World Wide Technology

Make a new world happen

# Dynamic Persona Modeling

Enabling People | Empowering Business

Digital Workplace Experience Summit

October 2022

# Session Agenda: Dynamic Persona Models

- Use cases for workforce personas
- Standard Models and Stumbling blocks
- Dynamic Persona Models – strategic and data-driven
- Success Stories – WWT's clients and how they've used personas
- Monitoring your employees' digital experience: current tools and recommendations

# David Rosenblatt

## World Wide Technology

David brings 23+ years in the technology industry, aligning, defining, and implementing complex solutions and strategies for Fortune 500 clients, global enterprises, and US federal agencies.

At World Wide Technology (WWT), David focuses on data-driven and actionable Digital Workspace strategies that deliver tangible business benefits and improve the employee experience. He engages with executive leadership, technology product owners, and line of business leaders to deliver insight on industry trends, emerging technology, and strategic solutions capabilities.

David is a CCIE Emeritus and recipient of the Harold Langlois Award for academic excellence for his Masters in Management from Harvard HES in 2021.

# Personas exist because leadership recognize that employees are key to transformation

*The organization can only move as fast as the end users are empowered to change.  How do we* ***empower a diverse group of end users?***

1. Understanding the end user, their role in the organization, and their corresponding needs and requirements.

2. Ensuring the overall strategy accounts for their needs and requirements.

3. Creating a partnership and receiving their buy-in to the strategy.

People | Process | Technology

# Why Use Workforce Personas?

Push for customization, personalization

Consumer expectations brought to our day jobs

IT: be responsive and minimize tool sprawl

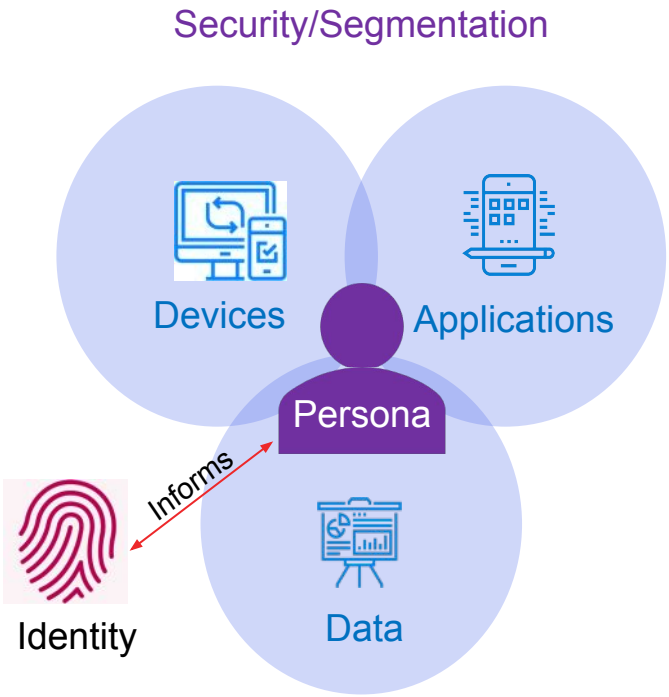
Size 9 shoe vs snowflake

> Or you have persona models, but dozens to hundreds of employees are the exception

# Evolution of Existing Persona Models – 2022

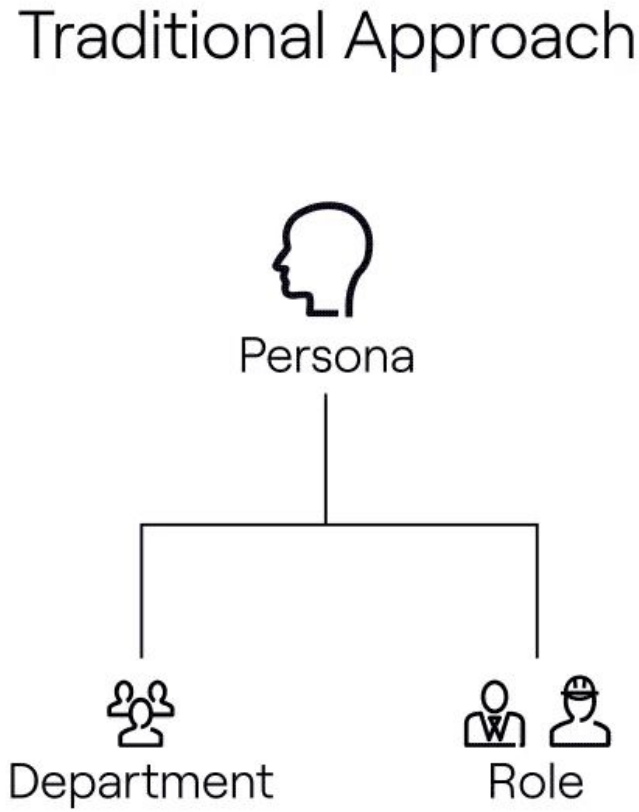
| Customer's Current Personas | Departmental/ Job Roles | Collaboration Workstyle | Occupancy Style |
|---|---|---|---|
| Executive Leadership | Human Resources | Individual contributor <30% collab. | Remote |
| Frontline, Field-based, Or Rugged | Information Technology | Primarily mobile >30% collab., from devices outside Customer estate | Hybrid <39% in Facility |
| Mobile | Finance | Team member >30% collab., primarily in-person | Hybrid 40%-70% in Facility |
| Design/ Engineering | Operations | Externally focused >40% collab., primarily virtual and with non-Ameren co-workers | Hybrid >70% in facility |
| Knowledge Workers | Facilities | Multi-team member >40% collab., +20% virtual | In Facilities |

