Personas

Theme of the day

When writing a novel a writer should create living people; people not characters. A character is a caricature.

Understanding your user

Literature review

◦ Product marketing plans, brand strategy, market research, user surveys, technology specifications and white papers, business and technical journal articles, competitive studies

◦ Web searches for related and competing products and news,

◦ Usability study results and metrics

◦ Customer support data such as call centre statistics.

◦ The design team should collect this literature, use it as a basis for developing questions to ask stakeholders and SMEs, and later use it to supply additional domain knowledge and vocabulary, and to check against compiled user data.
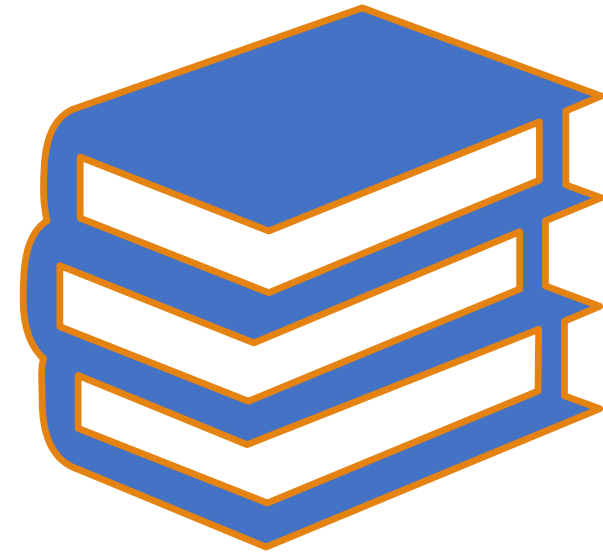
Understanding your user

Stakeholder interviews:

◦ Stakeholders are key members of the organization commissioning the design work.

◦ Typically include executives, managers, and representative contributors from development, sales, product management, marketing, customer support, design, and usability.

◦ To find out:
  ◦ Preliminary product vision
  ◦ Budget and schedule
  ◦ Technical constraints and opportunities
  ◦ Business drivers
  ◦ Stakeholders' perceptions of the user

Understanding your user

Subject matter expert (SME) interviews

- Similar to stakeholders, SMEs can provide valuable perspectives on a product and its users

- However designers should be careful to recognize that SMEs represent a somewhat skewed perspective.
  - often expert users.
  - knowledgeable, but they aren't designers
  - necessary in complex or specialized domains.

- You will want access to SMEs throughout the design process.

Understanding your user

Customer interviews

- Don't confuse users with customers

- Important to understand customers and satisfy their goals in order to make a product *viable*.

- Also important to realize that customers seldom actually use the product themselves, and when they do, they use it quite differently from the way their users do.

Understanding your user

◦ When interviewing customers, you will want to understand:
  ◦ Their goals in purchasing the product
  ◦ Their frustrations with current solutions
  ◦ Their decision process for purchasing a product of the type you're designing
  ◦ Their role in installation, maintenance, and management of the product
  ◦ Domain-related issues and vocabulary

Understanding your user

User Interviews
- The main focus of the design effort

- Information we are interested in learning from users includes:
  - When, why, and how the product is or will be used
  - Domain knowledge from a user perspective: What do users need to know to achieve their goals?
  - Goals and motivations for using the product
  - Mental model: how users think about their jobs and activities, as well as what expectations users have about the product
  - Problems and frustrations with current products (or an analogous system if no current product exists)

Understanding your user

User observation

Combining interviewing and observation, allows designers to ask clarifying questions and direct inquiries about situations and behaviours they observe in real time.

Product and competitive audits

Examine any existing version or prototype of the product, as well as its chief competitors.

Doing so gives the design team a sense of the state of the art

Target Audience - Personas

A persona is a way to model, summarise and communicate research about people who have been observed or researched in some way.

A persona is depicted as a specific person but is not a real individual; rather, it is synthesised from observations of many people.

