

## CSIO.com – User Personas

### ABOUT PERSONAS

Personas are documents that describe typical target users. They paint a clear picture of who is using the site or application. Personas generate *empathy for users* because they can be used as a touch-point whenever a question or concern arises about how aspects of the project should be designed. E.g. how would <Martha> perform <this task>? This helps keep the team on track and make decisions that are in the best interests of the users.

### HOW THE PERSONAS WERE DEVELOPED

These personas were created using data from five (5) user interviews conducted in November and December, 2012. The users were one broker, two insurers and two software providers who have used CSIO.com for work purposes.

### CSIO WEBSITE

CSIO's website, [www.csio.com](http://www.csio.com), was crawled by the Wayback Machine as far back as December, 1998.

A web stats report for the period of September, 2012 reveals that there are **1,033** different pages on the CSIO site. These are mostly .html and .cfm (Cold Fusion Markup) pages and PDF files. In September, the site received **2,260** unique visitors out of a total of **5,199** visits. Visitors are mostly from the United States, Canada and Russia. 62.2% of visitors in September used Internet Explorer, with Mozilla/Firefox and Safari in second and third place. The most popular keywords used to find the site from search engines in September were: csio, insurance, application, forms and habitational.

### CSIO TARGET AUDIENCE

The three main users of the CSIO site can be broken down into these groups:

- Brokers (or someone working at a brokerage firm)
- Employees of insurers/carriers/insurance companies
- Employees of software providers/vendor

**PRIMARY PERSONA - Martha Landsbury - 47-year-old insurance broker from Montreal, Canada**



“I need this form!”

Photo credit: by Flickr user “Rochelle, just rochelle” (Creative Commons license)

**Background**

Martha is a true “type A” personality: ambitious, competitive, assertive and even “aggressive when need be,” she says. But she is also a people person and an extrovert who enjoys meeting and interacting with people as much as possible. Growing up in Montreal, she performed well academically and earned a BA in political science from McGill. She always knew that she would be good at sales because of her people skills and eventually found an entry-level position at a brokerage in Montreal. She stayed with the firm for ten years before starting her own brokerage. Martha lives with her husband and teenage son in a house in the affluent Golden Square Mile neighbourhood of Montreal.

True to her “in charge” personality, Martha remains very hands-on with her work. She has only hired one employee – a personal assistant. She’ll often have her assistant access CSIONet in order to upload a document. She often checks the CSIONet status update ticker to confirm that the network is available.

She does everything else herself, including checking the CSIO website to download the industry forms that she needs to complete a customer's insurance policy. It’s especially important for Martha to see the dates on the forms. For example, she recently checked the site to see which CSIO forms were being used by software provider Applied and had to see the dates for this. Martha also participates in forms working groups and often needs to access information and materials for these events.

**More About Martha**

**Goals (Needs)**

To serve her customers quickly and efficiently, Martha needs CSIO industry forms. As she is in Quebec, she needs the forms in both English and French. Her desire is to beat her competition and become the top independent insurance broker in Montreal. *Additional site-specific goals:* looking up CSIO team extensions, checking membership list, searching for information in old press releases.

**Abilities (What they can do)**

She’s not a very technical person. She doesn't have a nuanced understanding of file formats and document standards.

**Desires (What they want)**

Would like to see a section geared toward brokers, publicizing how CSIO initiatives such as eDocs benefit brokers. E.g. “Tools for Brokers”.

**Technology and Web Background**

**Methods (How they do things now)**

She uses IE (latest version) on a Dell desktop running Windows XP.

**Internet Presence:** About average for her industry. She has a website for her firm that her assistant maintains but it doesn't get updated much.

**Mobile Usage:** Rarely accesses Internet on mobile. She doesn't like to download forms on her handset because she finds them too detailed to work with on a small screen. Occasionally uses iPad to view websites.

**Social Networking:** Mostly LinkedIn. She stays involved in a few LinkedIn discussion groups related to insurance.

**SECONDARY PERSONA - Florian Peppino - 37-year-old IT Manager from Toronto, Canada**



“Where’s the XML validation tool?”

Photo credit: by Flickr user “ILRI” (Creative Commons license)

**Background**

Born in Rosario, Argentina, Florian emigrated to Toronto with his parents in 1997, right after Florian finished his undergrad degree in information systems. He had been taking English lessons since high school, so his English was already good once he got to Canada. Florian is a personable and likeable guy who quickly made new friends upon his arrival to Toronto. It also didn't take long for him to find a technical support position at a software company, a job for which he was already overqualified. The company turned out to be one of the top suppliers of software to the Canadian insurance industry. They build and maintain broker management systems (BMSs) to expedite the flow of information between brokers and carriers. Florian gradually worked his way up in this company to become an IT Manager.