## Holistic & Actionable Persona Refinement

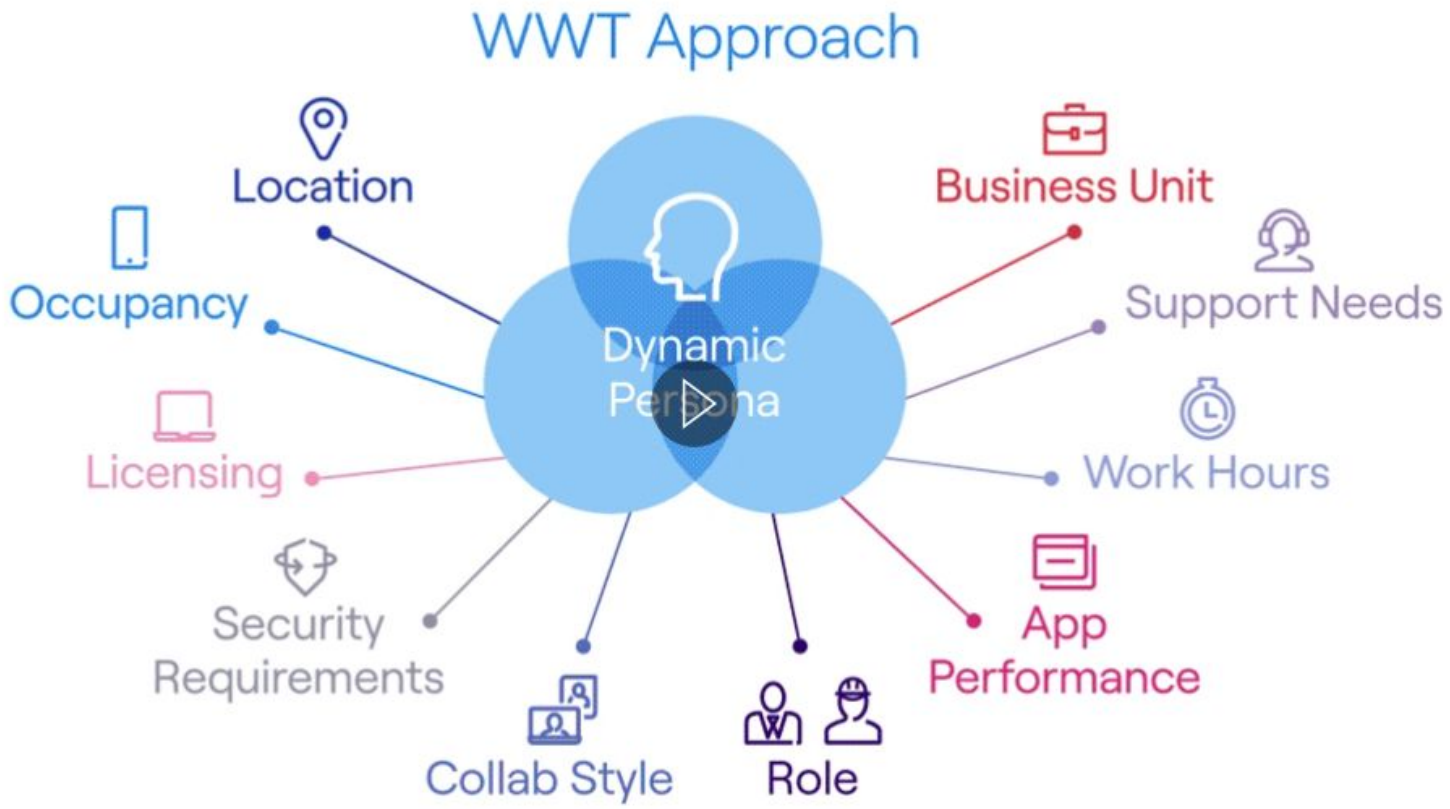


Persona Evolution and Refinement

# Traditional Personas vs Dynamic Persona Models



# Traditional Personas vs Dynamic Persona Models



# Dynamic Persona Modeling Journey Method

## DPM merges institutional knowledge with data

…allowing for strategy to be based in real-world evidence and business outcome requirements.

**Business + IT**
Align business and IT leaders; establish shared priorities, requirements, and interests

**Resource Mapping**
Merge data and institutional knowledge, mapping end users to business requirements and technical capabilities

**Recommendations**
Present an objective Business + IT recommendation, including roadmap and next steps

**Develop Engagement Structure**
Establish framework; people, principles, target attributes, and action plan

**Augment with Data**
Utilize datasets from multiple sources to validate assumptions and discover insights

**Analyze & Integrate**
Orchestration of business + IT feedback, datasets, and DPM mapping into holistic strategy

See WWT Dynamic Persona Methodology

# Data Gathering

Enterprises own more than enough data to begin building out a persona framework. Our process merges data gathering with institutional knowledge.

