



# USER PERSONAS PAINT PICTURES TO DRIVE BUSINESS DECISIONS

HOW THIS WORKED FOR  
SUNDANCE INSTITUTE  
AND BUNDLE



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# INTRODUCTION

User personas represent who will be interacting with your product or service. A user persona isn't restricted to the final consumer who purchases your product (that would be a buyer persona), but can be created for any role that will interact with your product or service along its journey. User personas are instrumental in creating [a strong user testing plan](#) or deciding how to lay out your [user interface \(UI\)](#).

Have you ever thought about how creating user personas and understanding their unique user journeys can contribute to important business decisions you need to make? Fully understanding users and their journey helps to create a final product that is streamlined, efficient, and easy to use - helping each user access the information and resources that are truly needed for where they are in their journey.

## DISCOVERING OPPORTUNITY FOR SUNDANCE INSTITUTE



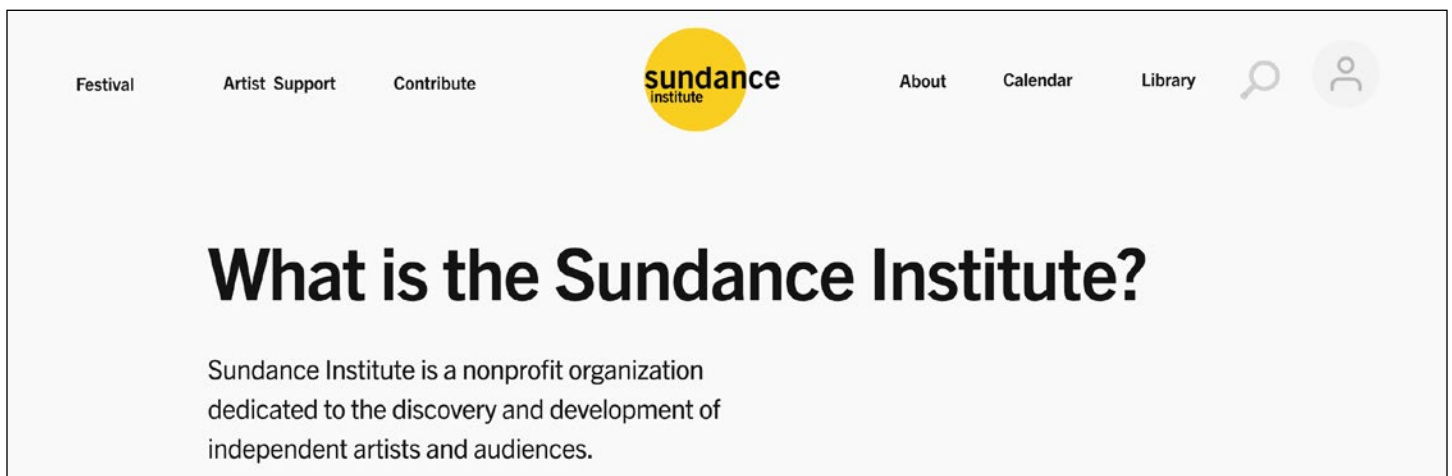
### INTRODUCTION

The Sundance Institute had a problem. They're home to one of the most well known film festivals in the world, the Sundance Film Festival, but few people seemed to know of their work beyond the film festival itself. They wanted to spread the word about all of the other amazing work that the Sundance Institute does for it's artists and the film industry, but struggled with communicating this to their audience.

They knew they needed to improve the usability of their website and provide a smooth interface for film lovers and festival attendees alike. It was also important that the website match the brand identity as the Sundance Institute (as compared

to the identity of the film festival alone), and also provide an engaging online experience in a world of over stimulation.

To help the Sundance Institute understand how to reach their goal, we knew that one of the most critical first steps would be to identify the various users who would be engaging with the website. Using information provided directly from the Sundance Institute in addition to some external research, 729 developed eight user personas that, on the whole, represented people who would be interacting with the Sundance Institute website in different capacities.

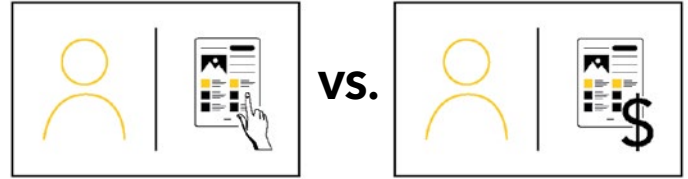


# USER VERSUS BUYER PERSONAS

Let's take a moment here to talk a bit more about the difference between user personas and buyer personas, and when one or the other might be more useful. For the Sundance Institute, the team specifically wanted to make user personas; that is a persona for any entity that would be engaging with their website. These weren't only the end user of their products, such as a festival attendee, but literally ANYONE who would interact with the website.

For the Sundance Institute that meant focusing not just on festival attendees (the "buyers"), but also on all of the other people who will interact with the site. These are entities who will USE the Sundance Institute's website, but won't necessarily be BUYING a product or service as a result of that use. Some of these users are looking for information (how to enter a film into a festival, where to

buy festival tickets, how to volunteer) while others might be looking to submit a request (submit a film, sponsor an event, request a press pass).



User persons focus specifically on how a particular user group will interact with the site - where were they before they came to the site, what are their goals when they are on the site, and where will they go after they leave the site. Focusing on these specifics allow us to understand how to best design a User Interface and create an experience that will meet their needs.

## DEFINING USER PERSONAS

The Sundance Institute had a good idea who many of their users were (artists and festival attendees), but they knew they were missing a subsection of their users. We used a unique two-fold approach to gathering data and information to further define their user personas.

