PERSONAS NON GRATA NO MORE

How to welcome user personas into your development life cycle to improve decisions

WHO WE ARE

Bringing together Business Analysis and UX Design to create successful business products and improve the development lifecycle.

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OUR AGENDA TODAY

1 Why are personas valuable

2 What are user personas

3 How to avoid common pitfalls when creating personas

4 How personas help you generate successful stories

USER PERSONA DEFINITION

What are user personas

A representation of a user, based on research that incorporates their goals, needs, and interests.

CASE STUDY

The Accounts Payable department has noticed the number of late expense reports in the field have increased over the last few months. Understanding that they are very busy and most don't have access to the company's intranet until they get home in the evening or during the weekend, Debbie Thompson, the Finance CIO, solicited feedback via survey on what could be done to submit expense reports on time.

To Debbie's surprise, 95% of the people surveyed responded to the survey. An overwhelming 75% of the respondents indicated that, if they had access to the expense reporting tool via mobile device, it would be more efficient and a great time saver. Based on the responses to the survey, Debbie and her Accounts Payable manager, Janet Peterson, submitted a business case to the Project Approval board requesting funding. The objective of the project would be for the IT Department to develop an application or an interface that would make the Expense Reporting tool available via mobile devices.

GROUP EXERCISE

Persona Creation

TYPES OF PERSONAS

A user persona was defined earlier, but be aware that there are various types of user personas.

Provisional

Based on secondhand perspective of the user.

Proto

Created from secondary research and teams "informed" guesses

Buyer/Customer

Represented by a large segment of your audience, involved in purchasing your product or service

Marketing

Focused on demographic information, motivations, concerns, shopping preferences, media habits

HOW TO AVOID COMMON PITFALLS WHEN CREATING PERSONAS

IDENTIFY YOUR USERS

How do you know you're creating the correct personas if you don't identify your audience first?

An inaccurate understanding of users provides assumptions rather than validations.

PERSONAS ARE NOT ROLES

You might need multiple personas per role to accurately capture (focus) the user. Roles = tasks performed. Not how, when or why the tasks are performed.
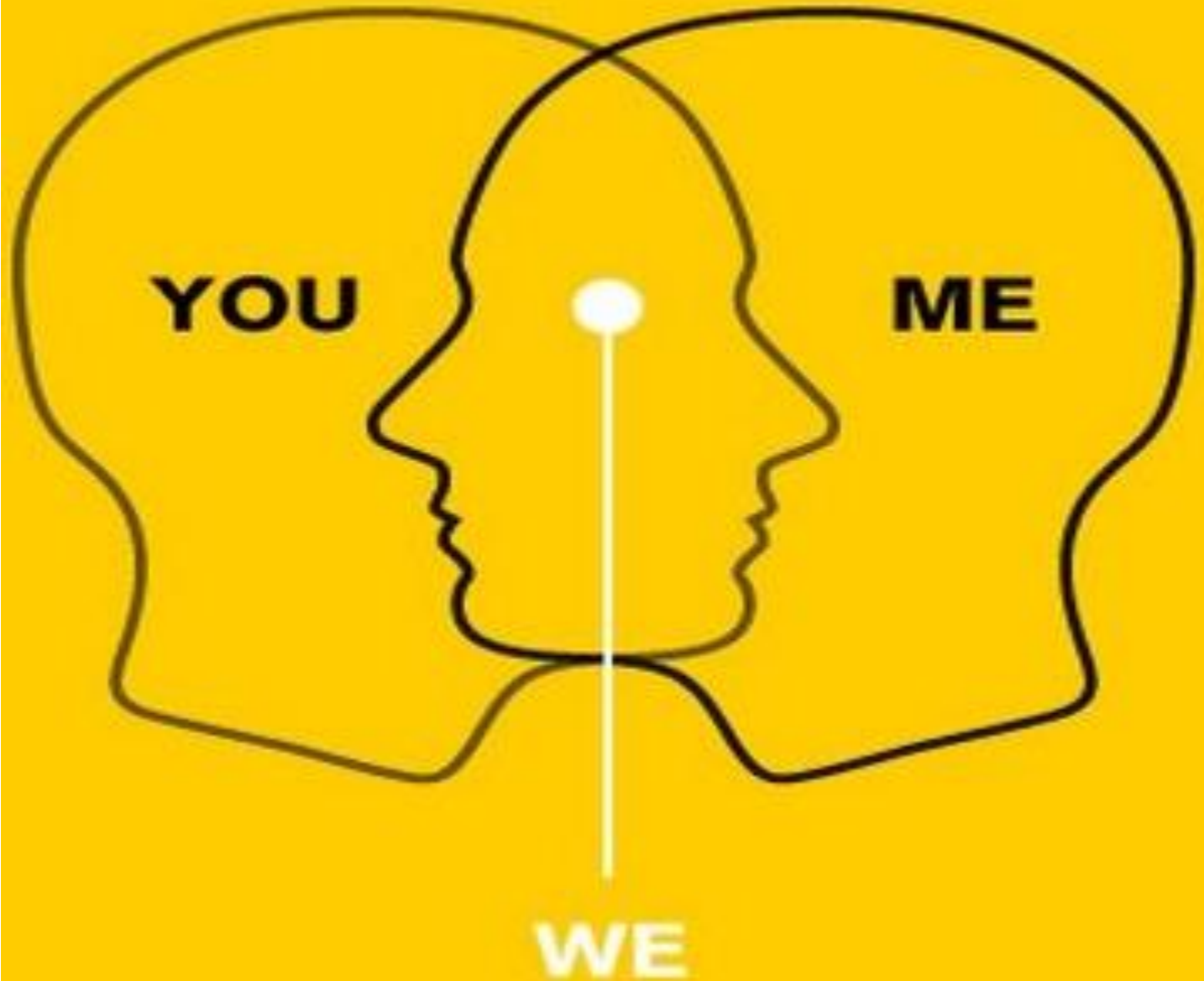
UNDERSTAND YOUR USERS

