

## Aquilent's Personae Development Approach

### Introduction

Personae (alternatively *personas*) are reliable and realistic representative of key audience segments used for reference. They are based on quantitative and some qualitative user research and web analytics. Personae:

- Represent a major user group for your content/service
- Express and focus on major needs and expectations of important user groups
- Give a clear picture of your user's expectations and approach to using your content/service
- Aid in uncovering universal features and functionality
- Describe real people with backgrounds, goals, and values

Personae make it easier to understand and be mindful of your various user groups and their disparate wants, needs, and approaches to utilizing your website. They provide a mechanism for evaluating new ideas, testing new designs, and evaluating information architecture, usability, content, and functionality.

### Methodology for creating personae

The development of personae should be evidence-based as much as possible. There is no substitute for good user research and website analytics, no matter how well personae authors may know/understand their audience groups.

Initial personae are typically created based on projected users and should be reviewed and revised once user data is available. For this reason, an iterative approach is recommended.

#### Iteration 1: Create initial persona based on key stakeholder

This step involves the synthesis of disparate elements into new personae. It relies on our best understanding of our user groups and uses metrics to support crafting personae. In future iterations individual personae will be more directly data-driven.

#### Iteration 2: Data-driven personae

The next iteration of personae will be more heavily data-driven relying metrics and feedback from prototype.

#### Iteration 3: Ongoing evaluation and refinement of personae

Like digital communications, your user groups are ever evolving including the introduction of new user groups as they are identified and the retirement of old user groups when they become less relevant or representative. As a result personae should be evaluated against available metrics and feedback on an iterative basis.

#### Input and data sources

Potential sources of qualitative and quantitative data for personae development and maintenance are numerous and varied.

## Qualitative

- Stakeholder, business driver, and metrics team interviews
- User interviews and surveys
- User task analysis and top tasks evaluation
- Customer feedback reporting (especially verbatims)
- Contact/helpdesk reporting (especially verbatims)
- Usability testing analysis and recommendations
- Social Media survey and reporting (especially verbatims)

## Quantitative

- Usage reporting
- Search reporting (both internal and external)
- Contact reporting
- Usability testing results
- Social Media reporting

## Components of a Persona

While purely narrative personae certainly exist, the most successful personae are presented as one-page user profiles leveraging as many visualizations as possible. It is important for each individual persona to be quickly grasped and easily remembered (see example below).

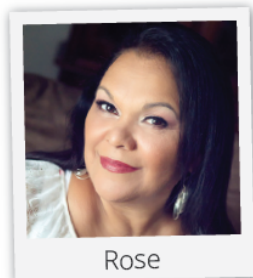
The key components of a successful persona include:

- User group(s) identification
- Fictional name and representative demographics
- Job titles and major responsibilities or background as it relates to site usage
- Their site goals and primary tasks
- Their physical, social, and technological environment
- A quote or tagline summarizing the persona/user group
- A representative image to help visualize the persona/user group

Other components of a successful persona include:

- Breakdown of persona's site access
- Identification of persona's expectations of the site (content, functionality, etc.)
- Any pain points the persona experiences using the site

## Consumer



**Age:** 59

**Occupation:** Food Services Worker

**Employer:** Food Services, Inc.

**Education Level:** High School

**Income:** \$35,000

### BACKGROUND

Rose is a minimum wage worker in the food services industry. Her husband, Carlos, receives Medicare benefits. English is not her first language. Her only access to the Internet is public libraries.

The premiums for her employer-sponsored health insurance are going up. She is looking for information about health care exchanges and wants to know if she qualifies for any benefits under the Affordable Care Act. She started her search on Google.

*"I am concerned about my ability to afford health care for my family."*

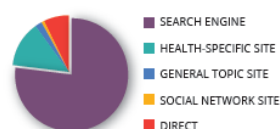
### DEVICES



### TECH SAVVY



### SITE ACCESS



### PRIMARY GOAL

Rose is a food service worker with a federal contracting company. She is concerned about how the Affordable Care Act affects her family. The company that she works for is increasing the level on employee-paid premiums. She lives in Virginia, but she doesn't know how to sign up or whether she is eligible.

- Find out if Virginia is participating in the health care exchanges and if she is eligible to apply

### FRUSTRATIONS & CHALLENGES

- English is not my first language and I find the information difficult to understand.
- I wanted to contact someone with a specific question but couldn't figure out whom or how.
- It's hard to tell whether I am on HHS.gov or if I have been sent off to another website.

### REASON FOR VISITING HHS.GOV

- Look for information about the Affordable Care Act
- Determine whether Virginia is participating in the health care exchange
- Find out if the Affordable Care Act will affect her husband's Medicare benefits

### FEATURES DESIRED

#### TASK-BASED NAVIGATION



#### MOBILE-FRIENDLY



#### AUDIENCE-BASED NAVIGATION



#### EASY TO READ CONTENT



#### CONSISTENT LOOK & FEEL



#### INTERACTIVE & MEDIA CONTENT



Task-Based Navigation  
Audience-Based Navigation  
Mobile-Friendly  
Consistent Look & Feel

Sample Persona from the US Department of Health and Human Services (HHS) website