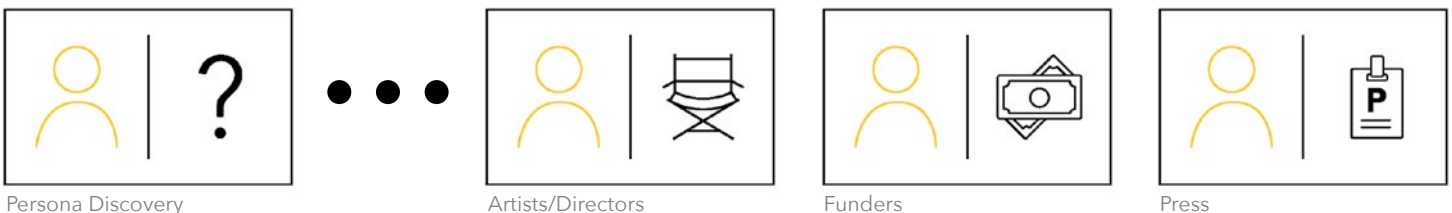
First, we started with traditional data points that the Sundance Institute already had from their regular business practices. This included their annual report, as well as the surveys and reports that were created after each Sundance Institute festival or event. Additional data was gathered using Google Analytics website engagement statistics. The Sundance Institute interviews their artists at important milestones, and these interviews were also reviewed and considered.

The second leg of data gathering focused on internal departments at the Sundance Institute.

Each department completed a [User Persona workshop with the 729 UI/UX team](#), which provided crucial information about the goals, hopes and pain points for a variety of internal stakeholders. This helped to ensure that the information and data used to define the user personas was fully representative of the Sundance Institute's broad audience, including donors, volunteers, festival locals, and industry representatives.

For the Sundance Institute, eight such user types were identified:

- Artists
- Funders
- Press
- Industry representatives
- Volunteers
- Utah locals
- Other festival attendees
- Internal Sundance staff



Persona Discovery

Artists/Directors

Funders

Press



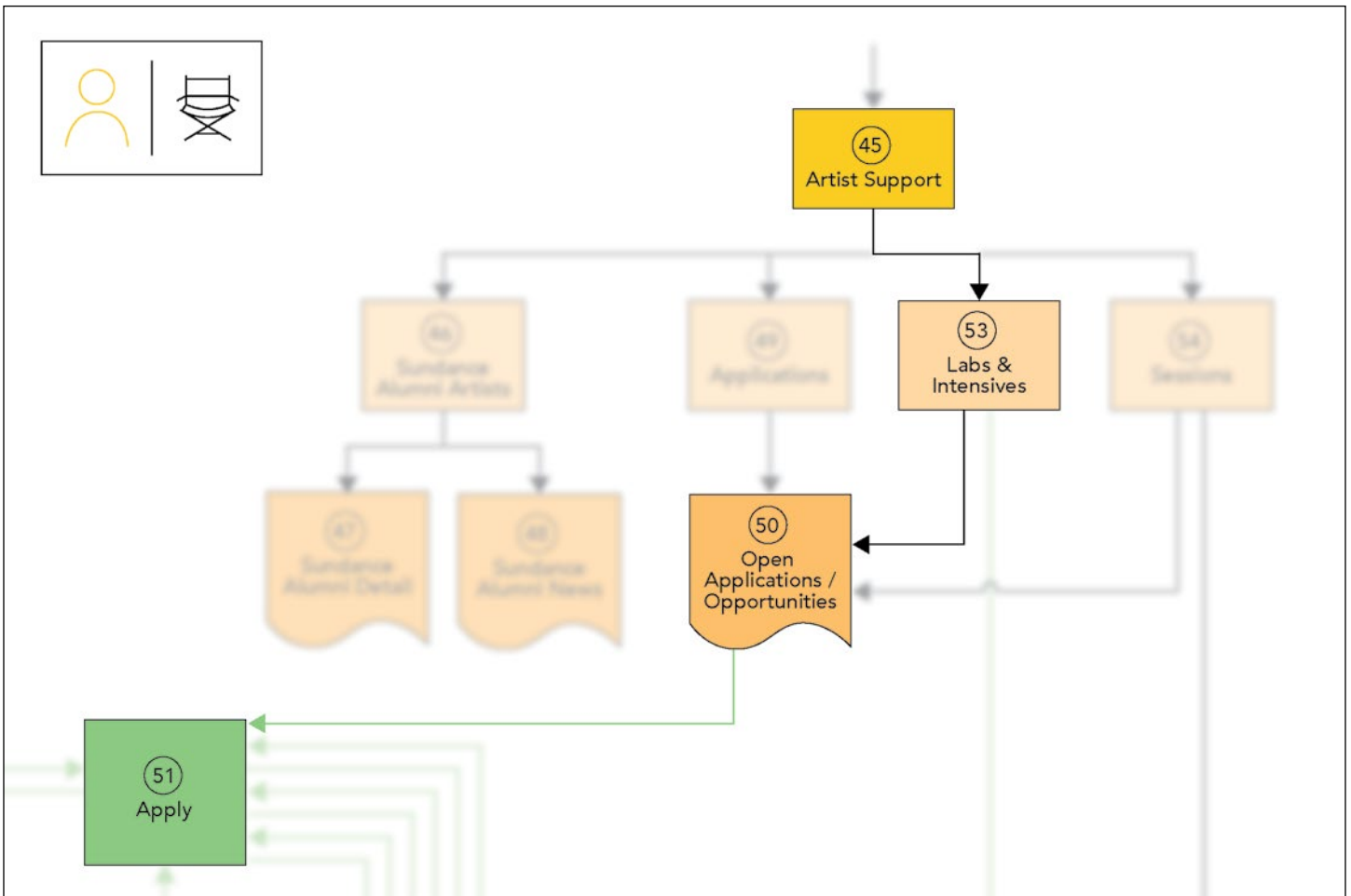
# TAKING THE USER PERSONAS THROUGH THEIR UNIQUE USER JOURNEYS

Once we had a strong grasp on who the user personas were, it was time to jump into their shoes and follow their **unique user journeys**. For each persona, it was important to fully understand how they fit into the Sundance Institute’s broader organizational chart and what their likely actions would be while engaging with the Sundance Institute’s website, festivals and other services.