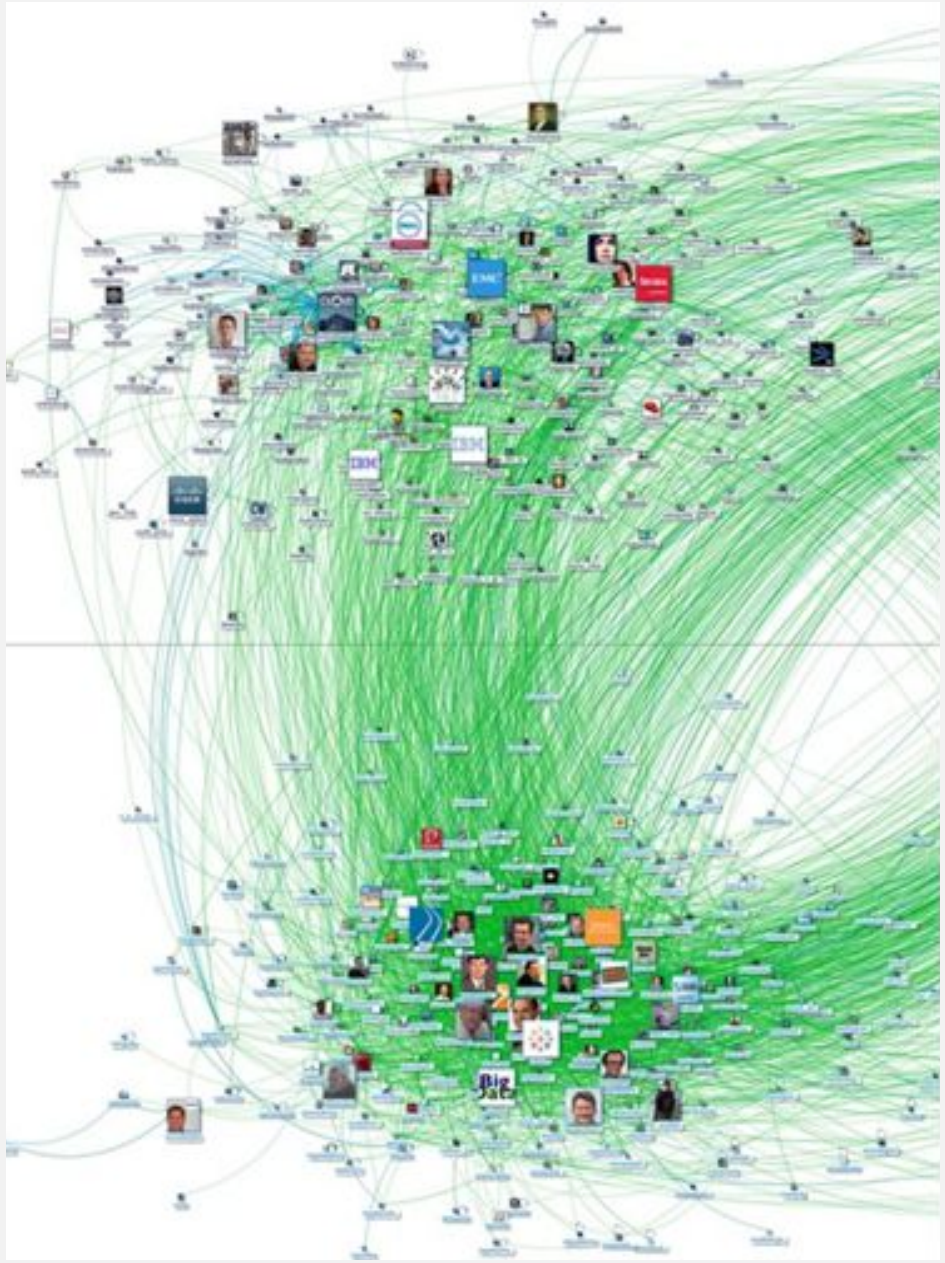
The goal is to build a data model against each end user.

## Examples of existing data sources:

- HR demographics data
- Identity and group membership
- Incident & service desk data
- Device Based data
- Application use Data
- Network information
- Collaboration Tools
- 3rd party enterprise tools

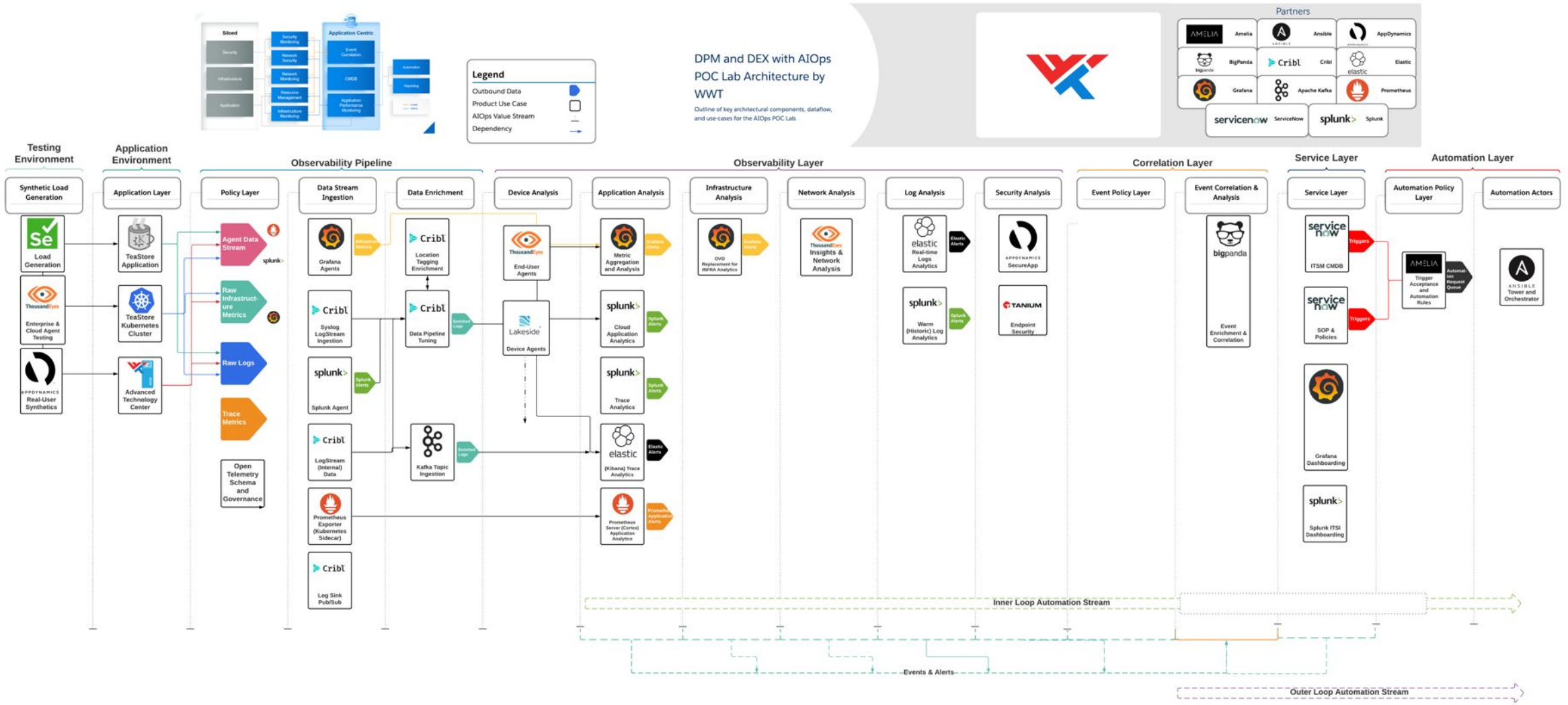
## Additional data is often required:

- End user surveys
- Management surveys
- Endpoint profiling monitoring & toolsets



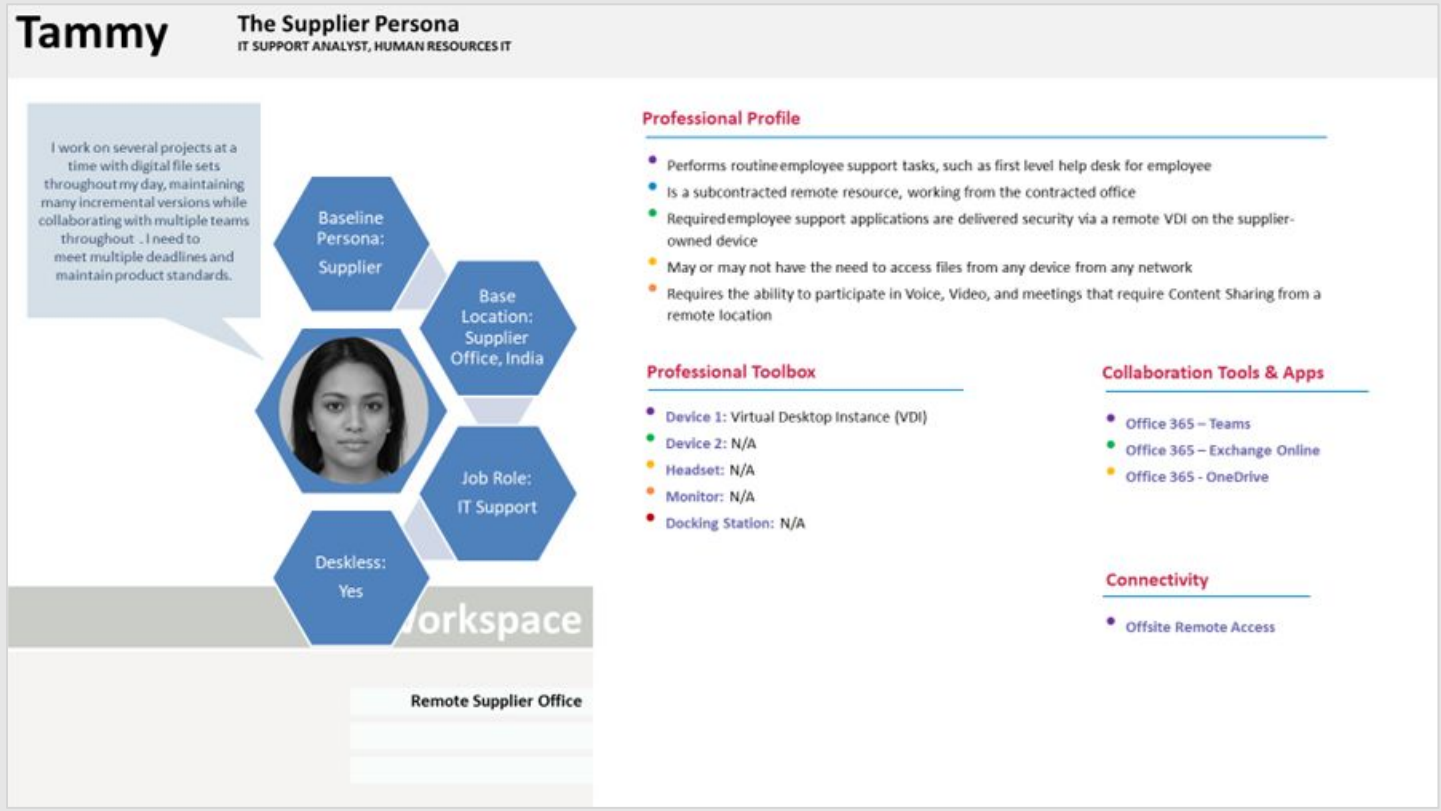
# Data Gathering

Data Ingestion, Filtering, and Correlation across Sources is a Critical step to Making Actionable and Dynamic Personas
It is also necessary for Closing the loop by tracking the Realtime impact of changes and enabling Automation