Each persona represents a significant portion of people in the real world and **enables the designer to focus on a manageable and memorable cast of characters**, instead of focusing on thousands of individuals.
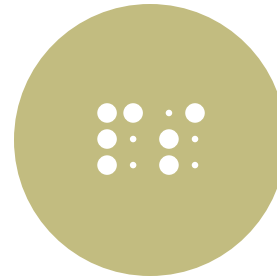
Personas aid designers to create different designs for different kinds of people and to design for a specific somebody, rather than a generic everybody.

Personas

Use your research to construct user models or **Personas**.

Personas are composite archetypes based on behavioural data gathered from the many actual users encountered the research phase.

In order to satisfy a diverse audience of users, logic might tell you to make it as broad in its functionality as possible to accommodate the most people.

This logic, however, is flawed. The best way to successfully accommodate a variety of users is to *design for specific types of individuals with specific needs*.

User goals

Alesandro's goals
- Go fast
- Have fun

Marge's goals
- Be safe
- Be comfortable

Dale's goals
- Haul big loads
- Be reliable

Cannot satisfy everyone

Personas are represented as individual people

The key to this approach is first to choose the right individuals to design for - those users whose needs best represent the needs of a larger set of key constituents.

Although personas are depicted as specific individuals, because they function as archetypes, they represent a *class* or *type* of user of a specific interactive product.

A persona encapsulates a distinct set of behaviour patterns, which are identified through the analysis of interview data, and supported by supplemental quantitative data as appropriate.

These patterns, along with specific motivations or goals, define our personas

Personas are represented as individual people

Personas are user models that are represented as specific, individual human beings.

They are not actual people but are synthesized directly from observations of real people.

This is appropriate and effective because of the unique aspects of personas as user models: They engage the *empathy* of the design and development towards the human target of the design.

Personas are based on research

Interviews with users outside of their use contexts

Information about users supplied by stakeholders and subject matter experts (SMEs)

Market research data such as focus groups and surveys
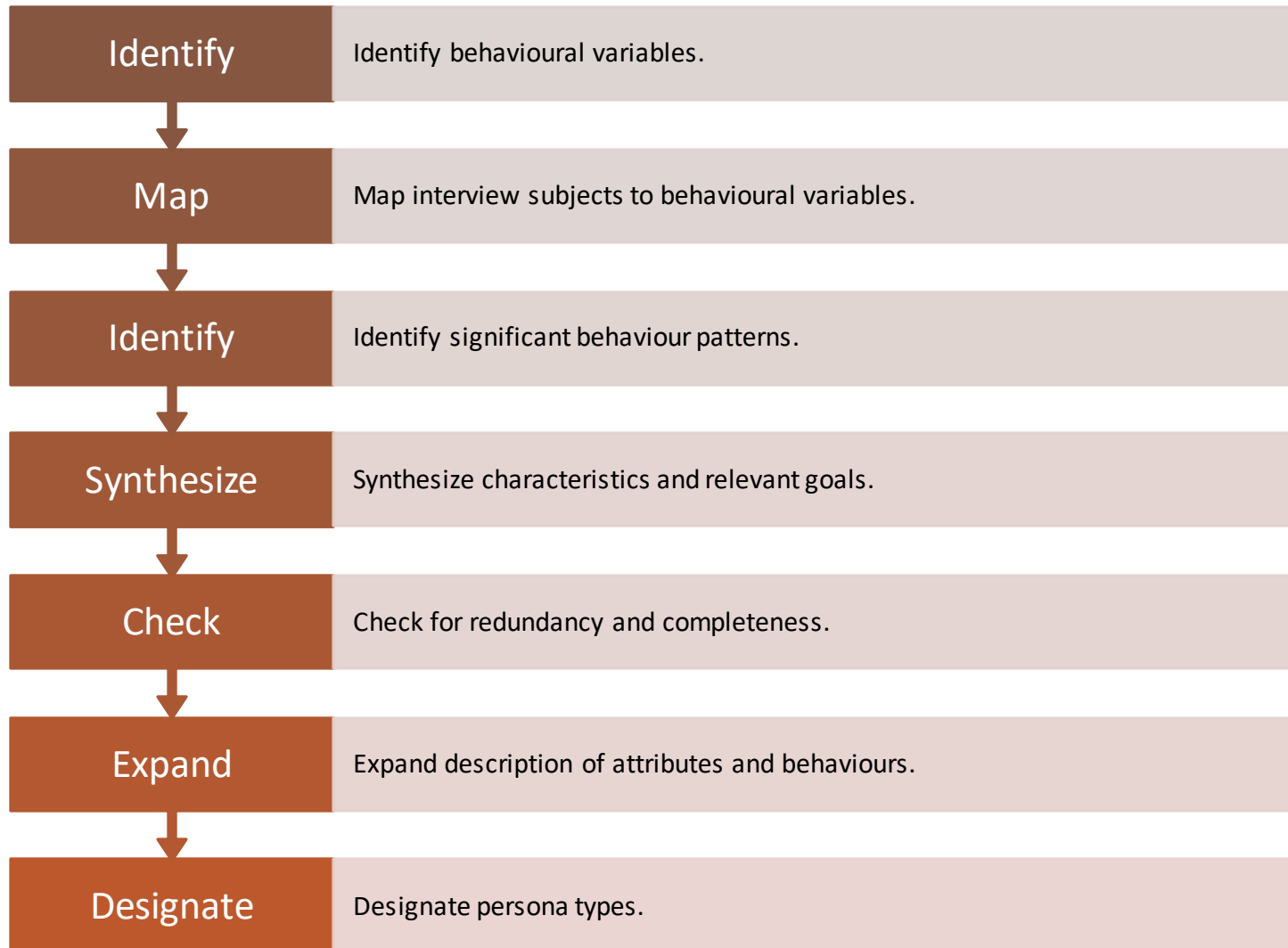
Market-segmentation models