For each persona that was identified, we started on the most likely page of the Sundance Institute’s

website that a user would enter on, based on analytics history. Their journey was hashed out from there. Each persona has different needs that was the driving force behind what links or buttons they clicked on the website.

For example, an aspiring artist might be looking for information on how to enter one of the Sundance Institute’s film festivals, while a donor might be looking for an easy way to make a contribution online.



User journey of an aspiring artist from entry to application

Spending this time on identifying and mapping out the user journeys is important to help each user have a frustration free experience with the Sundance Institute’s website, and ultimately with

their products and brand. Users want their experience to be smooth, seamless and straightforward; fleshing out their user journeys helps make this possible.

# CREATING WIREFRAMES AND MOCKUPS

Once the team had laid out the journey that each user persona might take it was time to start creating **wireframes and mockups** for the various web pages, forms, and calls-to-action that were needed. Since we had clearly identified not only who would be using the website, but also how they would use it, the wireframe creation process was both straightforward and speedy.



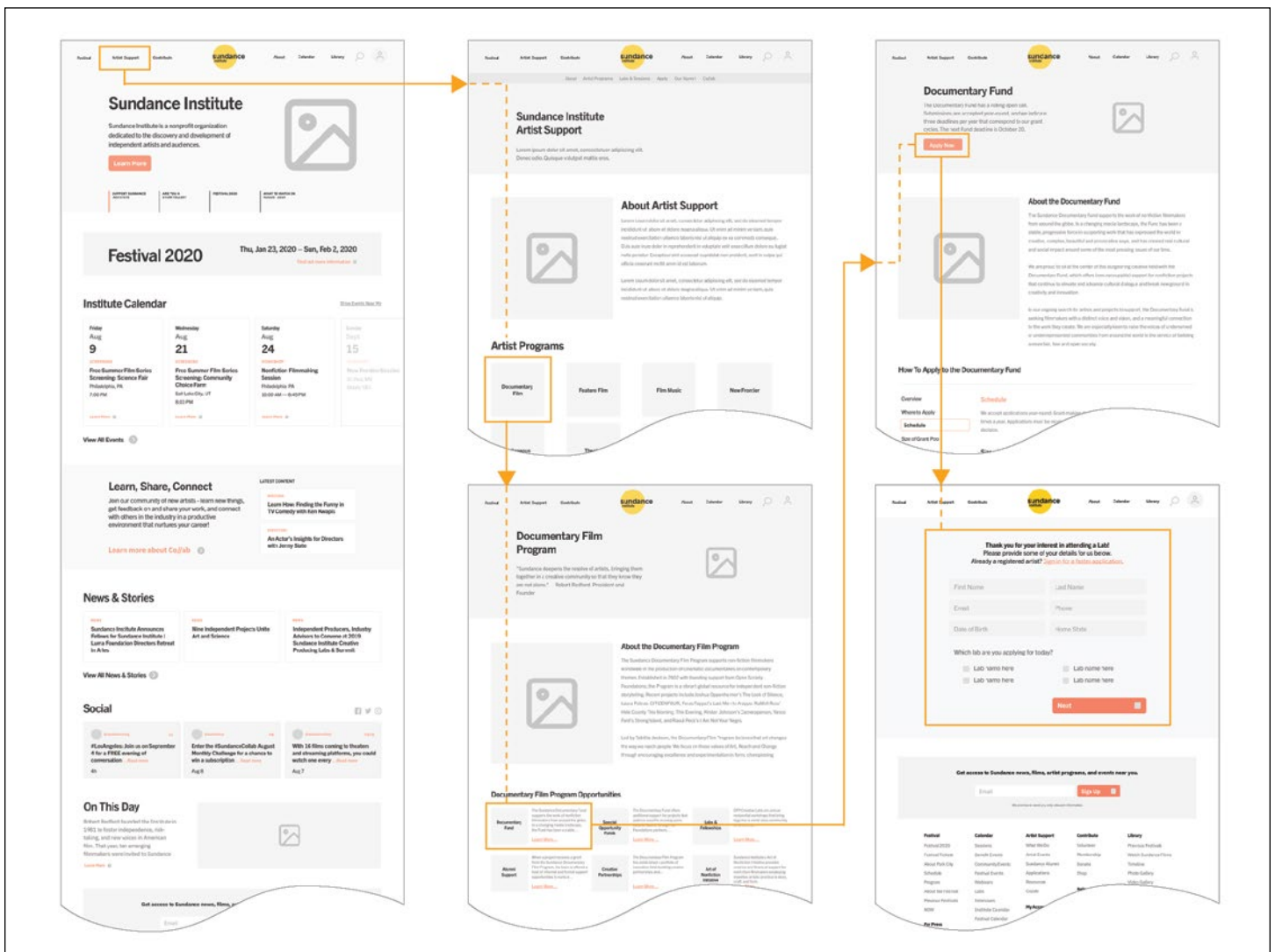
The UI/UX team not only knew what each wireframe should be, they also knew what

wireframes they didn't need. No time was wasted on creating wireframes and mockups that would ultimately be discarded as they had already identi-

fied how a person would move throughout the Sundance Institute's website.

In addition to improved efficiency, the team worked with the confidence that the user persona and user journey mapping meant they were dialed in to specific needs that any particular group of users might have.

For example, knowing that potential donors and potential artists would interact with the website differently, taking two different user journeys, specific wireframes were created for each group. Additionally, superfluous text that didn't apply to a specific user persona was eliminated and the whole process was streamlined leading to an improved user experience.



Wire frames based on the artist user journey from the home page to application.

