



DATA-DRIVEN PERSONAS

Generating consumer insights with the use of clustering analysis from big data.

Liset Molenaar, 22/04/2017



The UX Specialist

"I want to share my knowledge"

Margareta

42 years old, lives with daughter and husband in a house nearby the sea. Has worked 16 years as a UX specialist

based on interview and observations IRL

PERSONALITY

Idealistic Loyal Curious

Quiet Reflective

Idealistic Laid-back

"Seeks understanding and is adaptable."

based on Myers-Briggs Type Indicator (MBTI)



Technology expertise level

based on interviews and observations IRL

Adobe Photoshop & Illustrator



Omnigraffle



Visio



Using social networks



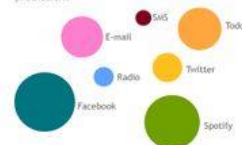
Devices used

based on interviews and observations in clinics



In attention while working

predictions



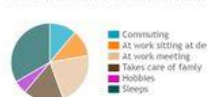
User experience goals

from strategy management



Normal days

based on interviews and observations in IRL



Is passionate about creating great user experiences and to share her knowledge. Work both with hardware and software products. Is not a morning person. Loves co-creation with others.

based on interviews and observations in IRL

Personas

- Describes a type of person
- Creates empathy
- For design purposes

Mariah-Super user/Functional administrator



BACKGROUND

Age: 34
Education: Diploma in bookkeeping
Years of work experience: 11
Job title/role: Super user/ Functional administrator
Works at: Fancy Accountancy

Optimizing the processes by digitalizing, and the key factors in the modern accountancy

TYPICAL SCENARIO

Every day when Mariah starts her work she checks if any new clients have been accepted. She makes sure that their existing administration is setup well. She usually has a checklist and takes care of. After she is done with the administration she creates the users and will define the roles and rights for the office users based on the tasks they are responsible for. She will also fill in for the team leader if he is not there or he is too busy.

WORK LIFE

I have been working here for a couple of years now. When we started working with Exact Online I volunteered to participate for its trainings. This way I learn everything about the software and can teach colleagues about it or help them whenever they have a question. I find it challenging specially in the beginning I had to call Technical support quite often to figure things out.

TASKS

- Set-up
- Create
- Train
- Advise
- Keep
- Manage
- Help

GOALS / CHALLENGES

- Learn all the details about EOL
- Teach colleagues EOL functionalities
- Find the best-of-breed software

LIKES / MOTIVATIONS

- Being able to do her tasks as an accountant
- Learning about new technology available in accountancy field

EXACT SPECIFIC

Most used screens or processes

Balance sheet/P&L
Bank - To be completed
Digital postbox
Master data

Time spent using Exact Online: 6-8 hours

Ben- Partner/Owner



BACKGROUND

Age: 52
Education: Chartered accountant
Years of work experience: 25
Job title/role: Partner/Owner
Works at: Fancy Accountancy

MAIN POINTS

- Ambitious
- Outgoing

Our mission is to always give clients insight on their business so that they can become better business owners

TYPICAL SCENARIO

Every Monday when Ben arrives at the office he checks the financial status of the accountancy. He gives direct attention and if not then he checks how his team leaders/relation managers are doing. In the client, Ben sits with his relation managers/team leaders to plan the tasks based on the budget they have and to roll out the tasks.

WORK LIFE

About 13 years ago I started this accountancy office with a former university friend. Now we've grown to 20 employees and I'm really proud of what we achieved. My partner and I are always looking into ways to run our practice as efficiently as possible. For instance in order to plan the work efficiently we involve our team leader, John. This is because he has a better insight into the expertise of the employees and the work load they can each handle. Managing our budget well and planning the workload right gives us the possibility to offer high quality service to our customers which is an important driver for us.

Tech and communication tools used:

Telephone, SMS, Teamviewer

Tasks

- Planning the budget
- Planning the tasks
- Taking in new clients
- Managing the team

GOALS / CHALLENGES

- Building a trusting relationship with clients
- Getting a good reputation in the market
- Advising clients on having a financially healthy business
- Keeping pace with the new software technology
- Thinking of new revenue models

LIKES / MOTIVATIONS

- Running the practice efficiently
- Giving accurate and accurate advice to clients about their business financials
- Digitalising the processes

EXACT SPECIFIC

Most used screens or processes
Balance sheet/P&L
Outstanding items (Debtors and Creditors)
General ledger transactions
Import statements, Statements to be completed

Time spent using Exact Online: 4-8 hours

John - Relation manager/Team leader



BACKGROUND

Age: 39
Education: Bachelor's degree in Economics
Years of work experience: 8
Job title/role: Relation manager/Team leader
Works at: Fancy Accountancy

MAIN POINTS

- Diligent
- Hardworking

Offering high quality service to the clients and advising them on their business is my passion.

