Needs:** tools that get out of her way and make her life easier so she can focus on helping her clients
- **Pain points:** too many tasks on her plate, interrupt-driven, often sees herself (as well as her clients) as "tech phobic"
- **How we can help:** simpler provider interface based on size/type of business, she ignores new feature messages so we need to communicate (new flags in the UI with walkthrus?) exactly how each feature will solve her problems.

*Screenshot of persona from the wiki page.*