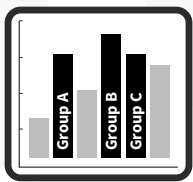




Engaging Personas

Engaging personas can incorporate both goal- and role-directed personas—as well as the more traditional rounded personas—to bring the personas to life. The 10 steps below cover the entire process from preliminary data collection, through active use and out the other side to continued persona development.

A Good Way to Get to Grips with the Process Is to Consider Its Four Main Parts:



Data collection and analysis of data
(steps 1, 2)



Persona descriptions
(steps 4, 5)



Scenarios for problem analysis and idea development
(steps 6, 9)



Acceptance from the organization and involvement of the design team
(steps 3, 7, 8, 10)

It's also good to remember, while it's better if you can follow all 10 steps, sometimes it will not be possible to do so, and that's OK too. Here we outline the 10-step process as described by Lene Nielsen in her Interaction Design Foundation encyclopedia article, [Personas](#).

01: Collect data. Collect as much knowledge about your users as possible through high-quality user research of actual users in your target user group. In design thinking, this research phase is the first phase of the process, known as the Empathize phase

02: Form a hypothesis. Based upon your research, start to form a general idea about the various users within your focus area. This should include the formation of a hypothesis about the ways users differ from one another—you can use affinity diagrams and empathy maps to complete this step.

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- 03: Ensure everyone accepts the hypothesis.** The goal at this stage is to decide whether to support or reject the hypothesis about differences between users. You can make this decision by confronting project participants with the hypothesis and comparing it to existing knowledge.
- 04: Establish a number of personas.** Decide upon the final number of personas it makes sense to create, based on your hypothesis about how users are different and therefore how your target group can be split into different types of user. You will likely want to create more than one persona for each product or service you create, but you should always choose just one or two personas as your primary focus.
- 05: Construct and describe your personas.** The purpose of working with personas is to develop solutions, products and services based upon the needs and goals of your users. When you construct and describe personas, make sure to express enough understanding and empathy towards your users. You should include:
- a:** Details about the user's education, lifestyle, interests, values, goals, needs, limitations, desires, attitudes and patterns of behavior.
 - b:** A few fictional personal details to make the persona a realistic character.
 - c:** An individual name—e.g., Paul or Jane.
 - d:** 1–2 pages which describe the persona in more detail.
- 06: Prepare situations for your personas.** Describe a number of specific situations that could trigger the use of the product or service you plan to design. By the end of this step, you should have a list of the needs of your personas, as well as a list of situations your product or service would be used in. You'll utilize these lists again in Step 9.
- 07: Get acceptance from your organization.** You'll have noticed by now that one common thread throughout this method is to involve wider members of your team. You should therefore regroup at this stage and ensure as many team members as possible participate, accept and recognize the development of personas. You can either ask the wider team for their opinion at this stage or (even better) let them participate actively in the process.

- 08: Disseminate knowledge.** Regardless of how you choose to include other team members, the personas you have constructed and described now need to be disseminated to all. It's important to decide early on how you want to disseminate this knowledge to those who have not participated directly in the process—to future new employees and external partners, for example.
- 09: Create scenarios for your personas.** Personas have no value until they become part of a scenario—i.e., until you tell a story about how the persona uses a future product. Based on their needs, feature each of your personas as the user in your situations from Step 6 to bring them to life. You'll gain a greater understanding of the problem each persona wants to solve as you act out these scenarios which will prove very informative for your design process as a whole.
- 10: Make ongoing adjustments.** The last step is concerned with how you use the personas in the future. You should revise the descriptions regularly as new information, perspectives and aspects may affect how you originally constructed or described your personas. Sometimes you'll need to rewrite the existing persona descriptions, add new personas or eliminate outdated ones.

Lene Nielsen's poster (on the next page) and template (on the page after next) covers the 10-step process to create engaging personas. This is the type of persona which participants are most likely to find relevant and useful in their design process and therefore use as a base for their ideation processes.

10 Steps to Personas

Based on the method “Engaging Personas and Narrative Scenarios” by Ph.D. Lene Nielsen

1. Collect data

Questions asked

Who are the users?
How many users are there?
What do they do with the system?

Methods used

Quantitative data collection

Documents produced

Reports



2. Form a hypothesis

Questions asked

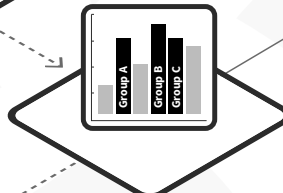
What are the differences among users?