TYPICAL SCENARIO

Everyday when John arrives at the office he checks the status of the tasks which need to be done by his assistants. He sets deadlines otherwise there will be consequences for his clients. When deadlines are getting closer he sends a reminder and they do not have to rush and the quality of their work will also be better.

WORK LIFE

After I graduated from university I worked as an assistant accountant in a small accountancy office for a couple of years. I worked my way up the ladder pretty fast after I got my certification in Management accounting. I've been working here for a year now and am responsible for 5 assistants.

Tech and communication tools used:

- Whatsapp, Email, Telephone

TASKS AND RESPONSIBILITIES

- Coordinating the planning at the office
- Checking up the progress of his assistants
- Controlling the quality of the tasks
- Having frequent contact with clients
- Updating the partner over clients
- Partner can properly advise the clients financially healthy

GOALS / CHALLENGES

- Making optimal use of his assistants' competencies at the time of planning
- Helping the partner to plan the budget efficiently
- Making sure that all assistants are on time with their tasks

LIKES / MOTIVATIONS

- Providing clients with good quality service
- Providing the partner with actual figures regarding clients' financial status

DISLIKES / FRUSTRATIONS

- Assistants' mistakes

EXACT SPECIFIC

Most used screens or processes
Balance sheet/P&L
Bank - To be completed
Digital postbox
Master data

Time spent using Exact Online: 6-8 hours

Suzan - Assistant accountant/Book keeper



BACKGROUND

Age: 32
Education: Diploma in Accounting
Years of work experience: 6
Job title/role: Assistant accountant/Book keeper
Works at: Fancy Accountancy

MAIN POINTS

- Precise
- Organized

Accuracy and keeping a neat record of data, that's what accounting is about.

TYPICAL SCENARIO

Suzan is most of the time busy with entering clients' financial information in their journals. She gets very busy when it gets close to the end of month, that is when the VAT return is due. Most clients who are not on time with sending their documents, send them at the end of the month. This puts a lot of stress on her and sometimes she has to work over hours to meet her deadlines.

WORK LIFE

I've studied accounting when I was at school. Right after I was graduated I started working as a bookkeeper. I like to keep a balance between my professional and private life. By working half-time I can maintain that balance and I'm very happy about it.

Tech and communication tools used and desired

Email

TASKS AND RESPONSIBILITIES

- Do customers' book keeping
- Control and correct the data of the clients who do their own bookkeeping
- Keep a neat record of the clients' documents

GOALS / CHALLENGES

- Meeting deadlines

LIKES / MOTIVATIONS

- Doing bookkeeping for clients

DISLIKES / FRUSTRATIONS

- Controlling and correcting clients' bookkeeping details
- Clients who are late with delivering their receipts and bank documents

EXACT SPECIFIC

Most used screens or processes
Sales entry (Inkoopboek)
Purchase entry (Verkoopboek)
Digital postbox
Bank - To be completed

Time spent using Exact Online: 4-5 hours

“I think it [persona] is a **communication tool** to look at the product from a **user perspective.**”

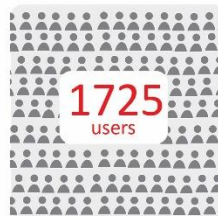
“I think we should make a filter on clients, John
(client manager) will make use of it.”