# REVEALING THE FINAL WEBSITE

The final website for the Sundance Institute is supercharged to emphasize the user experience and user journey. 729 Solution’s web design team took the site to an entirely new level of usability

and engagement; users now had a clear path through the site that was tailored for their needs and kept them focused on their purpose for being there.

## BUSINESS DECISIONS INFLUENCED BY THE DISCOVERY PROCESS

### 1 ASPIRING ARTISTS

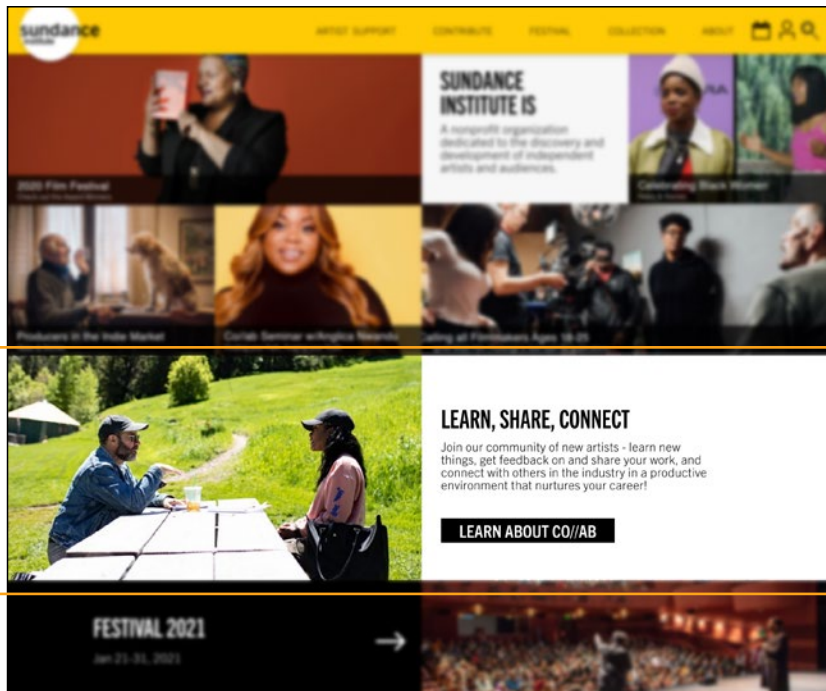
Aspiring artists frequently go to the Sundance’s Institute website looking for information on how to enter one of their festivals. At this point, they’re typically quite hungry for information and will spend significant time exploring the website in their quest to learn more and dream of their future success as a filmmaker.

As 729’s UI/UX team talked through the aspiring artist persona with the Sundance Institute, they discovered that these aspiring

artists really were taking a deep dive into the Sundance website. The main places they were visiting were general information pages, the Sundance Institute’s blog, and pages about specific programs and events. Additionally, they were seeking connections with other aspiring artists through the online connection and collaboration portal ([Co//ab](#)).

Using this information, we suggested that the Sundance Institute really focus their language in these various online locations to spread the message

that they are more than just a film festival. They added information and links to their blog, connection portal and general information pages so that when an aspiring artist visited one of those pages, they would also see and hopefully click on the additional information, in turn learning more about the Sundance Institute as a whole. Only by understanding the full user journey that an aspiring artist would take when visiting their website were they able to dial in their messaging to specifically expand a users understanding of what the Institute is.



Sundance Institute Home Page

# BUSINESS DECISIONS INFLUENCED BY THE DISCOVERY PROCESS (CONTINUED)

## 2 CORPORATE SPONSORS

The Sundance Institute is in part supported by their corporate sponsors. These companies, both large and small, are looking to exchange their support for visibility to other users of the Sundance Institute's services and products, most often through their film festivals. However, film festivals are not the only way that a corporate sponsor can work

with the Sundance Institute. As such, they wanted to focus on educating their sponsors about all of the other programs and events in their portfolio.

While working on the user persona for corporate sponsors it became clear to us that there were certain pages on the Sundance Institute's website where they would go for information. These pages were drastically different from the pages visited by their other personas (such as aspiring artists or festival attendees).

Corporate sponsors (both existing and potential) visited pages that gave background information (the about us page), event and program information, and information about specific up-and-coming artists. They were not visiting pages with information on submitting a film or attending a festival, but instead focused on learning more about the background of the Sundance Institute to ensure the institute's mission came into alignment with their own.

The user persona workshop and the user journey meant that it was clear which pages the corporate sponsors were visiting, so they knew where they should direct their marketing efforts. They added information about the other activities of the Sundance Institute to each of the pages that the corporate sponsor persona was likely to view, thus increasing the possibility that they would learn more about the depth of the Sundance Institute's events, programs and services. Because they knew exactly where these corporate sponsors would go, they knew which pages to place their marketing messaging on.



Sundance Institute Contribute Page



# BUSINESS DECISIONS INFLUENCED BY THE DISCOVERY PROCESS (CONTINUED)

## 3 FESTIVAL ATTENDEES

Festival attendees are obviously one of the Sundance Institute's largest audiences. These attendees are often devoted to the art of film, and love learning more about their favorite artists and their works. The festival attendees are also a captive audience since they will be watching a film (either in person or online in), leading to easy oppor-

tunities to insert a brief marketing message before or after the cinematic presentation.

Additionally, festival attendees have the greatest likelihood of overlapping with other user personas. The attendees are most likely to also contribute as a donor, enter their own film into a festival, or volunteer to help at an event. However, they often don't fully realize the programs and services offered by the Sundance Institute beyond the film festivals.

Using this information, our team helped the Sundance Institute create spaces for clear messaging that could be shown to the festival attendees throughout the ticket purchasing and fulfillment process, that would help attendees connect with the other programs the Institute offers. We assured the marketing team that the messaging would not need to have a "marketing" feel to it, as they were just providing useful information to people who have already bought in on the value of the Sundance brand. You could be straightforward and to the point with these users, getting your message across quickly and easily.