Brokers often have technical issues with their systems and they tend to get frustrated rather quickly when their BMS is not functioning perfectly. As such, Florian needs to keep a cool head at all times in order to not be overwhelmed by his job. He often checks the CSIONet ticker to see that the network is available. He also checks the Latest Developments section, but sometimes wishes that he could be informed directly about this news through an email distribution list. He'll occasionally submit a maintenance request (usually for XML more than EDI). He often uses the EDI validation tool and is pleased with its results. He has also used the XML validation tool but has encountered some issues with it, e.g. he couldn't easily copy the XML code that he had generated.

In the Industry Forms section, Florian likes how the forms are categorized by line of business but worries that the page will start getting unwieldy with new forms releases. When looking for a specific form, he will scroll down the page, checking the dates. This has been manageable so far, but can sometimes take longer than expected to find the form.

**More About Florian**

**Goals (Needs)**

In order of importance, Florian's main goals when accessing the CSIO site are: **1)** use the XML and EDI validation tools, **2)** download XML and EDI standards and **3)** download industry forms and mapped forms. *Additional site-specific goals:* looking up CSIO team extensions, registering for a standards working group, finding new insurance company members that have joined CSIO.

**Abilities (What they can do)**

Florian's technical skills are excellent. He has a strong understanding of computer science, web development and networking hardware.

**Technology and Web Background**

**Methods (How they do things now)**

VMware Workstation running multiple OSs, including Windows 7 and 8. Switches between latest IE and Chrome for browsing.

**Internet Presence:** Above average, but anonymous. Florian is an active contributor to Slashdot and the technology section on reddit.

**Social Networking:** Florian uses an anonymous account on Twitter for following subjects of interest to him, such as user experience. He occasionally follows insurance topics on LinkedIn.

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### SECONDARY PERSONA - Sam DeFrancesco - 45-year-old EDI Manager from Toronto, ON



“Is this CSIONet report up to date?”

Photo credit: by Flickr user “Wonderlane”  
(Creative Commons license)

#### Background

Sam was born in Edmonton, Alberta to Italian parents and decided to move to Ontario for university after graduating from high school. He studied Business at the University of Waterloo and worked as a Business Analyst at IBM after graduating. He’d heard from his manager about the potential in the insurance industry and decided to get the Certified Information Professional designation. He then went to work for Intact, where he has been for fifteen years.

Sam is a very focused and detail-oriented professional who has always commanded a lot of respect from his coworkers. He noticed formatting, spelling and grammatical issues on the CSIO.com website a few times. He found the homepage redesign to be an improvement, although still a little cluttered. Sam accesses the CSIO website 2-3 times a week to find a form, check the upcoming events and/or find the latest standards update (XML or EDI).

Sam finds the CSIONet report very useful because it allows him to verify machine addresses for CSIONet. He reviews the preparation materials and minutes for the standards working groups. He occasionally submits a maintenance request, usually for EDI.

#### More About Sam

##### Goals (Needs)

Sam mostly uses CSIO.com to get standards for team members and forms for underwriters. He also checks the CSIONet status a lot. He often needs to validate broker information using the CSIONet reports. He would also like to see a listing of who is working at CSIO and their contact info.

##### Abilities (What they can do)

Sam’s technical knowledge is more “old school”... he knows the fundamentals of technology and computers but doesn’t pay much attention to the latest developments, e.g. mobile apps.

##### Desires (What they want)

Member listing on homepage. He’d like to see the CSIONet report updated more often (perhaps monthly). He would also like for it to be easier to get specific forms. He doesn’t like how he has to do so much scrolling down to find the form he’s looking for. He would also like to see an underwriter-specific section. Finally, he’d like to see a listing of user groups for vendors so that brokers know who to contact regarding BMS issues.

#### Technology and Web Background

##### Methods (How they do things now)

Using Windows XP and Internet Explorer.

**Internet Presence:** Fairly average. He’s online all day while at work but generally only uses the Internet for work purposes. At home, he likes to stay away from using computers as much as possible.

**Social Networking:** Has a Facebook account but doesn’t use it for work purposes. He will occasionally check LinkedIn discussion boards relating to insurance at work.