Data gathered from literature reviews and previous studies

Personas must have goals

Understanding personas is more about understanding motivations and goals than it is about understanding specific tasks or demographics.

- *Experience goals*: how a user wants to feel
- *End goals*: what a user wants to do
- *Life goals*: who a user wants to be

Identify	Identify behavioural variables.
Map	Map interview subjects to behavioural variables.
Identify	Identify significant behaviour patterns.
Synthesize	Synthesize characteristics and relevant goals.
Check	Check for redundancy and completeness.
Expand	Expand description of attributes and behaviours.
Designate	Designate persona types.

Constructing Personas

Step 1: Identify behavioural variables

ACTIVITIES -WHAT THE USER DOES; FREQUENCY AND VOLUME

ATTITUDES -HOW THE USER THINKS ABOUT THE PRODUCT DOMAIN AND TECHNOLOGY

APTITUDES -WHAT EDUCATION AND TRAINING THE USER HAS; CAPABILITY TO LEARN
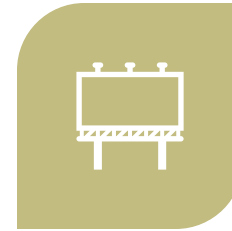
**MOTIVATIONS** -WHY THE USER IS ENGAGED IN THE PRODUCT DOMAIN
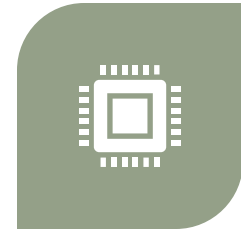
SKILLS -USER CAPABILITIES RELATED TO THE PRODUCT DOMAIN AND TECHNOLOGY

Step 2: Map interview subjects to behavioural variables

This is about figuring out what behavioural variables are most prevalent.