Festival attendees were hungry for more information about the Sundance Institute, having already fallen in love with the film festivals, and were excited to learn about more ways to engage.

	INDIVIDUAL TICKETS	PASSES	PACKAGES
<b>INCLUDES</b>	STARTING AT \$65	STARTING AT \$200	STARTING AT \$700
Access Screenings	✓	✓	✓
Access Off-Screen Events		✓	✓
Priority Entrance			✓
Valid During The Entire Festival			✓
	ON SALE NOW	LEARN MORE	LEARN MORE

**ABOUT THE TICKETING PROCESS**

1. **DECIDE WHAT TYPE OF TICKET IS BEST FOR YOU BY NAVIGATING THROUGH OUR HANDY TICKET WIZARD AT [TICKET WIZARD](#).**
2. **BUY YOUR TICKETS! CHECKOUT RIGHT AWAY. YOUR CARD EXPIRES AFTER 15 MINUTES AND IF THAT HAPPENS, YOU'LL HAVE TO START OVER.**
3. **WAIT PATIENTLY UNTIL YOUR TICKET SELECTION WINDOW OPENS IN THE MEANTIME. BROWSE THE TICKET PROGRAM AND BOOKMARK THE FILMS YOU WANT TO SEE.**
4. **ARRIVE AT THE FEST AND SHOW US THE TICKETS WHEN YOU GET TO THE DOOR WITH THE [ON-SITE CHECKOUT WIZARD](#).**

**PROGRAM**

FILMS | NEW FRONTIER | OFFSCREEN

Sundance Institute Tickets/Passes Page

# DISCOVERING THE UNEXPECTED FOR BUNDLE



## INTRODUCTION

Bundle came to 729 Solutions with a new business concept that they needed help taking from idea to reality. Bundle knew that buying a home was a huge goal for many people, but that often the act of securing funding and undertaking a mortgage was confusing and overwhelming. For first time home buyers who had never obtained a mort-

gage before the entire process can feel disjointed and perplexing; they know it's a serious and important process, but struggle to understand how it all really works. Bundle's product focuses on creating clarity and transparency in the mortgage purchasing process, while protecting users' concerns for privacy and information security.

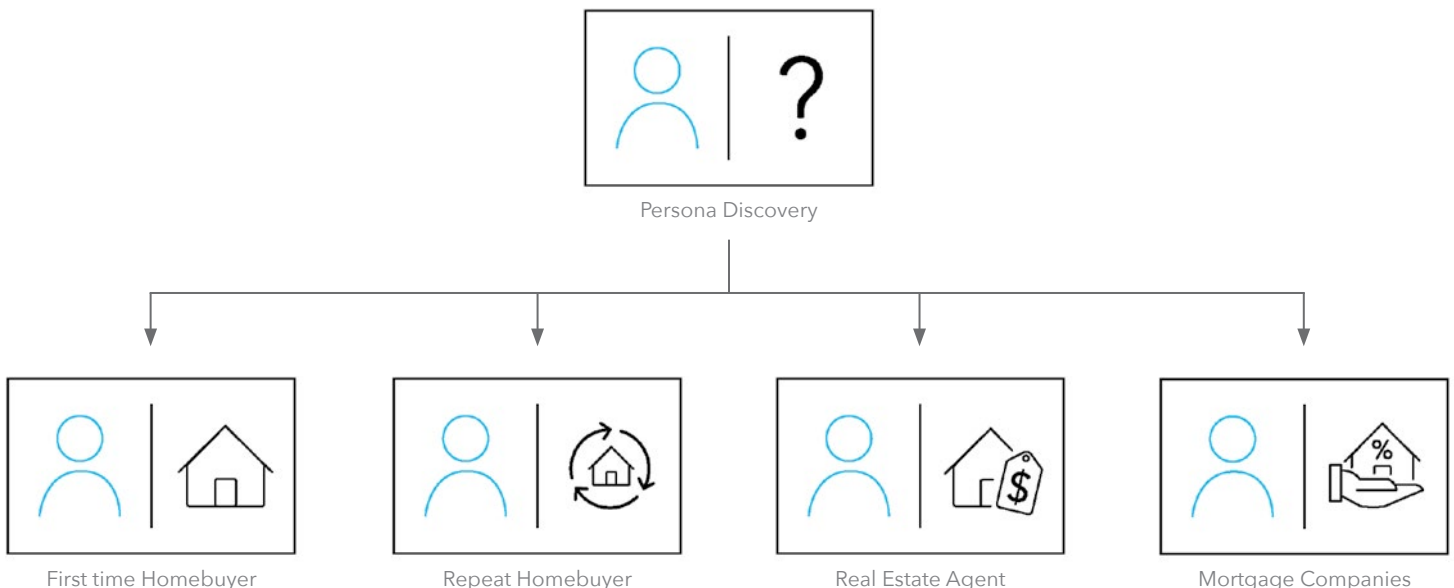
## DEFINING USER PERSONAS

Bundle began the [user persona process](#) with the presumption that they only had one or two different personas. As we started the deep dive into understanding their services, however, additional user personas became clear.

As a mortgage solution product, it was clear that a "homebuyer" was the prominent user persona from the get go. Homebuyers are the ones who are gathering information about the mortgage process and entering their own personal information to determine what mortgage options are available to them. As the team worked, however,

the differences between a first time homebuyer and a repeat homebuyer began to emerge.

For Bundle, the team also identified separate user personas in the real estate agents and the mortgage companies that would be engaging with the product from the professional side. While these entities are clearly well versed in how the mortgage process works, it was still important to begin thinking about what their unique needs are and how these needs could be met through a tailored experience that Bundle would later offer.

