Through Your Donors' Eyes; Using Personas for Journey Maps

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Introduction

As our donors continue to evolve in the ever-changing world, it is becoming increasingly important that we empathize with our donors to surpass their expectations.

This session will introduce a few key tools to help you see your world through the donor's eyes. We will learn to transform what we know about our donors into applicable personas and how to use the concept of journey maps to aim for the intended sentiments of our donor personas as part of our day-to-day work.

And lastly, let's see how we apply both concepts in real-world donor scenarios.

Personas
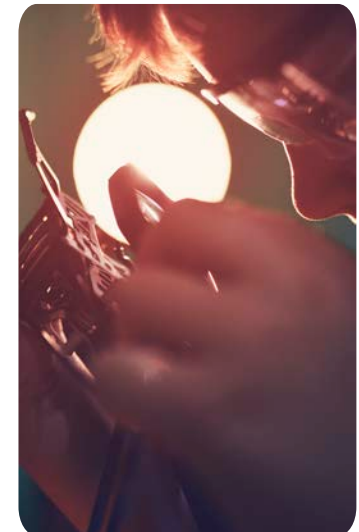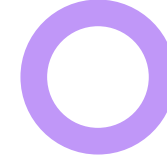
Through Your Donors' Eyes; Using Personas for Journey Maps

What are personas?

Personas are **representation** of your donor base.

Personas are **fictional** and represent essences of real donors.

Each persona represent a group of donors with similar **needs**, **behaviours**, **goals**, **motivations**, etc.
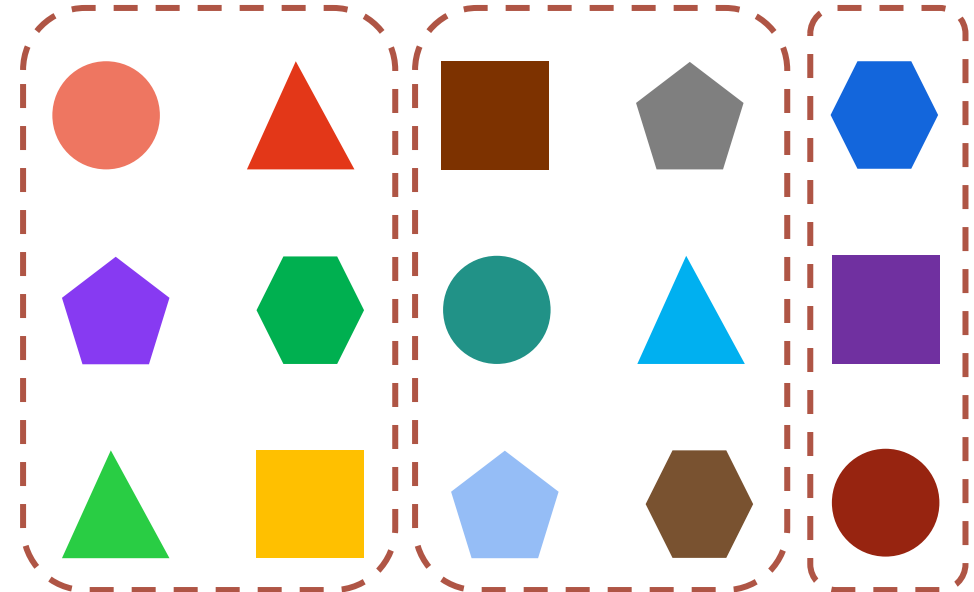
Tyler - Digitally Savvy Student

Deb - Busy Professional

Nina - Retired and Active

Why do we need personas?

Personas help us **empathize** with the spectrum of people that will interact with our organization.

Personas give us **unified understanding** of our donors throughout the organization.

Personas help us consider for a more **personalized** approach when we go through donor impacting changes and/or initial implementations.

Having well constructed, **outside-in** personas means you can efficiently **tailor** your organization to deliver most value to large groups of donors.