Methods used

Analyze the material
Group the users
Identify and name the groups

Documents produced

Draft description of target groups



3. Ensure everyone accepts the hypothesis

Questions asked

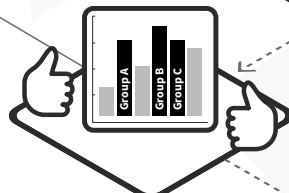
Data for Personas: Likes/dislikes, needs, values
Data for situations: Area of work, work conditions
Data for Scenarios: Work strategies and goals, information strategies and goals

Methods used

Qualitative data collection

Documents produced

Reports



4. Establish a number of personas

Questions asked

Does the initial grouping hold?
Are there other groups to consider?
Are all equally important?

Methods used

Categorization

Documents produced

Description of categories



5. Construct and describe your personas

Questions asked

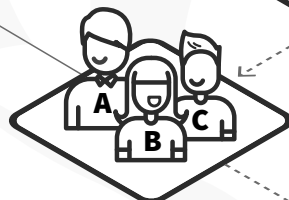
Body (name, age, picture)
Psyche (extrovert/introvert)
Background (occupation)
Emotions (towards the tech, sender, information)

Methods used

Categorization

Documents produced

Descriptions of categories



6. Prepare situations for your personas

Questions asked

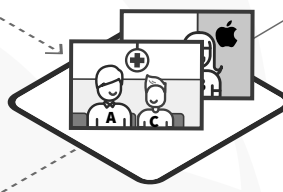
What are the needs of this persona?
What are the situations?

Methods used

Analyzing data for situations and needs

Documents produced

Catalogue of needs and situations



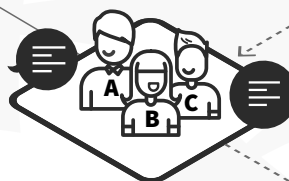
7. Get acceptance from your organization

Questions asked

Do you know someone like this?

Methods used

People who know the personas read and comment on persona descriptions



8. Disseminate knowledge

Questions asked

How can we share the personas with the organization?

Methods used

Posters, meetings, emails, campaigns of every sort, events



9. Create scenarios for your personas

Questions asked

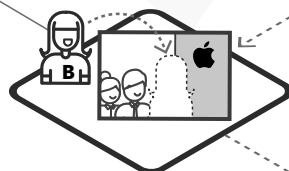
In a given situation, with a given goal, what happens when the persona uses the technology?

Methods used

The narrative scenario—using personas, descriptions and situations to form scenarios

Documents produced

Scenarios, use cases, requirements, specifications



10. Make ongoing adjustments

Questions asked

Does new information alter the personas?

Methods used

Usability tests, new data collection
Feedback regarding users from all those interacting with them e.g., sales, support, trainers

Documents produced

Foundation document



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10 Steps to Personas

Based on the method “Engaging Personas and Narrative Scenarios” by Ph.D. Lene Nielsen

1. Collect data

Who are the users?

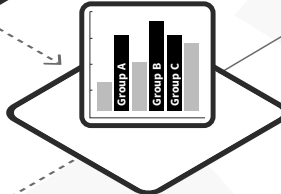
How many users are there?

What do they do with the system?



2. Form a hypothesis

What are the differences among users?

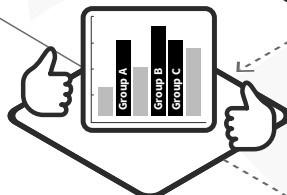


3. Ensure everyone accepts the hypothesis

Personas: Likes/dislikes, needs, values

Situations: Areas and conditions

Scenarios: Strategies and goals



4. Establish a number of personas

Does the initial grouping hold?

Are there other groups to consider?

Are all equally important?



5. Construct and describe your personas

Body (name, age, picture)

Psyche (introvert/extrovert)

Background (occupation)

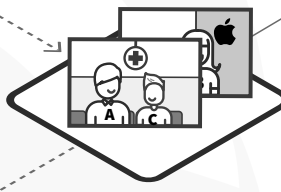
Who are the users?



6. Prepare situations for your personas

What are the needs of these personas?

What are the situations?



7. Get acceptance from your organization

Do you know someone like this?



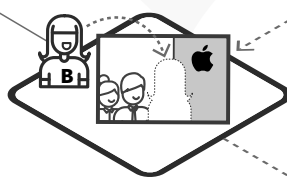
8. Disseminate knowledge

How can we share the personas with the organization?



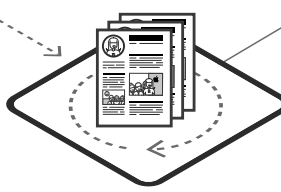
9. Create scenarios for your personas

In a given situation, with a given goal, what happens when the persona uses the technology?



10. Make ongoing adjustments

Does new information alter the personas?



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- The Five Elements of UX Design
- What the most common UX Deliverables are
- What the Key 7 Factors that affect User Experiences are
- What a UX Designer's Portfolio is and why it is necessary for pursuing a career in UX
- What it is like to work as a UX Designer
- What skills UX hirers look for in an applicant

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