Some of variables will represent a continuous range of behaviour (for instance, from a computer novice to a computer expert), and a few will represent multiple discrete choices (e.g., uses a smart TV or not).
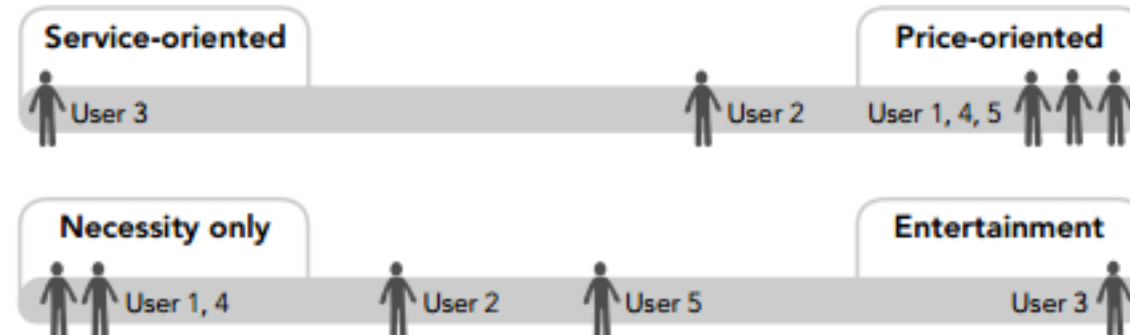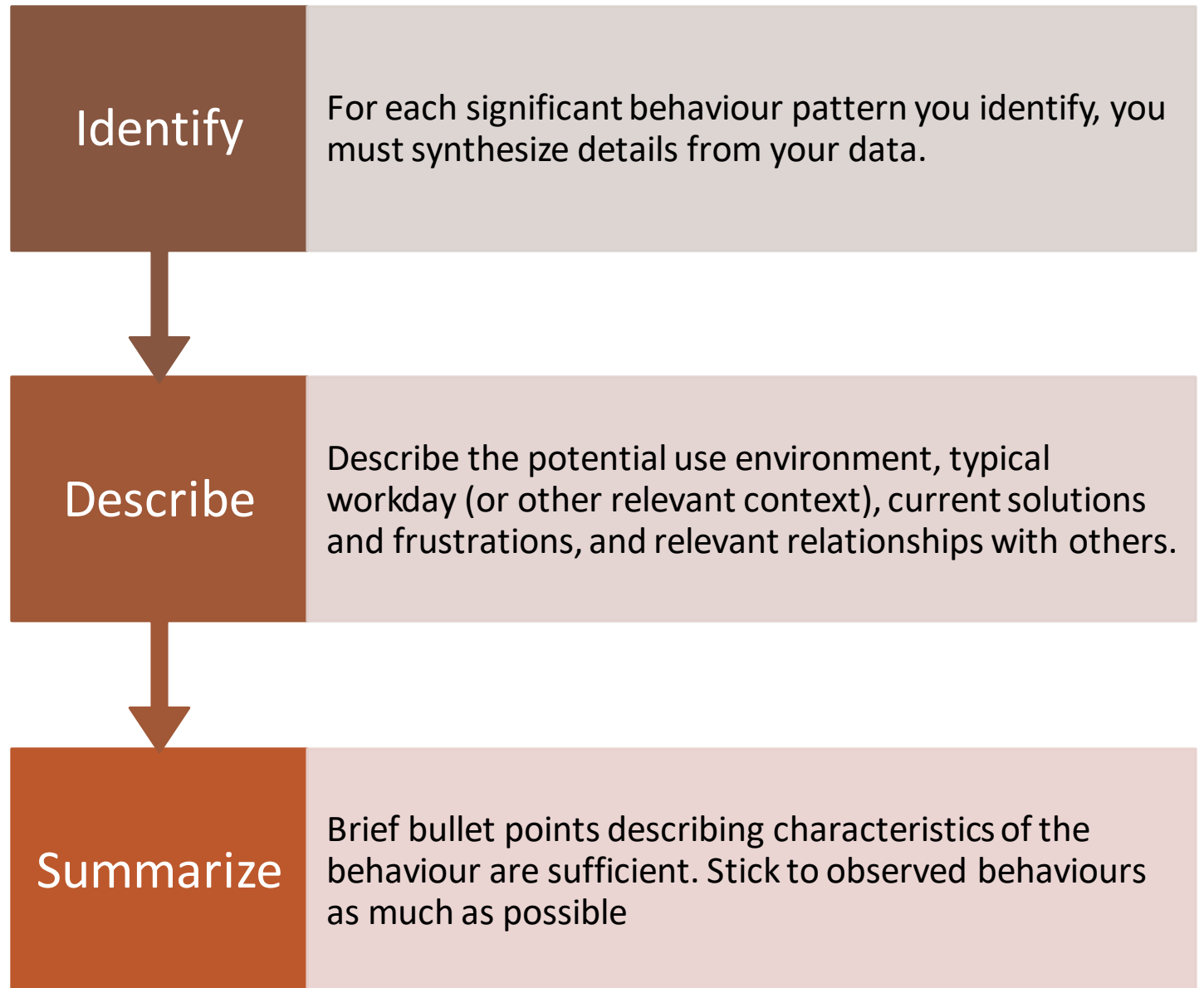
Step 3: Identify significant behaviour patterns

Look for clusters of subjects that occur across multiple ranges or variables.