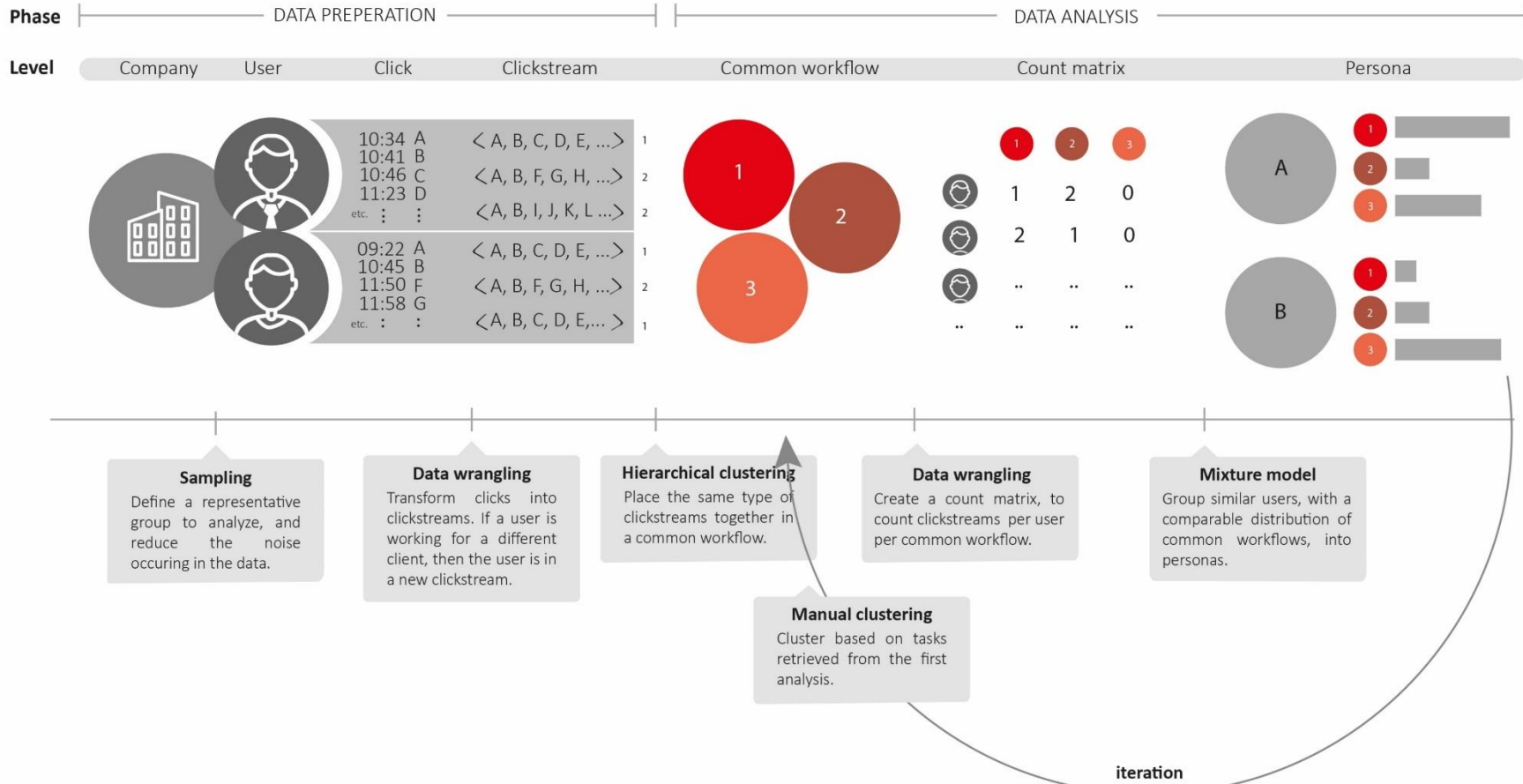
PERSONAS BASED ON DATA

Retrieve similar users based on ... software behavior.

Dataset



Approach



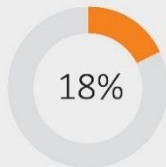
Result: clusters

Process & match

This persona is more likely to perform tasks in **banking**, **zooming transactions**, and **digital postbox**. This means that this user type is processing clients' invoices into the system, and place them in the right journals. Some will relate this with bookkeeping, however, in order to be explicit, this is better recognized as "processing". Furthermore, this user type is also matching bank statements (doing payments) which is connected to the "banking" area.

On top of that, this persona shows more activity over the different tasks than other user types, produces more clickstreams per day than other user types, and produces more unique clicks than the average (1.5 time average). This indicates that this user type is a **relatively active user**.

Group size



Payroll focus

This user type is most likely to **process payroll entries**, and perform tasks similar to a payroll bookkeeper (salarisadministrateur), which could be looking at and changing **information about a specific user** or perform **payroll declarations**.

