KNOW YOUR USERS

User persona help us better understand and empathize with the real people who use our product - people like you!

At Salesforce, personas help us keep our users at the center of the design process. Our persona are research based to ensure that they truly reflect the people that use our products. Beyond title or role, our personas provide insight into users' work behaviors, motivations, goals, and the tools they use to get their jobs done.

We believe that when teams understand who they are building for and are versed in those users' needs and behaviors, then they can make better decisions about the products on their behalf.

USING THIS PERSONA PACK

Use these cards to help answer questions:

- What does my persona need to do first to get their job done?
- Which persona am I building or adding new features for?
- Given their activities, which features are a top priority for my persona?
- Which personas will be affected by the feature that I am building?

Consider telling Persona-based user stories:

> *As a Deal Closer I want to log all of my interactions with my customers so that I can follow-up and provide the information they need to make a purchasing decision.* 🍞

> *As a Pipeline Builder I need to quickly see who I should call next so that I can meet my daily activity quota.* 🍞

Service Admin
Manage Service Cloud instance

> *I get frustrated when I find certain things we custom built and now we cannot easily change them or take advantage of new Service features when they come out.*
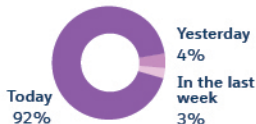
"

TOP ACTIVITIES

1. Modifying and administering Salesforce
2. Creating and viewing reports and dashboards
3. Creating users and accounts

66% spend 5+ hours/day in Salesforce

35% have 10+ yrs experience in customer support

LAST LOGIN

Yesterday 4%

Today 92%

In the last week 3%

FREQUENCY OF SERVICE INSTANCE MODIFICATION

24% daily

29% weekly

24% less than monthly

10% a few times/year

user research

Case Solver

Provide immediate customer support

Everything is in one place and EVERYTHING is measured. We NEVER experienced any downtime. Our Sales teams are also on Salesforce so the whole company can collaborate together.
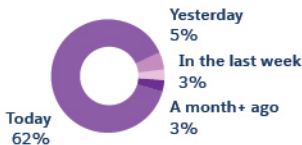
TOP ACTIVITIES

1. Logging activities
2. Troubleshooting customer issues
3. Updating existing customers

65% spend 5+ hours/day in Salesforce

42% have 10+ yrs experience in customer support

LAST LOGIN

Yesterday
5%

In the last week
3%

A month+ ago
3%

Today
62%

SUPPORT CHANNELS

88% use phone
87% use email
17% use live chat
7% use social media

user research

Emerging Personas

Employee Advocate
Interview, hire, and
train employees

Field Dispatcher
Troubleshoot customer issues
and schedule field technicians

Field Technician
Troubleshoot customer issues
onsite, repair, update cases

**These personas are works in progress.
You can help shape them!** Sign up for the
Salesforce Customer Research Program:

www.salesforce.com/ux/research

user research

Expert Agent

Solve escalated cases, manage Knowledge articles, train agents

Salesforce is a powerful tool for my day-to-day activities. I can quickly track and pull a report. Easy to access from a browser or iOS application. Never crashes and very secure.

TOP ACTIVITIES

1. Troubleshooting customer issues
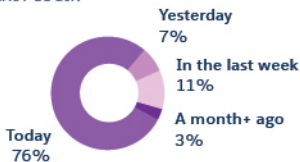2. Viewing status of cases
3. Logging activities

66% spend 5+ hours/day in Salesforce

28% have 10+ yrs experience in customer support

LAST LOGIN

Yesterday
7%

In the last week
11%

A month+ ago
3%

Today
76%

SUPPORT CHANNELS

58% use phone
59% use email
15% use live chat
7% use social media

user research

Team Leader

Supervise, manage, and train agents

> *It makes tracking customer support issues easy. It gives me the opportunity to track employee productivity.*
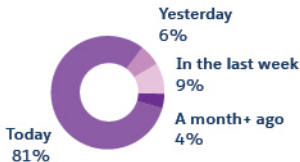
TOP ACTIVITIES

1. Viewing the status of specific cases
2. Creating and viewing reports and dashboards
3. Collaborating with colleagues to solve cases

36% spend 5+ hours/day in Salesforce

55% have 10+ yrs experience in customer support

LAST LOGIN

Yesterday
6%

In the last week
9%

A month+ ago
4%

Today
81%

DIRECT REPORTS

11% no reports
43% 1-10
22% 11-20
12% 21-50
12% 50+

user research