The Organization

How to construct personas

1. Define the scenario or interaction in question.

2. Collect information about your donors.

3. Identify trends and patterns to group your donors into groups with similarities.

4. Use each group to create the personas, add details.

5. Discuss, Prioritize, Conclude

NEEDS

BEHAVIOURS

GOALS

MOTIVATIONS

Persona Template Example and Explained

Persona Name
Persona Type

About me

- This area is a quick overview of the persona type. Include information like demographic factors, lifestyle, interests or values to bring life to this persona. Interactions with other brands can also help readers relate and empathize.
- A quote or a scenario might be appropriate for a specific project.

Donor profile

- A high level overview of the donor's interaction with the organization.
- Imagine how the donor might want their experience to be.
- Describe their desire to engage with your organization (motivation), their loyalty, tenure, pain points, needs and expectations.

Content below the dotted line will be updated to provide information relevant to the project at hand.

Donation event (or another specific scenario)

- Focus on the persona's in-centre visit, what are the persona's preferences (e.g., time of visit, which centre), challenges (like deferrals) and behaviours.
- Both qualitative and quantitative data would be appropriate for this section.

Attendance rate *Low ....High*
- *How likely are they to attend?*
- *Do they need reminders, if so, when?*

Brand advocacy

- This section should represent the persona's awareness and promotion of the brand (e.g., advocacy on social media, champion for group visits).
- Could also describe the persona's participation like donating multiple products, volunteering, etc.

Engagement pre-and post donation (or another specific scenario)

- Describe the persona's preferences and behaviours outside of the donation event (e.g., appointment booking, preference for questionnaire platform, use of webchat).
- Both qualitative and quantitative data would be appropriate for this section.

Digital savviness *Low ....High*
- *Website browsing, not active on social media*

Persona Exercise

Persona Exercise Instructions
Tyler, Digitally Savvy Student

Scenario

- We are looking at ways to better engage this type of donors.

- We would like this type of donor to donate more often or more products.

- We would also like to ensure they attend their appointments.

Research Findings and other Data Points

- They are from urban centres.

- They are from age 18 – 25.

- They speak English fluently.

- They are active on social media and want to feel connected.

- They are well adapted to the digital world.

- This group of donors has made less than 3 appointments.

- This group of donors has attended 0 – 3 donation events.

- This group of donors lapsed more than 5 – 6 months at a time.

- They are usually short on time and therefore value how their time is spent.

- They aspire to be physically active and healthy, however, they are unsure where to obtain proper information from.

- They want to feel like they are contributing positively to the world.

- Independence and being self-sufficient is important to them.

Persona Template

Tyler
Digitally Savvy Student

About me

Donor profile

Donation event (or another specific scenario)

Attendance rate   *Low ……………….…High*

Brand advocacy

Engagement pre-and post donation (or another specific scenario)

Digital savviness   *Low ……………….…High*

Persona Exercise Debrief

Tyler
Digitally Savvy Student

About me

- Tyler (he, him, his) is a 21-years old university student. He's busy trying to integrate his studies with his busy social life, sports and family. Our donor centre is a bit far for him, still, he tries to donate when he can, usually at mobile event.
- He likes **affordable and quality products, easy customer service like self-serve digital experiences**, and efficiency to save time.

  Tangerine   NO FRILLS
  Tim Hortons amazon

- Tyler likes donating blood because he believes it makes an impact and it's convenient for him. He is, however, struggling to keep to donation schedule because he is juggling a lot and he doesn't remember to book his appointments.

  "I get taken into so many directions and trying to be impactful in so many aspect. I try to do good when I can and wish I can contribute more."

Motivations and influences

- Tyler grew up with misconceptions about blood donation.
- Tyler started donating blood with his friends at the campus mobile event. He never donated anything else. He particularly likes that he's making an effort to save lives.
- He really likes to walk in and donate. With the organization requiring appointments, he's struggling to plan in advance.
- He does not see the organization as any different from Apple and Amazon, nor does he feel that he should.
- If possible, he books last minute, and he doesn't read any prep material we send him through email.
- When deferred, he doesn't know what questions to ask but often wanders off with doubt and negative feelings.
- Tyler feels valued when he knows that his donation helped to save someone's life and when his peers like his donation social media posts. He has used the centre's Instagram wall a few times.
- Tyler also feels connected to his friends through common interest when he is able to donate with them as a group.