This user type is working for on average 59 clients, which is a lot more than average. Besides, this user type shows a higher mean activity over time, and performs more unique clicks than average. From this can be concluded that this user type is doing a variety of tasks for a lot of clients, which indicates he or she is using Exact Online extensively.

Group size



Core accountancy

This user type has everything to do with the "core accountancy" practices, which is **VAT declaration**, **creating a financial year**, and **printing a G/L report**. Besides, this user type is most likely to **zoom into transactions**. These tasks are related to the accountancy practice since it relates to using the transactions in Exact Online to perform financial related tasks (e.g. create a financial year).

Furthermore, this user type works for around 26 clients, which is around average. The activity is somewhat low, and unique clicks are also lower than average. This might indicate that that these users perform relatively **focused tasks that take more effort**.

On top of that, there was a positive correlation that indicates that when administration offices are bigger, it is more likely the number of user types three is also bigger.

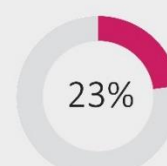
Group size



Client focus

This user has a focus on clients, which is reflected in **searching specific client transactions**, and **checking the company card**. Furthermore, these users show low activity and work for less clients than average (13 clients). This indicates that this user type is a relatively inactive Exact Online user. The reason behind the low activity could be that this user type does not have a lot of intensive tasks to perform with EOL, these tasks are more related to "checking" specific parts. His or her tasks might be performed outside the EOL domain.

Group size



Nice, but not very engaging.



Analogy: spider in a web

The web of the spider is the backbone, the financial administration, which gives a clear overview. The flies in the web represent requests from clients that need to be solved/tackled. In busy periods, there is no time to have a look and assessing the situation. The spider goes from request to request.

What the client wants

Tasks are executed on request of a client, or planned in advance (e.g. financial year). This makes Joost flexible in shifting between requests. If many clients need his attention, he feels overloaded and just performs the tasks he needs to do. He will not do extra (unrequested) work in busy periods.

Administration as backbone

When the administration is complete, Joost has a clear overview of the financial situation. In some cases he will perform controlling tasks, in others he'll use it as guide for creating the financial year.

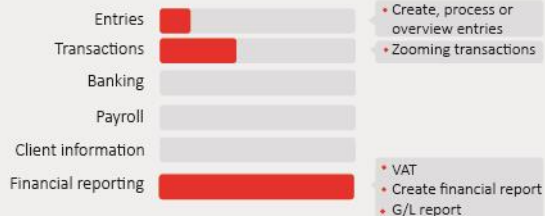
Deep knowledge

Since Joost is performing more focussed tasks that requires more knowledge. He wants to be treated as a professional by his clients. And not as a "pain in the ass" when asking for the right documents.

“

I try to achieve what the client wants, in the most efficient manner.

Main tasks



Group size



Persona summary

The main tasks can be summarized as "core accountancy" tasks, that relate to financial situations (e.g. create financial year, printing reports). Joost works for around **26 clients**, which is around average. The activity is somewhat low, and unique clicks are also lower than average. This indicates that he performs relatively **focused tasks that take more effort**. On top of that, when administration offices are bigger, it is more likely that the ratio of persona Joost is more present.



“

I am keeping a neat record of the data, sometimes that is a real challenge.

Organize the chaos

If everything is booked in a structured way, Clara feels satisfied, because one can get overview and insights from an organized administration. In some cases, clients' administration is chaotic. Organizing this is what Clara does, but not necessarily likes.

Precise administration

In order to reflect with reality, everything needs to be precise and 100% the truth. Clara likes exact numbers. Some clients are not like her, which results in a challenging collaboration. After a while, she accepts that some clients have a different view on being precise with their administration.

Delivering documents is key

Some clients deliver their documents in a very chaotic way or are too late. As a result, Clara does not have time left for additional questions, since the deadline needs to be met (due to VAT declaration). Especially new clients are hard to deal with, because they do not know how to deliver their documents yet. It are mostly the same clients who need to be educated and reminded of good delivery of documents.