A set of subjects who cluster in six to eight different variables will likely represent a significant behaviour pattern that will form the basis of a persona.

Step 4: Synthesize characteristics and relevant goals

Identify
For each significant behaviour pattern you identify, you must synthesize details from your data.

Describe
Describe the potential use environment, typical workday (or other relevant context), current solutions and frustrations, and relevant relationships with others.

Summarize
Brief bullet points describing characteristics of the behaviour are sufficient. Stick to observed behaviours as much as possible

Step 4: Synthesize characteristics and relevant goals

One fictional detail at this stage *is* important: the personas' first and last names.

The name should be evocative of the type of person the persona is, without tending toward caricature or stereotype.

You can also, at this time, add in some demographic information such as age, geographic location, relative income (if appropriate), and job title.

This information is primarily to help you visualise the persona better as you assemble the behavioural details. From this point on, you should refer to the persona by his or her name.

Step 4: Synthesise characteristics and relevant goals

Synthesising goals

By identifying the logical connections between each persona's behaviours, you can begin to infer the goals that lead to those behaviours.

You can infer goals both
- by observing actions (what interview subjects in each persona cluster are trying to accomplish and why) and
- by analysing subject responses to goal-oriented interview questions

Step 4: Synthesize characteristics and relevant goals

Goals must always directly relate, in some way, to the product being designed.

Typically, the majority of useful goals for a persona are **end goals** (3-5).

Life goals are most useful for personas of consumer-oriented products, but they can also make sense for enterprise personas in transient job roles. (0-1)

General **experience goals** such as "don't feel stupid" and "don't waste time" can be taken as implicit for almost any persona. Occasionally, a specific domain may dictate the need for more specific experience goals (0-2).

Step 5: Check for completeness and redundancy

Check your mappings and personas' characteristics and goals to see if there are any important gaps that need filling.

Are any political personas that you need to add to satisfy stakeholder assumptions or requests

Each persona must vary from all others in at least one significant behaviour.

If you find that two personas seem to vary only by demographics, you may choose to eliminate one of the redundant personas or tweak their characteristics to make them more distinct.

Step 6: Expand description of attributes and behaviours

Your list of bullet point characteristics and goals arrived at in Step 4 points to the essence of complex behaviours, but leaves much implied.

Third-person narrative is far more powerful at conveying the persona's attitudes, needs, and problems to other team members.

This narrative should be no longer than one or two pages of prose.

Step 6: Expand description of attributes and behaviours

The best narrative quickly introduces the persona in terms of his job or lifestyle, and briefly sketches a day in his life, including peeves, concerns, and interests that have direct bearing on the product.

Details should be an expansion of your list of characteristics, with additional data derived from your observations and interviews.

The narrative should express what the persona is looking for in the product by way of a conclusion.

Step 6: Expand description of attributes and behaviours

When you start developing your narrative, choose photographs of your personas. Photographs make them feel more real as you create the narrative and engage others on the team when you are finished.

Step 7: Designate persona types

Prioritise your personas to determine which should be the primary design target.

Primary - a single persona from the set whose needs and goals can be completely and happily satisfied by a single interface without disenfranchising any of the other personas.

Step 7: Designate persona types

Secondary - mostly satisfied with the primary persona's interface but has specific additional needs that can be accommodated without upsetting the product's ability to serve the primary persona.

Supplemental - needs are completely represented by a combination of primary and secondary personas and are completely satisfied by the solution we devise for one of our primaries.

Step 7: Designate persona types

Customer - address the needs of customers, not end users

Served - not users of the product at all; however, they are directly affected by the use of the product. Provide a way to track second-order social and physical ramifications of products

Negative - specific types of users that the product is not being built to serve. They aren't users of the product. Their use is purely rhetorical: to help communicate to other members of the team that a persona should definitely not be the design target for the product.