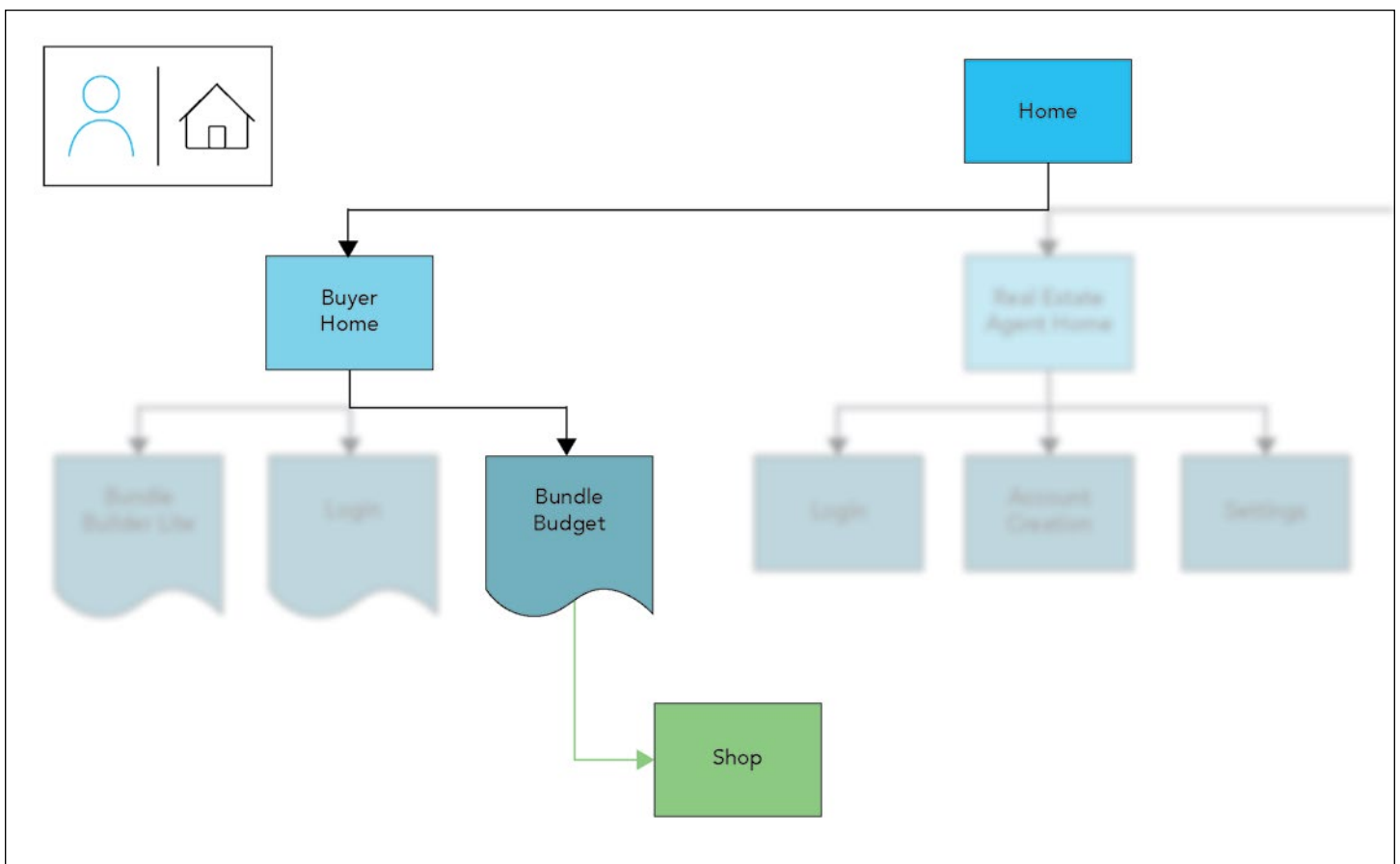


# EXPLORING THE USER JOURNEY

Once the user personas were identified it was time to begin exploring [the user journey](#). The information that was uncovered during the user persona generation process became critical in thinking about how potential users would be navigating the website.

Where Bundle had started with a single persona for homebuyers, splitting that out into first time and repeat homebuyers allowed us to tailor their journey even more specifically. For a repeat homebuyer, they might prefer to hover or click over

terms to get a reminder about definitions and concepts. They know the basics, and adding simple hints gave them the option for more information without cluttering their main screens. For new homebuyers, the team knew they might prefer to get more information upfront, without having to hover or click. As such, the user journey through Bundle's mortgage solution process would look different for each person, despite them both being homebuyers.