What was the user doing or finished doing when encountering the product?

What are they thinking and feeling, and how does that affect what they see and how they act?

What frustration is present in that situation, and how does it affect the user's perception and action?

ANALYZE PERSONAS FOR PATTERS

Too many personas can lead to the same result as too many cooks in the kitchen. Review personas and look for patterns that can be grouped. Each unique pattern should be represented with their own persona.

SHARE WITH OTHERS

To align your team with a persona the research data should be clearly summarized and placed somewhere that everyone can reference.
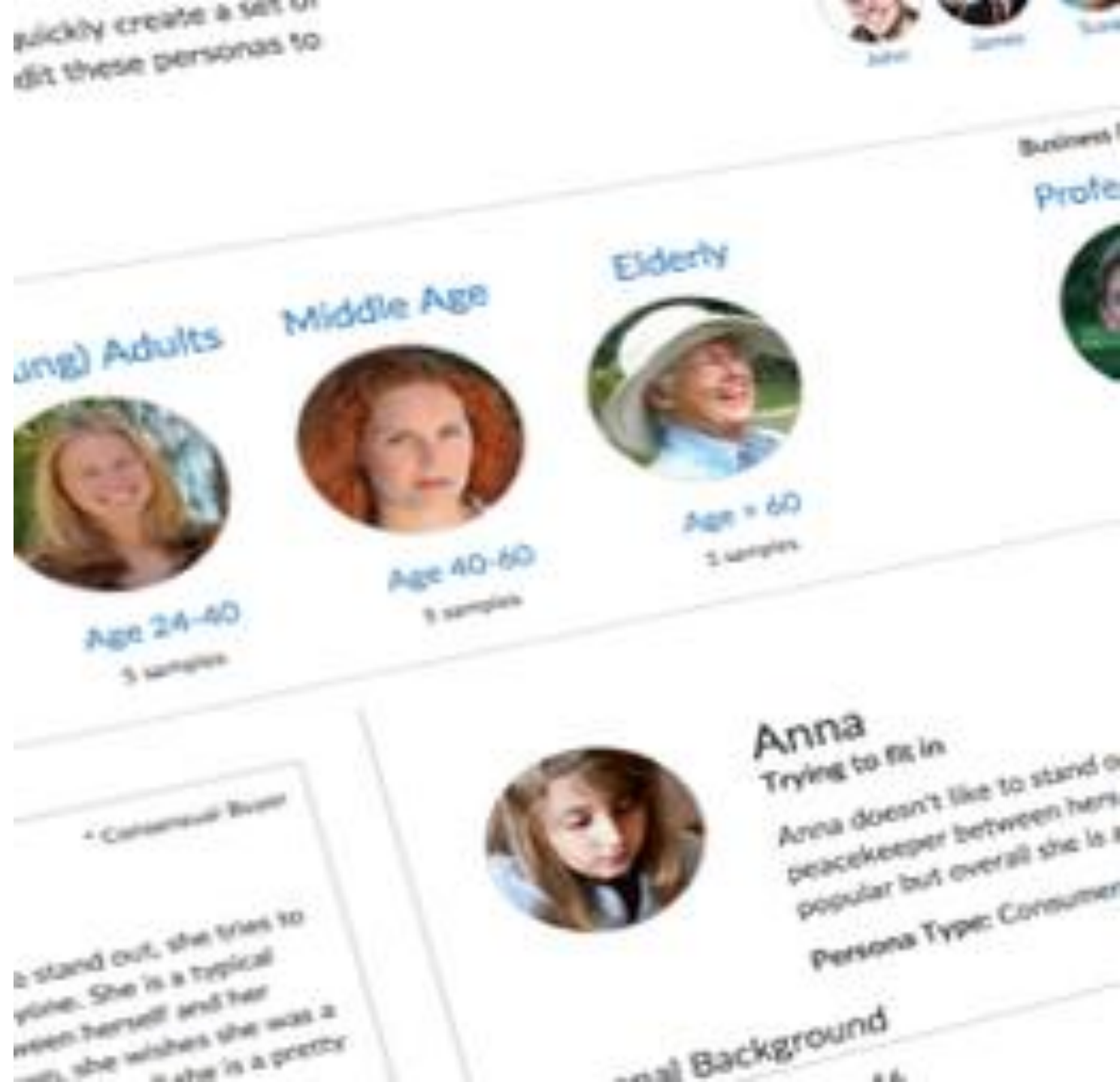
UPDATE PERSONAS FREQUENTLY