Donation event

- For perms, Tyler likes to visit on Thursday or Friday afternoons as he winds down for weekend, though he prefers the mobile event. He also likes the donation to be quick and thinks the overall process should be easy. He can't understand why we don't have the latest technology.

  Openness to change Low ....High
  - *Is not very familiar with our processes and so change often goes unnoticed*

  Attendance rate Low ....High
  - *Always juggling multiple priorities*

  Deferral acceptance Low ....High

Brand advocacy

- Tyler is not aware of the organization as a whole or opportunities to donate other products. However, he does post on social media when he donates.
- He is very open to donating what's needed and he appreciates the explanations.
- He likes how our organization contributes to society but we don't engage him well. He doesn't follow us on social media or doesn't read our news online or on print.

Interaction preferences

- Tyler does not follow our social media because he is not excited by the content.
- He appreciates reminders to donate but he doesn't click on other reference or marketing emails.
- To go swiftly through his donation, he completes the questionnaire on his way over to the centre. He often forgets to bring his donor card and gets upset about the manual check in.
- He has called us being concerned about not feeling well the next day.

  Digital savviness Low ....High
  - *Uses the app exclusively, active on social media*

  Preference for self service Low ....High
  - *Prefers to do things himself. Where not possible, he expects quick responses, via any channel of his choice.*

Journey Maps

Through Your Donors' Eyes; Using Personas for Journey Maps

What are journey maps?

Journey map is a **tool** to help donor accomplish what they intend to do.

The **facilitated, collaborative working session** allows stakeholders to experience interactions like a donor.

The tool gathers **qualitative and quantitative** data to understand the donor's **expectations and their pain points**, from services delivered by a brand at various interaction points.

Journey map, when used with personas, help us focus designs and improvements around **empathy** and **human success**.

The Organization

Journey maps <u>are not</u> about internal/business processes as these do not concern donors.

Selling points of journey maps

Help us **empathize** with donors through use of personas.

An **outside in** perspective, see through your donor's eyes.