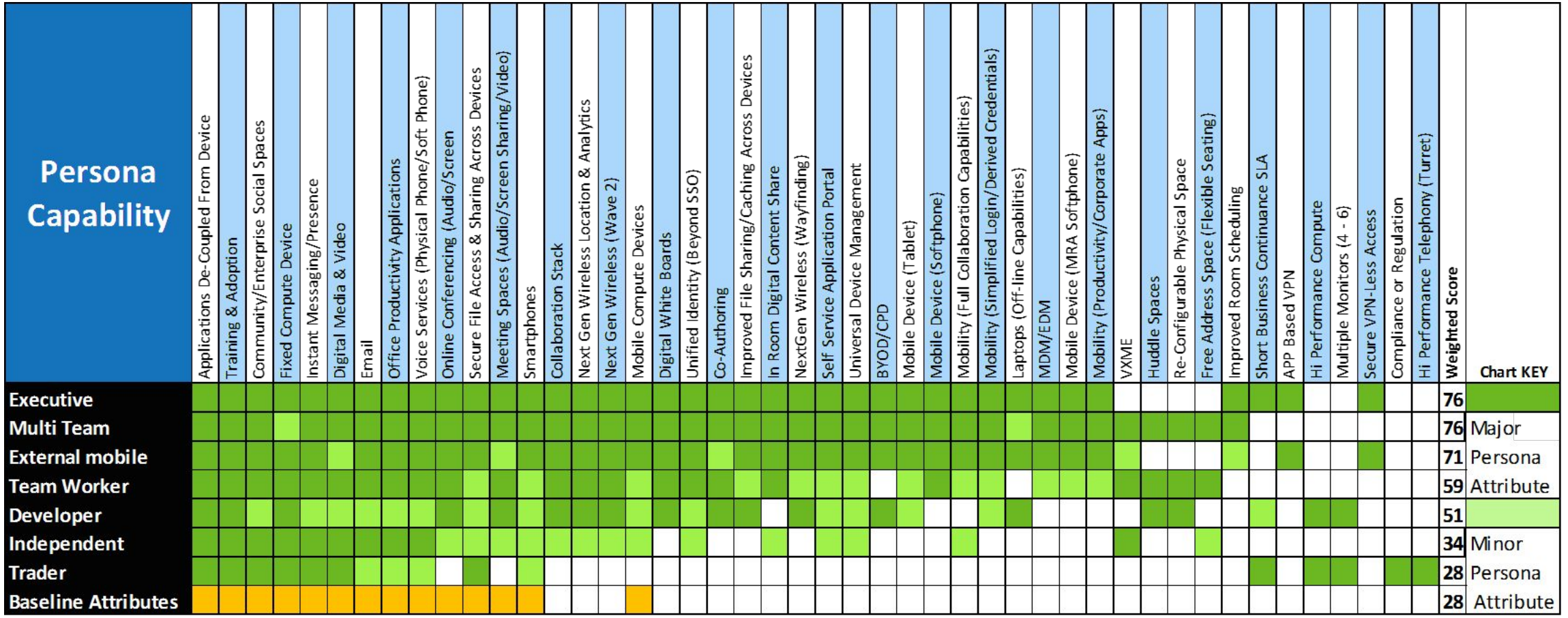
# Persona Based Approach

- Profile
- Tools
- Applications
- Team Membership
- Workstyles



# Mapping Future Personas to Capabilities

## Personas align user groups with enabled technology attributes to optimizes ROI

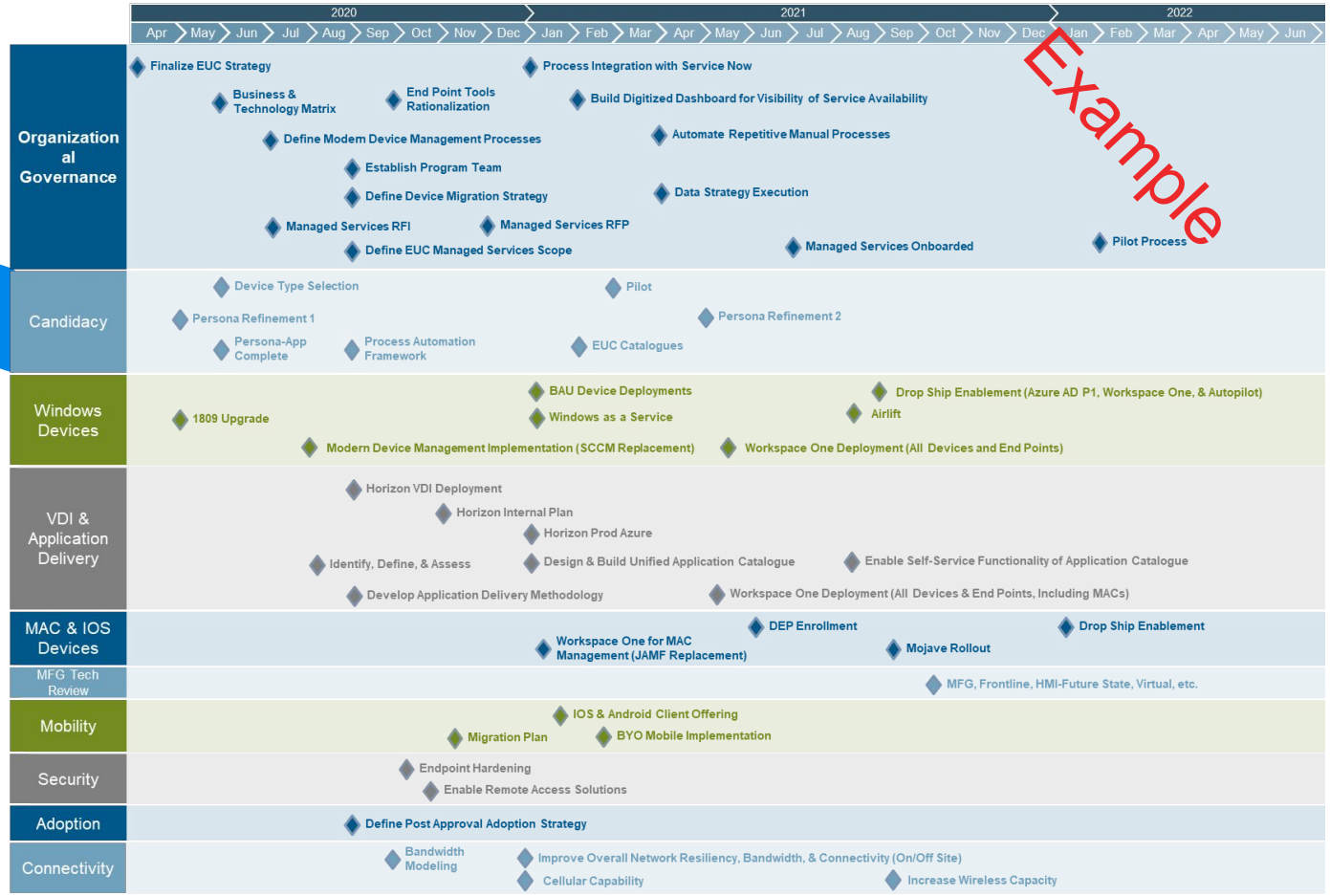


The Persona Framework helps us to align priorities across workstreams and technology Silos, Establish Candidacy, and Accelerates Transformation

## Persona Models are Leveraged to

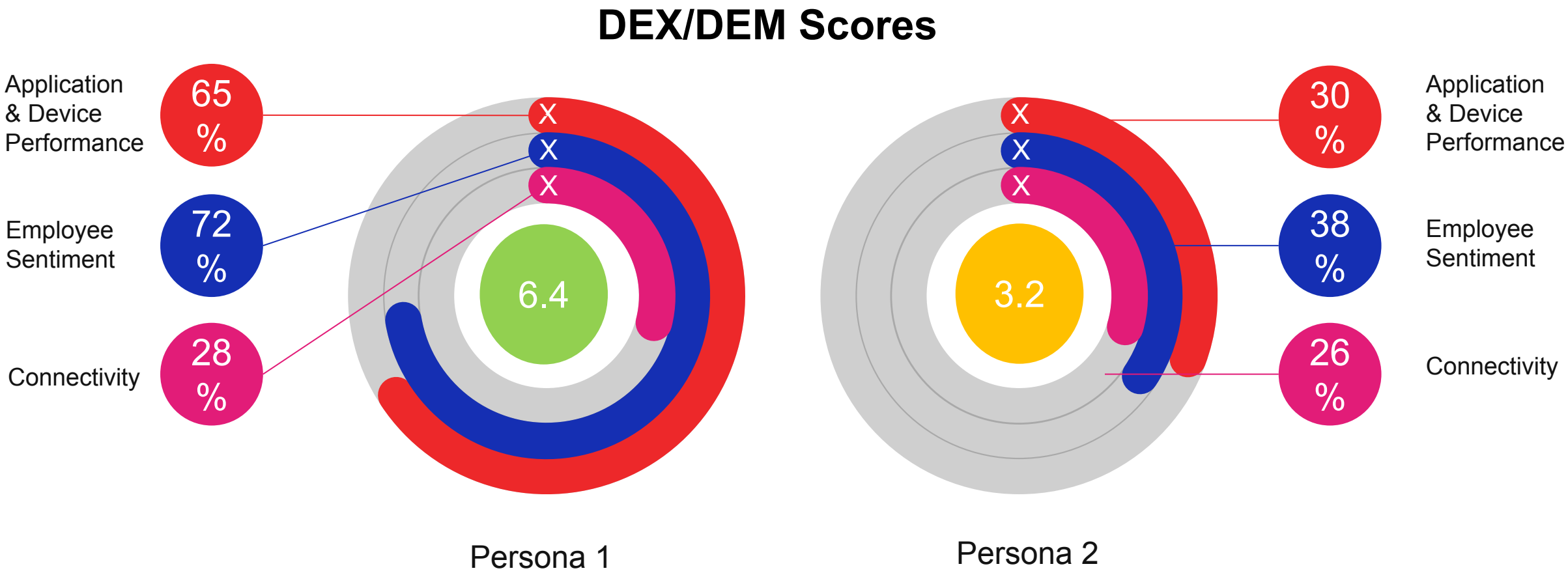
- Builds a business case
- Empowers decision points
- Informs transition strategies
- Help the Organization Prepare end users for a smooth transition
- Establishes end-user management framework
- Allows the business organization to maintain continuity and achieve outcomes

**Personas Help Us to Answer:**
What do different groups of end users need?
What are the prerequisites?
In what order do we Deliver these improvements?
Which users are ready for the transformation first?