Not adjusting and refining your personas based on new insights or business needs gathered will lead to unrelated users.

DON'T BE GENERIC

If you target everyone, you actually target no one. You aren't targeting 18-54 year old field agents, you're targeting Mary, who is 53 loves cooking for her 2 grandkids, lives in Chicago.

HOW PERSONAS HELP YOU GENERATE SUCCESSFUL USER STORIES

GENERATE USER EMPATHY

Ensures that you are designing for your users as they actually are, and as they actually behave – not who you think they are.

MAINTAIN FOCUS

Express and focus on the major needs and expectations.

Motivates and focuses the development team to help the user.

MEASURE EFFECTIVENESS

Each persona gives you acceptance criteria that can measure effectiveness.

Stakeholders and leaders are able to evaluate the value of new product/service features before development, avoiding the ones that are never used.

MEASURE AND DEFEND DECISIONS

Helps generate stories by understanding the main user flow of the product/service.

The team can prioritize and design according to how the user actually uses the product/service, rather than how they think they use it.

Developing repetitive patterns into their own story or stories ensures that the development team will get that feature right, leading to your product's success

MEASURE AND DEFEND DECISIONS

Your solution is going to have to work for everyone; it needs to not offend the savvy 30 year old while not overwhelming the uncomfortable older user.

Enables refinement as a method for story splitting

User Story Splitting Tips

- Split by
  - capabilities offered
  - user roles
  - user personas
  - target device
  - CRUD boundaries
  - Happy path/other paths
- Zero/One/Many approach
  - What happens if we are dealing with nothing?
  - What happens if we are dealing with one thing?
  - What happens if we are dealing with many things?
- Walking skeleton
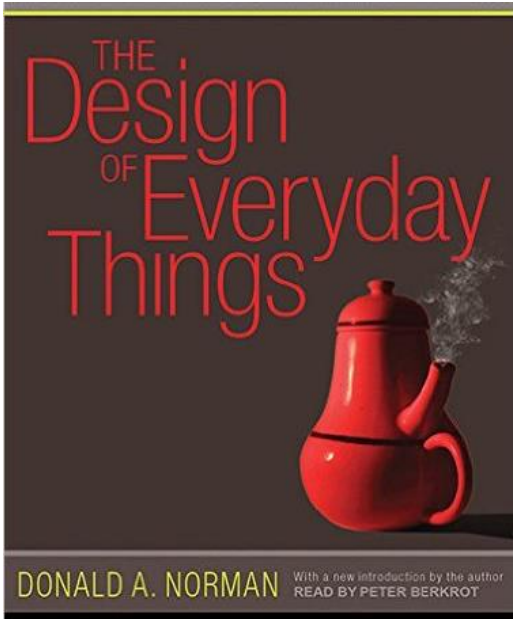
STORY SPLITTING

- Create Expense Report
- Update/Modify Expense Report
- Delete Expense Report
- View Historical Expense Report.