Align the stakeholders, breakdown silos.
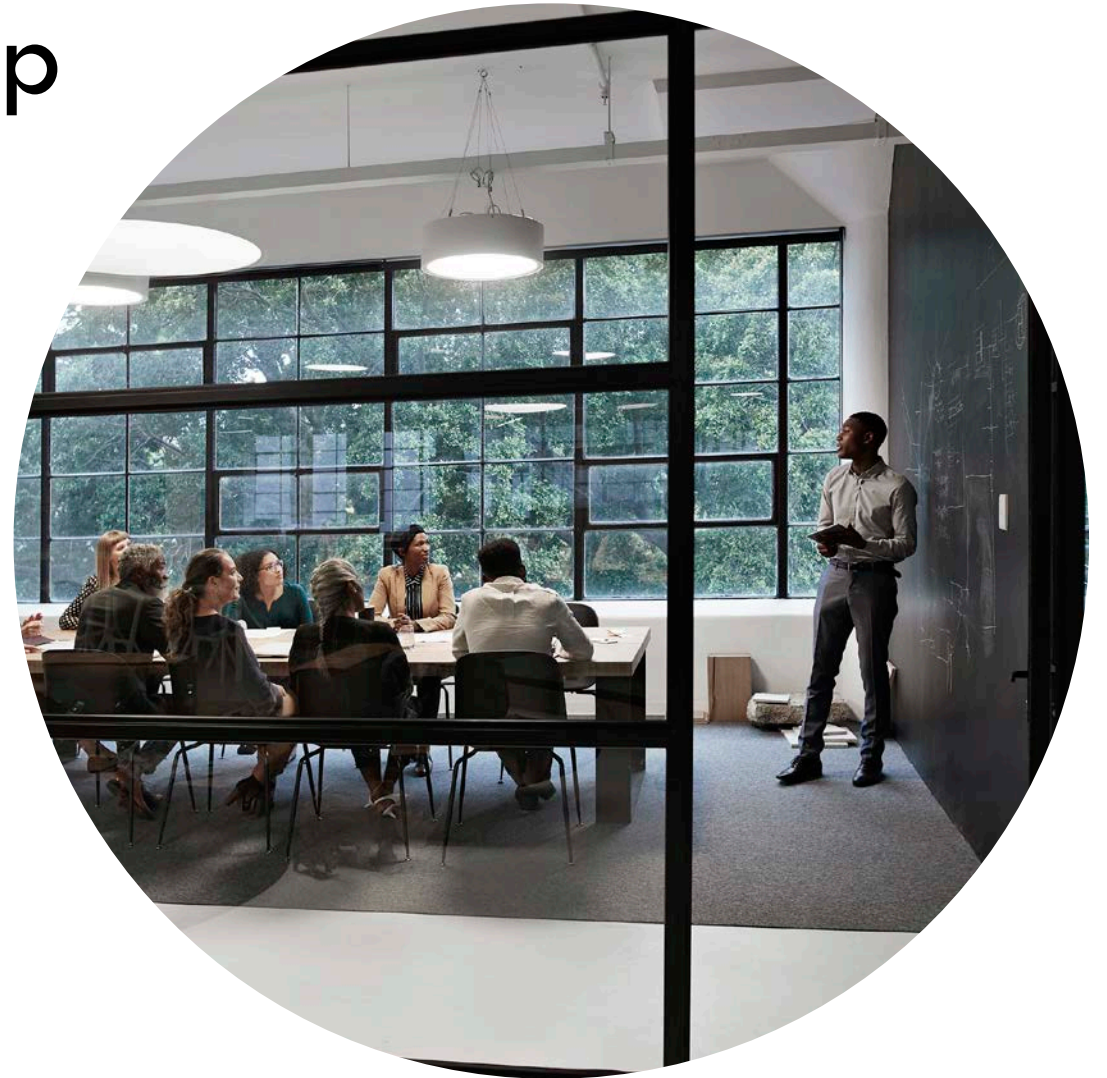
Make issues and opportunities **evident**.

Allow us to identify **interrelationships** between steps/phases in the donor journey.

Through Your Donors' Eyes; Using Personas for Journey Maps

How to do a journey map

1. Define the scope of the journey to be explored.

2. Obtain relevant personas and use one at a time.

3. Determine important swim lanes to place on the journey map template.

4. Gather data and metrics if possible.

5. Invite stakeholders to participate for alignment, if possible, choose stakeholders close to personas.

Journey Map Template Example and Explained

Journey Name	Notes	Understand / Consider	Register / Book	Donate
Moments that matter	What is the donor trying to accomplish? What would success look like for donor?			
Pain points	What are the pain points for donor? What are their challenges? What are their barriers?			
Sentiments	How does the donor feel? How would they perceive the interaction? Do they perceive that they had successfully accomplished what they had intended?			
Intended sentiments	How do we want the donor to feel? To what extent do we want the donor to be successful?			
Questions / concerns	What is the donor thinking? What questions or concerns would they have?			
Data / metrics	What kind of operational data, metrics or research findings do we have?			
Interaction point (e.g., who is servicing the donor?	Who from the organization is servicing the donor? What asset is the donor interacting with? Which interaction channel is the donor using?			
Enablers	What are the improvement opportunities to enhance the donor's experience? What enablers can we install to improvement success rate for our donors?			

Journey Map Exercise

Journey Map Exercise Instructions
Tyler, Digitally Savvy Student

Scenario

- We are looking at ways to better engage this type of donors.

- We would like to reduce no shows for this type of donors.

- We would also like ensure their donation visit is as smooth as possible, including mitigating the possibility of being deferred.

Instructions

- Use Tyler, Digitally Savvy Student, as the donor persona.

- We need to make Tyler successful in what he needs to do.

- Put yourself in Tyler's shoes.

- If possible, allow folks that have connection to or know a donor like Tyler to advise you, better if you have this type of donor directly participating.