When rigorous personas aren't possible: Provisional personas

Rhetorical tools to clearly communicate assumptions about who the important users are and what they need, and to enforce rigorous thinking about serving specific user needs (even if these needs are not validated).

Rely on available data and designer best guesses about behaviours, motivations, and goals.

Typically based on a combination of stakeholder and subject matter expert knowledge of users (when available), as well as what is understood about users from existing market data.

Provisional Personas

Using provisional personas yields better results than no user models at all.

Can help focus the product team and build consensus around product features and behaviours.

Caveats: if you do not have data to back up your assumptions you may:

Focus on the wrong design target

Focus on the right target, but miss key behaviours that could differentiate your product

Have a difficult time getting buy-in from individuals and groups who did not participate in their creation

Discredit the value of personas, causing your organization to reject the use of personas in the long term

Provisional Personas

If you are using provisional personas, it's important to:

◦ Clearly label and explain them as such

◦ Represent them visually with sketches, not photos, to reinforce their provisional nature

◦ Try to make use of as much existing data as possible (market surveys, domain research, subject matter experts, field studies, or personas for similar products)

◦ Document what data was used and what assumptions were made

◦ Steer clear of stereotypes (more difficult to do without field data)

◦ Focus on behaviours and motivations, not demographics

What Does A Persona Look Like?

https://xtensio.com/user-persona/

What Does A Persona Look Like?

	Brian	Rachael	Lars
Name	Brian	Rachael	Lars
Job Title	Student	Teacher	Artist
Traits	• Computer Geek - technically savvy • Versed in cloud products • Versed in social networking • Spends a lot of time on line • Frequently collaborates with others online	• Computer user - mostly for work • Travels frequently for work • Not versed in cloud products • Works remotely • Occasionally will collaborate with colleagues online	• Computer user for entertainment, music, photos • Not versed in cloud products • Versed in social networking • Likes gadgets and has multiple devices • Does not collaborate online
Quote	*"I want to see who is available for chat immediately from my home page."*	*"I do not want to hang out on-line. I want to edit my work documents."*	*" need to know how much storage I have left, and get my files anywhere."*
Goals	• Organize documents and friends by groups easily • View who is online from his cloud homepage • Communicate instantly with chat • Edit multiple document types • Personalize his homepage with desired features	• Access documents from different locations • Have all documents synchronized without effort • Edit multiple document types • See edits and make notations in documents • Have reminder messages displayed in homepage calendar	• Have media and files backed up securely without effort • Have generous storage space • Access media and files from multiple devices.
Scenario	Brian is a busy guy with a lot of online friends and projects. He suggests using a cloud collaboration tool to his school mates to work on their projects. They are exchanging, editing and saving multiple file types. Brian is online at all hours and wants to see who on his team is available for chat from his cloud homepage.	Rachael starts working on a presentation from her home computer for a lecture she is giving out of town. She needs to make a change to the document from the hotel business center's computer. Once at her home page, she is reminded of a deadline by looking at her calendar. She receives a document from her boss and follows the notations inside of the document. She makes a change and emails it back.	Lars has just imported 200 pictures to his home computer from his camera to his local cloud folder. He logs into his homepage and he can see that he has 10 MB left of free storage. Later, he wants to show a friend his pictures from his phone.

http://www.loritompkins.com/v3/uxresearch-method.html

What Does A Persona Look Like?