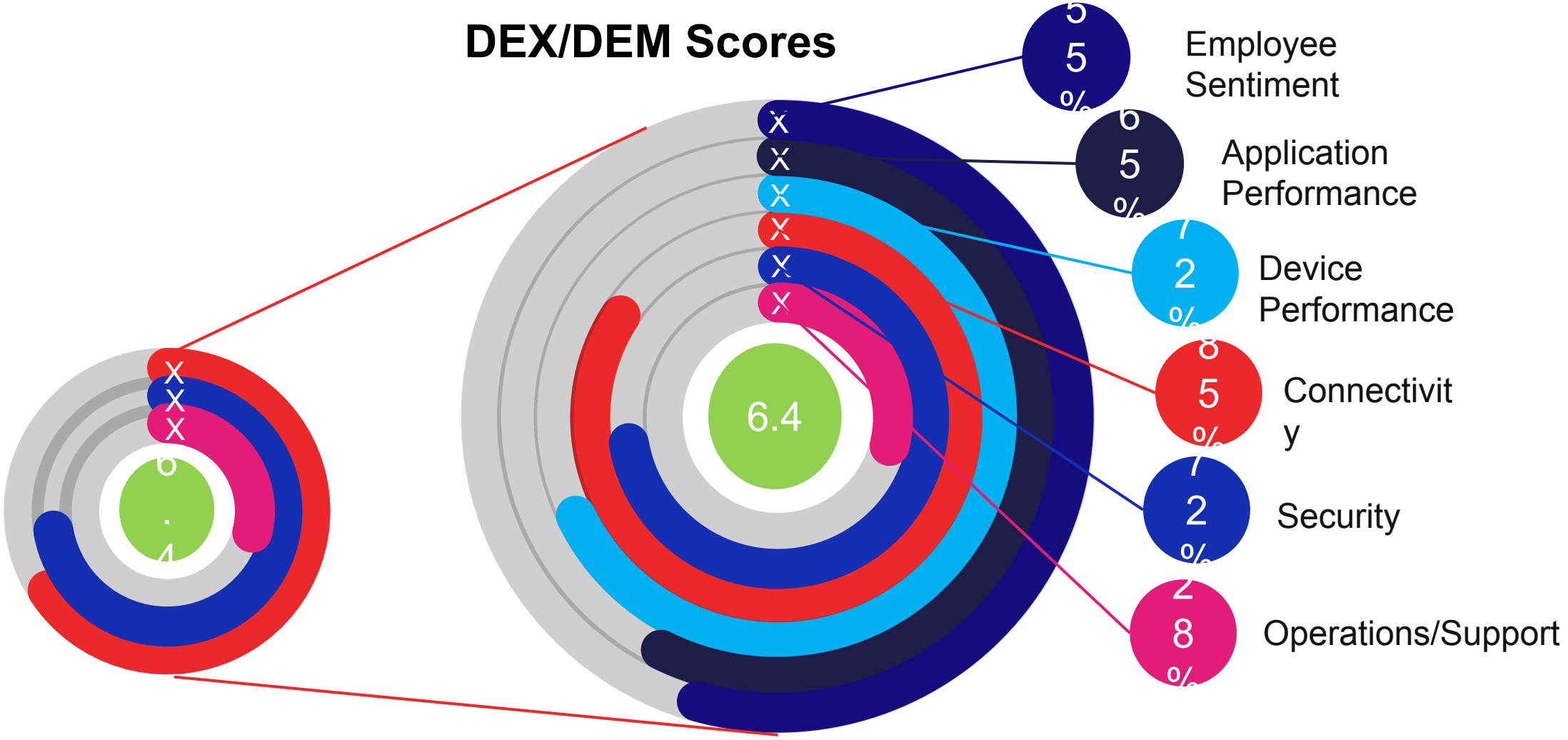
# Monitor the Employee Experience – DEM or DEX

Also known as **D**igital **E**mployee e**X**perience (DEX) or **D**igital **E**xperience **M**onitoring (DEM), ideally combines real-time analytics, employee sentiment data, and automated remediation that can be used to help organizations better engage, empower and delight people at work.



# Monitor the Employee Experience – DEM or DEX

Expanding on EUEM and Deciding on what Factors are important to you organization and how those components are going to be measured.



# DEM or DEX – Key Measures vary by Stakeholder

Reporting and Dashboards need to support varying perspectives on how value is delivered.