STORY SPLITTING

A story could be to address accessibility issues, like an older user who cannot see the small font on their iPhone.
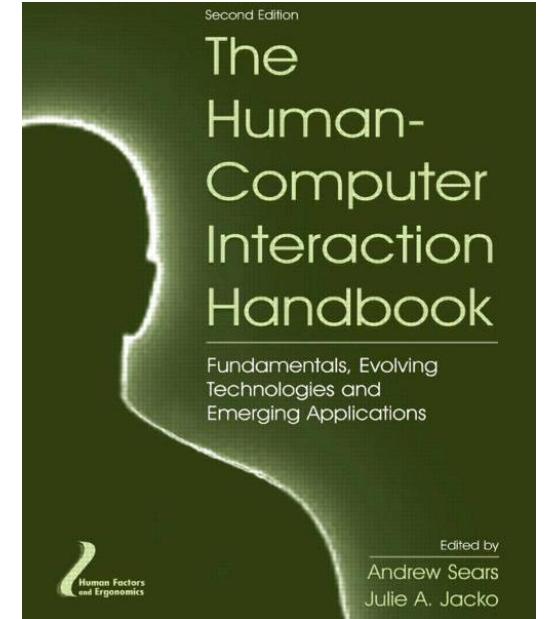
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RESOURCES

The Design of Everyday Things

Donald A. Norman

Build Better Products: A Modern Approach to Building Successful User-Centered Product

Lauren Klein

The Human-Computer Interaction Handbook: Second Edition

Andrew Sears, Julie A. Jacko

RESOURES

A Closer Look At Personas: A Guide To Developing The Right Ones (Part 2)

https://www.smashingmagazine.com/2014/08/a-closer-look-at-personas-part-2/

Creating Personas

http://www.uxbooth.com/articles/creating-personas

The Easy Way to Create User Personas: Tips, Tricks and Two Free Templates

http://www.givegoodux.com/creating-better-user-personas-tips-templates/

RESOURCES

- Visuals:

- Slide 9 (Identify Your Users) http://www.flatworldworks.com/uresearch.html

- Slide 10 (Personas Are Not Roles) https://s-media-cache-ak0.pinimg.com/736x/a3/4c/0e/a34c0ef23bdb491b11b88ee606c9eacb.jpg

- Slide 11 (Understand Your Users) https://www.interaction-design.org/literature/article/empathic-design-is-empathy-the-ux-holy-grail

- Slide 12 (Analyze Personas for Patterns) http://www.laylasoileau.com/works/smart-events-cloud/

- Slide 13 (Share with Others) http://www.contentmappingtool.com/blog/

- Slide 14 (Update Personas Frequently) https://www.smashingmagazine.com/2014/08/a-closer-look-at-personas-part-1/

- Slide 15 (Don't Be Generic) http://indiewatch.net/wp-content/uploads/2016/04/missed-target.jpg

- Slide 17 (User Empathy) http://www3.gehealthcare.com/en/products/categories/accessories_and_supplies/adventure_series_for_ct/pirate_island

- Slide 18 (Focus) http://www.authorsnest.org/dont-forget-to-focus/

- Slide 19 (Measure Effectiveness) https://www.act-on.com/blog/in-depth-guide-calculate-your-lead-generation-campaign-roi/

- Slide 20 (Defend Decisions) http://nostrategy.ru/wp-content/uploads/2015/03/cons.jpg

- Slide 21 (Defend Decisions) https://www.commercialintegrator.com/audiencecontent/problem-isnt-with-millennials-problem-is-with-old-people-in-the-workplace/

- Slide 23 (Story Splitting) https://mobilesyrup.com/2017/12/27/digitally-inaccessible-closer-look-accessibility-smartphones-canada/

THANK YOU

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