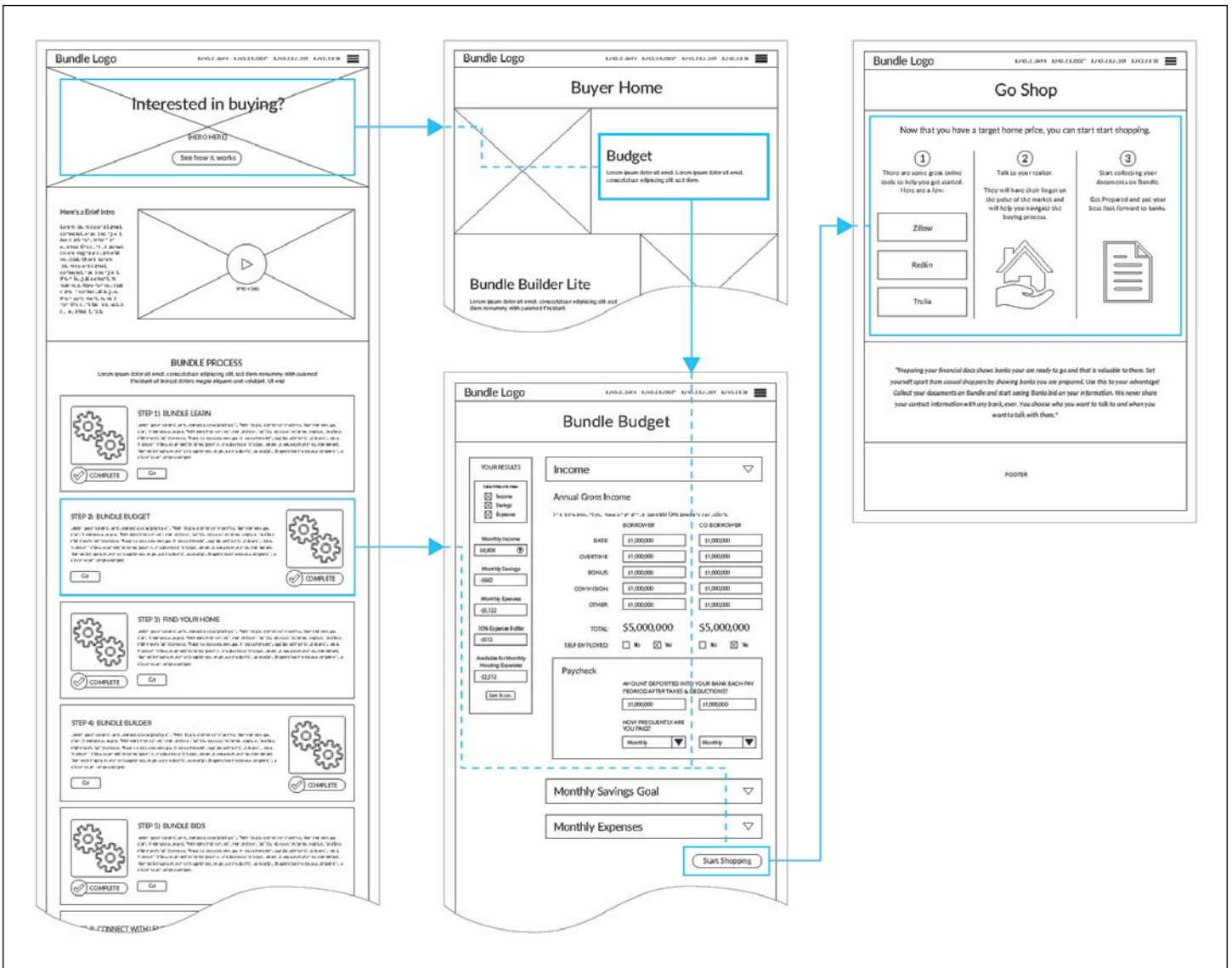
User journey of a 1st time home buyer from entry to shop for a mortgage

# DEVELOPING WIREFRAMES AND MOCKUPS

Once the user journeys were mapped out it was time to begin the process of making [wireframes and mockups](#). Again, the information discovered during the user persona process was critical to making sure unique needs were being met.

Since the mortgage process involves lots of numbers and complicated calculations, it was important that the wireframes demonstrated how infor-

mation would be presented in a clear and succinct format. Our team was able to tailor each set of wireframes for the specific user personas, making sure people saw the information that was relevant to their situation without being overwhelmed by too much information that they didn't need at that point in time.



Wireframes based on user journey of a 1st time home buyer from entry to shop for a mortgage



# THE FINAL PRODUCT

Bundle was a big project with lots of complicated calculations and intricacies that form the backbone of the home buying process in the United States. Additionally, working with financial information and personal details mean that data security was a top priority: no one wants their personal financial information stolen or used in a harmful way.

Creating and utilizing user personas meant that Bundle could address the concerns of their various

constituents (buyers, lenders, brokers) with pin-point precision. When you come to the website it is easy to self identify as to which category you are in and then click to follow the very clear path that has been set out for your needs. Users see only the information that is pertinent to them based on what user journey they are on; buyers don't see information specific to mortgage brokers and vice versa

## BUSINESS DECISIONS BUNDLE MADE BASED ON THE DISCOVERY PROCESS

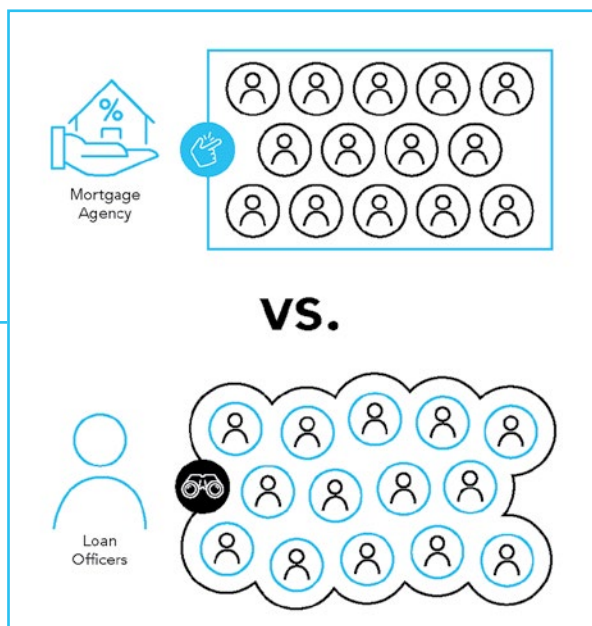
### 1 MORTGAGE AGENCIES

The founder of Bundle had an extensive background within the mortgage industry. He understood how the mortgage process worked from start to finish, and knew how to explain the complex financial and regulatory information that envelops the mortgage process. When he came to 729 Solutions, he had already put significant time into thinking about who his users were, and how they would use the new service (Bundle) that he was creating.

When we began working through the user persona process with Bundle, they started with the personas that were easily identifiable: a homebuyer, a real estate agent and a mortgage loan officer. As they talked through each persona, and discussed what that hypothetical person would be looking for, a new and unexpected persona emerged: the mortgage agency.