While a persona is usually presented as a one-pager document, it is more than just a deliverable — it is a way to communicate and summarize research trends and patterns to others.
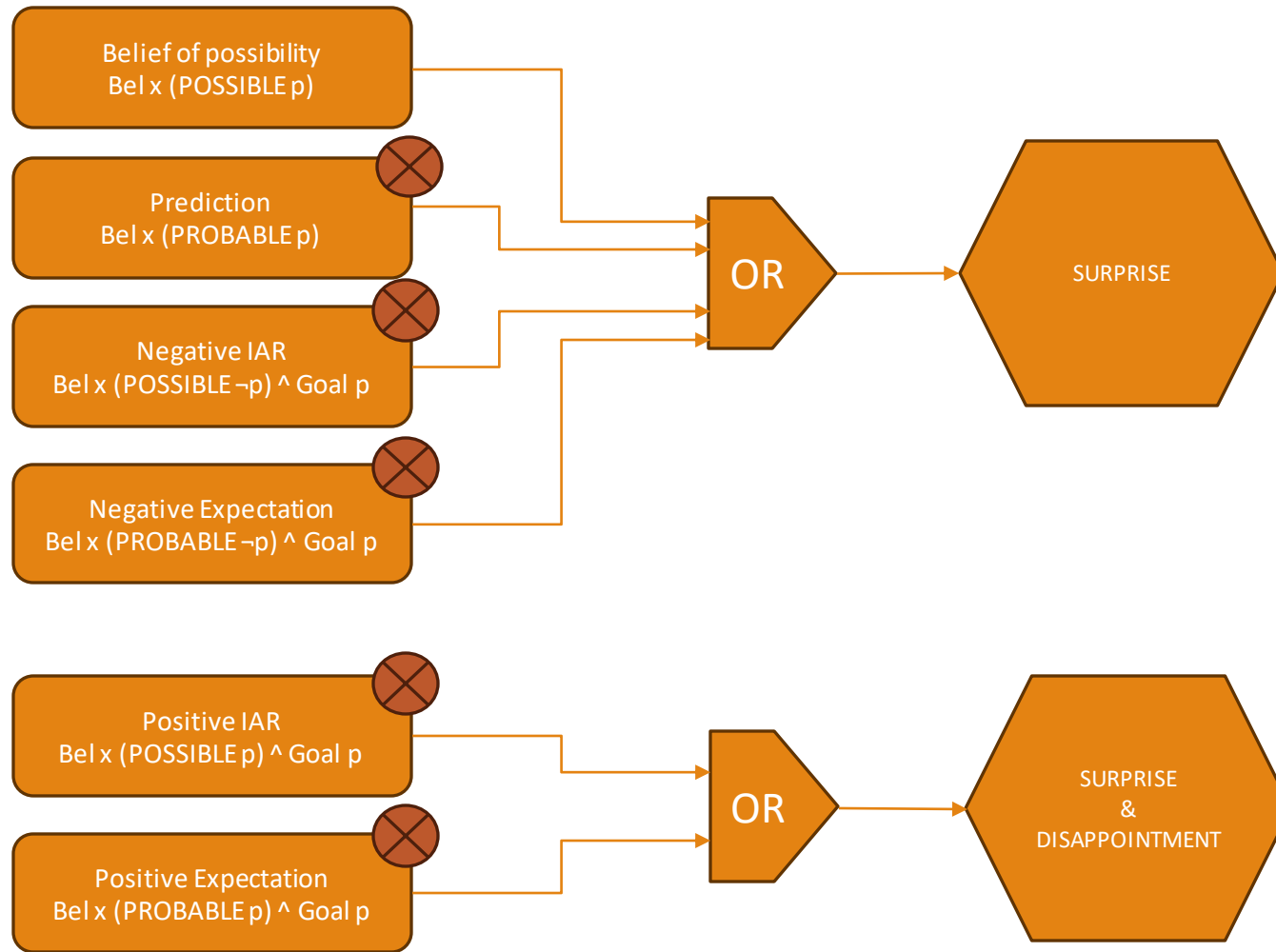
This fundamental understanding of users is what's important, not the document itself.

Archetypes and stereotypes

- Archetypes defined by:
  - their goals
  - their underlying psychology
  - what they are trying to achieve

- Stereotypes defined by:
  - their behaviour
  - their emotions
  - how we connect to them

Formalising goals

Imagine a user that uses a product when *curious* about something

From a psychological point of view, curiosity reflects the desire to close inherently unpleasant *information gaps*

This desire, however, depends on the *perceived likelihood* that the gap will be closed by accessing information

The amount of pre-existing knowledge in a particular domain may impact on the perceived likelihood of closure

This implies that curiosity may arise not only by increasing the amount of information available, but also by reducing the *perceived* size of the domain