Creating personas

slide 1: Introduction

Hi guys! Welcome to [Fundamentals of User Experience Design ], a Tuts+ premium course. I’m [Sarah Kahn] and today we’re going to talk about creating user personas.

slide 2

Here’s what we’re going to cover:

* + What’s a user persona, and why make one?
  + Identifying roles
  + Identifying skill levels
  + Coming up with a Backstory
  + Fleshing it out
  + Assignment

slide 3

[jamie]

In our last lesson, ‘Finding out who your users are’, we talked about the various kinds of metrics that will influence your designs going forward. The problem is that metrics are often abstract, and design is a concrete process. Obviously there is no substitute for the real live feedback of real live users. But you can’t have users in your design planning meetings. Sometimes getting user feedback isn’t applicable or practical at that particular moment. This is where personas come in.

slide 4

[what’s a persona]

So what is a persona? A persona is a fictitious person, created as a stand-in for your actual users. Personas share characteristics of your actual users based on research and knowledge that you already have about them. Personas are beneficial because they help keep you and your teammates focused on the goals and needs of your users.

slide 5

[creating a persona]

This all sounds good, so how do you go about creating this imaginary friend? You can make someone up out of the blue, but with no basis in facts, the persona will probably do little good for your project.

slide 8

[win state]

First, you have to determine what constitutes a ‘win’ state in your app. What tasks constitute successful use? For example, for adzerk, our expert users are successfully serving ads and making use of a variety of our advanced tools. Intermediate users might be serving ads but we know that they rely on our help staff for configuration assistance. Beginners might think we’re google adsense. But in any case. Before we can paint a portrait of a user doing things well, okay, or failing in our app, we have to decide what doing well, doing okay, or failing even mean to us.

slide 7

[beginner/novice/intermediate/advanced]

To figure out what your definition of different types of users are, make a list of tasks that someone can do in your site. Organize them by difficulty, and you’ll start to see patterns emerge. You’ll recognize your users. I generally look to create personas representing at least 3 or 4 levels of familiarity with my system.

slide 8

[how good are they at other stuff?]

The next thing to consider is the level of comfort and skill that these users have with other systems, among other characteristics.

slide 9

[a variety of characteristics]

Let’s say you’re designing an accounting application. You might have an expert accountant like this dude here. He looks like he’s a serious badass with a pen and paper, but let’s suppose he’s not very good with Windows 7, the platform on which you’re developing your application.

slide 10

[personas wall]

Expert knowledge in one area does not necessarily equate to expert status across the board. This is why I generally like to create a spectrum of personas, with varying skillsets and comfort with different technologies as well as familiarity with the tasks of my system. Each and every one of them has been useful for making design decisions.

slide 11

[chart]

Here’s an example of how you might go about beginning to create a spectrum of users with different combinations of skill levels and roles in your application.

slide 12

[backstory]

This piece is a little bit of imagination and artistry. I tend to merge together a few different real live users that I’ve met or heard about second hand through colleagues or clients. It’s important to have this piece though, to assist you in thinking about your users and their motivations and frame of mind when they’re using your app. If it’s a mobile app, for example, are they yelling at their kids and trying to drive? (ehh well, I hope not. But you get the idea.) Maybe your user is using this app in the field and she’s juggling phone calls and data entry. Maybe she’s snoozing in a cubicle, and she hates her boss because she’s doing customer service part time while she’s trying to make her big break into the acting world. Ok, so these are possibly unrealistically flamboyant examples. But possibly not. One thing I’ve learned over the years is not to underestimate the wildness and fabulousness of my users, because reality is usually crazier than fiction, and my point being that these details help you think about things from the user’s point of view.

slide 13

[make a template]

slide 14

[jamie again]

Let’s go back up to my persona, Jamie, for a moment. In my shop, we do agile ux so we didn’t spend time making our personas quite as detailed as we might have in a different sort of environment.

This is an example of a persona for an administrator with expert domain knowledge.

Some of the things we made sure to define included: age, physical location, and whether or not the person’s use of the application was mandatory or discretionary. For your project, it might make sense to include different aspects about your user.

slide 13

[template basics]

whatever else you do or do not choose to include in your template, it should at least cover the following:

* + Name
  + Job title
  + Technical comfort
  + Location
  + Industry knowledge

The only way to know what other characteristics you might want to know about your users will be by knowing the project you’re applying them to, so unfortunately this can be a somewhat vague process. There’s no global persona that will always work for every project. But I can tell you this- include your client or other stakeholders in the discussion as you flesh these out. They have invaluable knowledge to help guide you through this process.

Your assignment:

* Create a persona

Applying what we’ve discussed here, pick a use case for your current project (for example, a technology novice and a beginning with your project) and create a persona for that user. Give them a name, a backstory, and a picture, in addition to adding 3-4 additional characteristics to the skeletal template that we discussed on slide 12.

Next time on [Fundamentals of User Experience Design ], will be [Lesson 6: Identifying Problems]. We’ll be using a lot of the data that we’ve talked about gathering up until now in this process, because finding and fixing problems is really the meat and potatoes of UX design. This is [Sarah Kahn], and from all of us here at Tuts+, thanks for listening!