Originally, the Bundle business model focused on helping individual home buyers and their real estate agents connect with individual mortgage loan officers. Each loan officer (and each buyer and real estate agent) would have their own unique Bundle login and information. Then the Bundle team realized there was an entire group that they'd originally missed when thinking about possible users; the mortgage agency!

Many mortgage loan officers work within the context of a larger agency. While the officer is the one working directly with home owners and realtors, they're doing so under the larger umbrella of the agency. By making the mortgage agency their own entity as a user persona, Bundle had to further think about how they could market their product to an agency as a whole, and how the user journey might change when navigating through an agency portal.



Targeting mortgage agencies is easier than loan officers

# BUSINESS DECISIONS BUNDLE MADE BASED ON THE DISCOVERY PROCESS (CONTINUED)

## 1 MORTGAGE AGENCIES (CONTINUED)

Identifying the mortgage agency itself as a separate user persona opened up an additional avenue of revenue for Bundle. Bundle was able to market to them specifically, and with a more efficient marketing strategy. By focusing on the agency, Bundle could demonstrate that instead of having to attract 30 separate loan officers, working with an agency would automatically attract all loan officers within that agency. This meant Bundle could have more of an impact with less marketing efforts.

While they can (and do) still promote themselves to individual mortgage loan officers, they also promote themselves directly to

multi-person agencies. Since they mapped out what a mortgage agency would need and how they would navigate the Bundle website, they were well prepared to answer any questions and remove any barriers to using their mortgage solution product.

This new persona of a mortgage agency felt like a big step forward in terms of how Bundle could imagine their future success. Mortgage agencies could register all of their loan officers, manage their information and remove them as needed. Registering loan officers also gives the potential to increase their reach to clients, as loan officers refer their clients to Bundle as a resource for information about the loan buying process.

## 2 FIRST TIME VERSUS REPEAT HOMEBUYERS

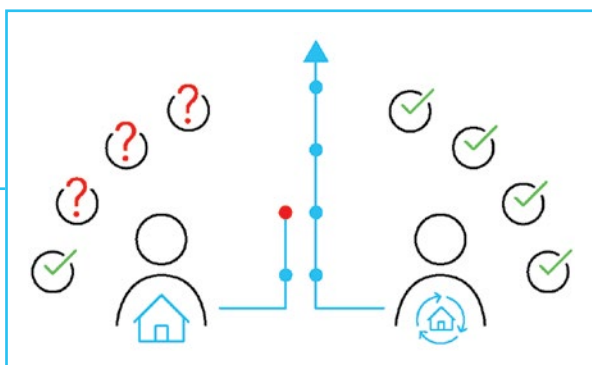
Bundle's second discovery came while working on one of the user personas that was originally identified; the homebuyer. The homebuyer is the most obvious user persona when looking at the mortgage loan process. The homebuyer is responsible for entering all of their personal and financial information correctly, and bears the ultimate responsibility for repayment of the mortgage loan on their new home.

Along with the team at Bundle, we drew on their own experiences with the home buying process (along with other data and

research) to help guide both the user persona and the user journey discovery processes. What came to light is that not every homebuyer is the same, and their needs may vary drastically from one person to another.

First time homebuyers might be at a completely different stage of life and have little experience making large purchases that require complicated financial calculations and decisions. There are many new terms and concepts for them to learn that they've likely never encountered before. They need more detailed information, as well as having the information presented to them in a straightforward manner.

When they begin the process of buying a home, the first time homebuyer likely has little understanding of the mortgage loan application process. They know it's complicated, and might even be a little fearful of making a mistake during this complex legal and financial process. This first time homebuyer is going to need more in depth information right from the start. They will have questions about the timeline of the mortgage process, the definitions used by their realtor or mortgage



1st time vs. repeat homebuyer

# BUSINESS DECISIONS BUNDLE MADE BASED ON THE DISCOVERY PROCESS (CONTINUED)

## 2 FIRST TIME VERSUS REPEAT HOMEBUYERS (CONTINUED)

officer, and concerns about the security of their financial data. They come from a place of knowing nothing about the home buying process, which means Bundle has an opportunity to educate and guide them.

In contrast, a repeat homebuyer is likely to have different needs. Having purchased a home before, they're already familiar with the basics of the timeline, process, and paperwork needed to secure their mortgage. They don't require the same level of support, and in fact might become frustrated if basic information that they already know is forced on them. Instead, they want to choose what information they get a refresher course on and what information they know well enough to skip.

For the repeat homebuyer, the user journey might flow at a quicker pace, with in-depth information available, but not visible, using hover or drop-down UI elements, for example. This way the user can access additional helpful information if they want it, but it's not an impediment to their navigating the website and entering their information quickly.

This small tweak of separating first time from repeat homebuyers resulted in the creation of two distinct user personas. While they're both working towards the same end goal of purchasing a home, the process by which they get there will be different. Armed with this information, Bundle set up their website in a way that allows each persona to get the information that is most useful to them, and to skip information that they don't need

## CONCLUSION

Many companies attempt to create user personas as a matter of course when they're first developing their website. They know it's important to understand who is using their website and how those people identify. However, often companies won't take this information to the next level by utilizing their user persona knowledge to help shape business decisions.

729 Solution's UI/UX team has years of experience helping companies make connections between the user personas, user journeys and business de-

isions. These two examples highlight how each company, The Sundance Institute and Bundle, developed their user personas and then used this information to make business decisions. By following this process, and by working with a strong UI/UX team, each company was able to improve their website and services, laser focus their messaging and where it appeared and ensured that each user was having a premium experience tailored to their specific needs.



Reach out to our Creative Director if you have any questions, or if you found this to be useful. We love getting feedback!

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