Analogy: busy bee

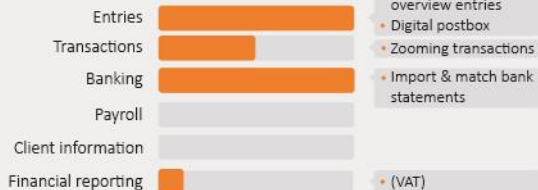
The bee represents Clara, which makes honey in a very structured way. The bee is very productive (busy) in completing the tasks (making honey). The end result feels very satisfying due to the organized structure of the honeycomb.

Persona summary

The main tasks are summarized as processing clients' invoices into the system and placing them in the right journals, which could also be seen as bookkeeping. Clara also matches bank statements, which is connected to the "banking" area.

Clara produces more clickstreams and unique clicks (1,5 times) on average than other persona's. This indicates that this user type is a **relatively active user**.

Main tasks



Group size





Analogy: parenting

When a baby cries, a parent has to act immediately. This is the same for Ben when a client calls with a problem (e.g. make sure someone makes a report). Besides, parents make sure kids have what they want. For Ben this is the same, because he likes his clients to stay with him.

Acquiring new clients

Taking in new clients, means more revenue for Ben's company. If his employees can work more efficiently, more clients can be acquired, which will make him happy. When a new client is taken in, he will make sure it is steered in the right direction. In such cases, he will check the administration.

Building relationships

For Ben it is important to let his clients stay with him, to keep his business running. To do so, he builds trust by keeping in contact with them, and immediately act upon their questions. Also, he pays attention to more highly valued clients.

Always in contact

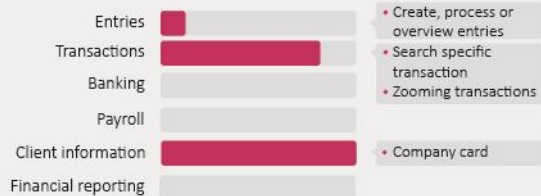
As a result Ben has frequent contact with clients, via phone, email or face to face. When a client calls, he tries to immediately answer and acts quickly. In such cases he can use Exact Online to look up specific information needed for understanding or answering the question.

“

Clients stay with us,
because they can count
on me.



Main tasks



Group size



Persona summary

Ben has a focus on clients, which is reflected in **searching specific client transactions**, and **checking the company card**. Furthermore, these users show low activity and work for less clients than average (13 clients). This indicates that Ben is a relatively inactive Exact Online user. The reason behind the low activity could be that Ben does not have a lot of intensive tasks to perform with EOL, these tasks are more related to "checking" specific parts. His tasks are performed outside the EOL domain too.

BEN • COMPANY OWNER



“
Processing payroll
became a commodity.
Special situations is what I
like.”

Experienced & specialized

Over the years, Bart specialized himself in performing tasks related to payroll. Processing payroll entries became a commodity and an easy task to do. As a result, he likes exceptions in his work, tackling uncommon situations makes him happy. Due to a lot of domain knowledge gained over the years, he is able to do so.

Different per employee

Bart deals with clients' employees and their salary, therefore he cannot afford any mistakes. If he does, employees will immediately notice and feel the burden. Besides, in his work, situations are never the same. Numbers differ per employee, therefore Bart has to come up with a customized solution for every employee of a client.

Clients calling

In the busy periods of a month (12th till 25th), Bart is busy with the payroll administration. Also, clients call often with questions or requests, which makes this period even more busy.



Analogy: flying an airplane

When flying in the air, the same procedures will be followed every time, which is not very exiting. Over time it becomes natural, the excitement lies in special unforeseen situations (e.g. weather). This is the same for Bart, he likes to tackle special situations. Besides, pilots have the duty to transport passengers safely, no mistakes can be made. In Bart's case he will not risk any lives, but people will feel the burden when mistakes are made.

Persona summary

Bart **processes payroll entries**, and performs tasks similar to a payroll administrator, which could be looking at and changing **information about a specific user** or perform **payroll declarations**. Bart is working for on average 59 clients, which is a lot more than average. Besides, this user type shows a higher mean activity over time, and performs more unique clicks than average. This means Bart is doing a variety of tasks for a lot of clients, which indicates he is using Exact Online extensively.

Main tasks

Entries	
Transactions	
Banking	
Payroll	
Client information	
Financial reporting	

- Import payroll entries
- VAT for payroll
- Employee section

Group size



BART • PAYROLL ADMINISTRATOR



= exact

QUESTIONS?

= exact