- Choose a phase of the journey that you want to work on.

- Try and discuss through as many swim lanes as possible.

Journey Map Template

Donation Journey	Understand / Consider	Register / Book	Donate
Moments that matter			
Pain points			

Journey Map Template

Donation Journey	Understand / Consider	Register / Book	Donate
Sentiments			
Intended sentiments			
Questions / concerns			

Journey Map Template

Donation Journey	Understand / Consider	Register / Book	Donate
Data / metrics			
Interaction point (e.g., who is servicing the donor?			

Journey Map Template

Donation Journey	Understand / Consider	Register / Book	Donate
Enablers			

Journey Map
Exercise Debrief

Journey Map Template

Donation Journey	Understand / Consider	Register / Book	Donate
Moments that matter		• Tyler needs to find best time and location to donate. • Tyler needs to complete booking. • Tyler needs to be informed of donation eligibility and other criteria that will make donation more successful like a good night sleep or waiting the number of days after travel.	
Pain points		• Can only book via phone or website or in person. App is not available. • The website is cumbersome to view on mobile because it's not formatted properly. • The centre is a bit far from campus and its nearby student neighbourhood. • The campus mobile event is only one day every 6 months and the notice to the student population is about a few weeks. • Extremely hard to coordinate booking time with groups of friends, cannot find the exact number of timeslots available for his friends without trial and error.	
Sentiments		• Tyler is feeling excited and looking forward to donation. • Tyler is disappointed and feels there are technology barriers for him to book the way he likes, like an app. • Tyler is frustrated that the website is hard to view and navigate on his phone. • Tyler would like to bring more friends to donate with him but he feels it's too much work for him to organize. • Tyler often finds it hard and cumbersome to navigate eligibility and he doesn't really know what could make his donation goes smoothly. • Tyler is feeling a bit stressed that when the donation time comes, something else in his life might take priority and then he won't be able to donate for another 6 months or would have to travel to the perm.	

Journey Map Template

Donation Journey	Understand / Consider	Register / Book	Donate
Intended sentiments		• We want Tyler excited and positively looking forward to donation. • We want Tyler to be talking about his booking to his friends and family. • We would like Tyler to post on his social media about his booking with excitement and anticipation. • We want Tyler confident that he knows what to expect and how best to avoid deferral.	
Questions / concerns		• Am I eligible? • Am I healthy enough to donate? • Will donating interfere with my lifestyle, like sports, alcohol consumption, exams? • Will my vitamins or diet get me deferred?	
Data / metrics		• No show at the campus mobile is 10% higher than other sites. • Cancellation is also 5% higher than other sites. • The drop out rate on website is about 50%. • Only about 5% of this type of donors book from contact centre. • Almost no one book via visiting a site. • The website also crashes periodically, averaging about once or twice everyday for the last year.	
Interaction point (e.g., who is servicing the donor?		• Contact centre • Booking website • Donation centre	

Journey Map Template

Donation Journey	Understand / Consider	Register / Book	Donate
Enablers		**Quick Wins** • Earlier advanced notice to the students of the mobile date; 3 weeks → 5 weeks. • Reduce hours each day but extend the number of days on campus; 8hrs → 5hrs, 1 day → 3 days. • Provide bi-weekly reminders for appointment and opportunity to reschedule. • Host information session prior to donation, in person and virtual, for eligibility and other donation related questions. **Mid Term Wins** • Increase mobile events to campus due to demand; 6 months → 4 months • Launch mobile friendly version of the booking website. • IT to improve working condition of the booking site. • Coordinate mobile events with other campus events like career days or sporting events, avoid exams and tests. • Make eligibility and other deferral related questions simple, organized, easy to navigate on website. • Launch social media assets for Tyler to brag on social media platforms. **Long Term Wins** • Launch mobile app. • Increase accessibility and convenience for Tyler by doing research for a perm in the student neighbourhood. • Work with university courses and other resources like campus healthcare to continuously educate and advocate blood donation. • Launch group booking for Tyler and his friends, so that they can come as a group and donation can be seen as a social event.	

Thank you

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