## End User

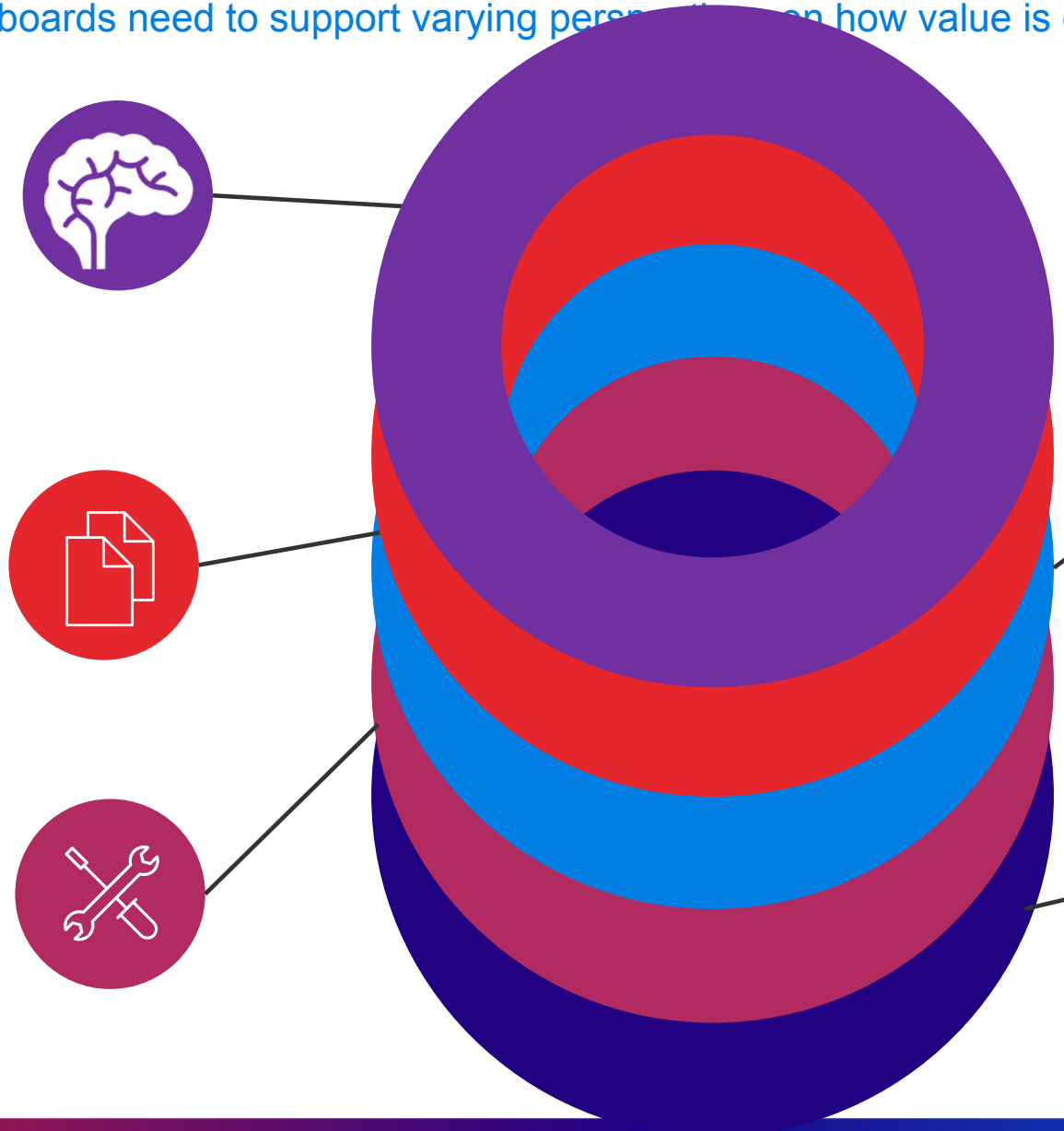
End user experience
Stable, performant access to applications
Support experience
Fear of change
Disruptive nature of change
Frequency of change

## EA & Governance

Continuous improvement Architectural Development,
Service usage, compatibility, and adoption
user trends
license consumption and Inventory planning

## IT

Application and hardware lifecycle management
Testing overhead
Support overhead
Application ownership
Remediation



## Management

Performance Metrics
Cost
Resource capacity
Ownership and accountability
Prioritization – impact to other activities

## Business

Productivity
Risk, Compliance & Security
Critical application availability
Stability
Performance
Vendor support
Agility

# WWT's Employee-Centric Approach

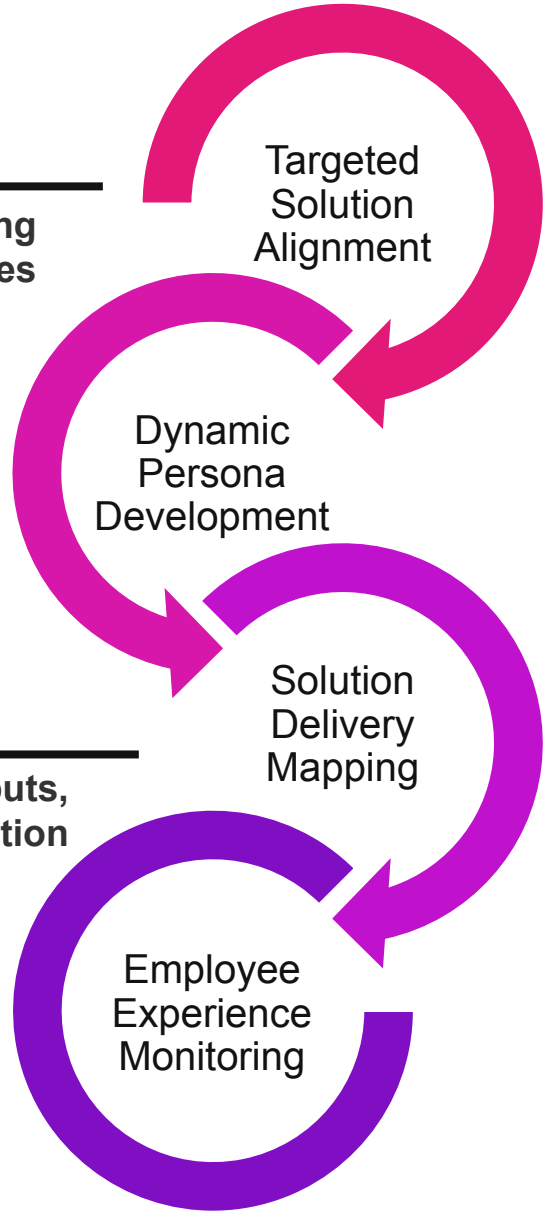
- Dynamic Persona Modeling builds a holistic framework that merges institutional knowledge with data.
- Start with Business, End User, and Technology Alignment.

**Alignment, Defining Required Outcomes**

**Interview, Ingest, Categorize, and Align**

**Actionable Outputs, Strategy, and Prioritization**

**Monitor and track the Positive Impact of Changes**



World Wide Technology

With $14B in annual revenue, WWT is a financially strong, privately held global technology solution provider.

Gartner
Top 20 Digital Business Consultant

TIME 100 MOST INFLUENTIAL COMPANIES 2021

# Digital Workspace strategy and solutions at WWT.com

Digital Workplace Strategy

Hybrid Work

End User Computing

Contact Center

Unified Communications

Meetings