



PERSONA EXAMPLE

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Pre-Sales Audience 1

Efficient Advancer



Jump In And Figure It Out

I want to spend my time working, not messing around with how our practice runs. When it comes to products and services, I want to choose them quickly, get them in place, make them work smoothly, and get back to work.

I focus my research time on key things for our practice. Based on conversations with my doctors, I have a few requirements in mind, and I match those to the available options.

I try to really get to the heart of the matter quickly. I don't want all the mumbo jumbo. When there's a problem with a service or a product I've purchased, I get the right people on it so it's resolved as fast as possible.

Name: Paul Sandler, Practice Manager

Quotes:

"I don't think it can be implemented without a clinical background. Our IT guy tried to do it and failed, but I was able to figure out how to set up templates in the system because of my clinical background."

"I really don't think the sales person has my interests at heart. He's just interested in the sale, and I've gotten bad information in the past. Now I check what the sales person says myself."

"Generally other people in the office call me when they need help. I don't manage the system but I figured out how to set it up on my own, and can usually solve most of the problems people are having."

The Way I Work:

- Show me where I need to go to just get started
- Figure out ways to work more efficiently
- Feel my clinical background is critical to implementing the system correctly (IT guy failed)

My View on Learning:

- Take pride in figuring it out myself
- Watch webinars to learn about the system/watch videos/read white papers

How I Get Help:

- Dig into the issue myself by trial and error to figure out a problem
- Call support and buy a support ticket if I cannot solve the problem

My View on Research:

- Ask people around me socially to see what others in my community have done
- Attend session conferences to learn ins and outs
- Dive in and figure it out on my own

What Makes Me Comfortable:

- Feel my personal experience is the best guide in deciding
- Rely on the trust I have in people I know if my personal experience doesn't tell me

What Frustrates Me:

- Feel annoyed the government is telling me how to run our practice
- Believe salesperson is interested in a sale, not my needs

Pre-Sales Audience 2

Reluctant Adopter



Worried Impact Will Outweigh The Benefits

I'm afraid the more complex systems will steal our focus from patients. If it's a simple service that has worked for years, great. I'm afraid we will lose time bringing up a fancier system or service, and if it fails, we'll lose time fixing it.

I'm afraid we'll spend too much money on it and see very little improvement. I'm afraid it will affect my relationships with my patients. I need to see the salesperson walk through my scenarios to see how it works, and to make sure it fits my practice.

I worry complex systems and services will come with problems and will consume time and money down the line.

Name: Dr. Robert Soldado

Quotes:

"My job was primarily to talk about what sort of clinical tools I'd like to have available and what would be a reasonable expectation for the amount of training and how much productivity could we tolerate losing while we made the transitions."

"I'm not all that good at finances. But we saw how much it cost in similar sized practices in the area, and this came in plus or minus ten percent."

"My office manager really worries if it will be able to maintain all the necessary confidentiality and still be able to provide information to other institutions as necessary."

The Way I Work:

- See evidence in other practices that it works- and isn't messing their practice up
- Pass all non-Doctor issues to practice manager when they're not my area
- Make a paper backup just in case- don't totally trust the system

My View on Learning:

- Feel really nervous about how to get started
- Pick up the phone and call support right away if there is a problem
- Feel concerned about the training/ramp-up time for a new system

How I Get Help:

- Tell the practice manager in charge of the system if there is a problem
- Ask my IT consultant to resolve the issue

My View on Research:

- Believe that someone else's experience is more credible than a salesperson
- Recognize I'm not the expert in looking for a system
- Research best practices for setting up template guides

What Makes Me Comfortable:

- Feel really comfortable having someone tell me exactly where to get started

What Frustrates Me:

- Worry that my bad typing will slow me down
- Worry that I may lose my patients data and that my practice will come to a halt
- Worry it's going to get between my relationship with my patients

Pre-Sales Audience 3

Pragmatic Browser



Make It The Best

I'm interested in the benefit the system or service will bring to the practice. I want the most improvement possible, so I'm willing to take the time to make the right decision. I gather requirements through a lot of internal discussions and validate them by talking to others.

I formally ask other practices about their experiences and will go to their practice to see how their system works. When the service or system has a problem, I take the time to find out what caused it. I want the problem resolved correctly the first time.

I'd rather spend more time up front choosing the right system than live with the wrong decision later.

Name: Dr. Rita Cartwright

Quotes:

"What I've done is try to talk to other people who had kind of similar arrangements or similar practice patterns and talk to them and their experience with the company and their responsiveness to complaints and issues and trying to work around- or to improve the product."

"I do go over how the purchase is going to impact on my support staff then I'll kind of go over the ideas and kind of solicit their feedback. But in general I'm kind of the final bottom line is ultimately gonna be my decision."

"When we implemented the electronic medical record we had somebody on sight for ten days to get everybody up and running and familiar with the software."

The Way I Work:

- Hold meetings with the practice to discuss what we're going to do
- Figure out ways to work more efficiently
- Feel comfortable letting my partners decide

My View on Learning:

- Call salesperson for demo first rather than look online
- Ask tech-savvy nurse when there are problems

How I Get Help:

- Call support to get to the root of the problem, paying extra if I need to

My View on Research:

- Decide to start looking because of incentives
- Get recommendations from other physicians
- Use stimulus funds to implement

What Makes Me Comfortable:

- Feel assured my vendor will be on site to work with me when I implement their product
- Get acclimated system slowly by using it for first/last patient of the day

What Frustrates Me:

- Feel frustrated when people showing me the technical capabilities rather than its practical capabilities
- Recognize it may be harder for me to get up to speed because I'm older