Persona
User Journey
[Define]

"Create an out of the world picture that is cute, relevant to pacific northwest and about a painter who is painting a portrait of what species the painter is. There are many of these individuals sitting in front of the painter, from which the painter draws his inspiration from" ChatGPT

Announcements

Double Diamond: Phase: Define

Objective: Synthesize insights into clear problem statement and user requirements

Method : Synthesize data -> Problem statement; Persona, Journey mapping ->User requirements
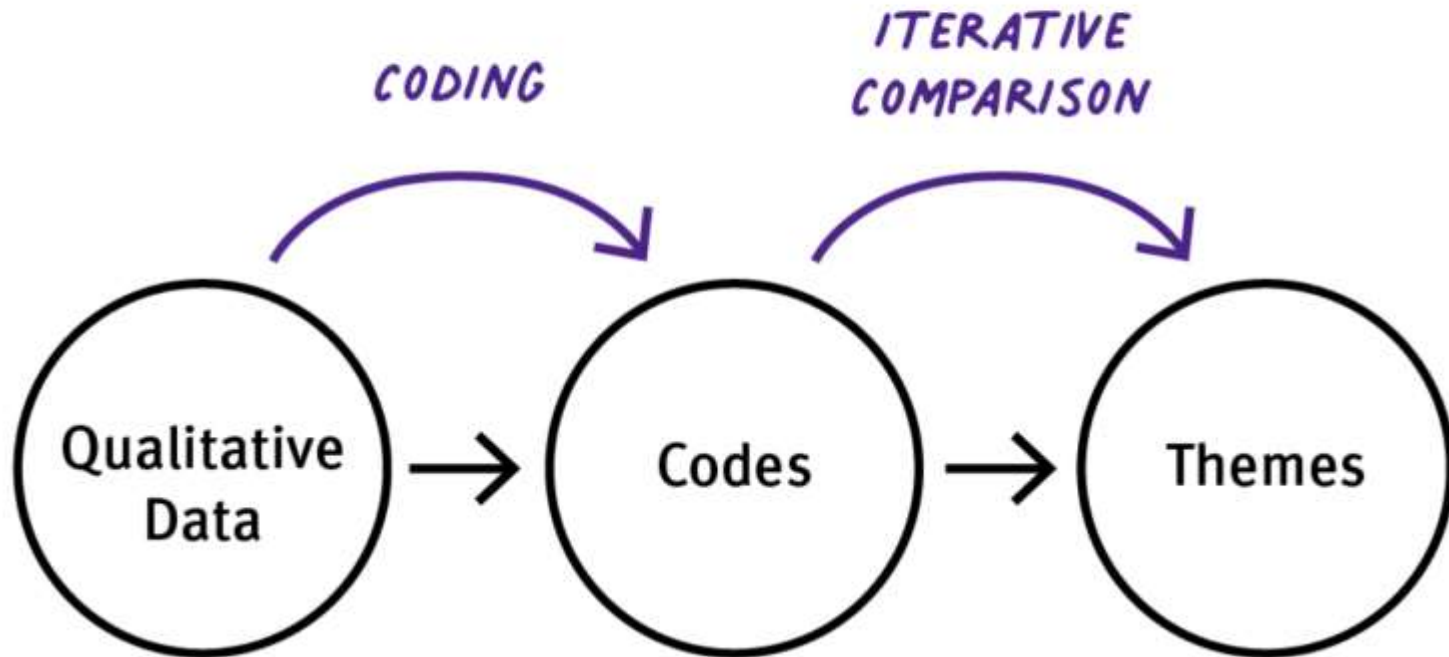
Class: Thematic Analysis, Personas, Journey maps

Outcome: design brief that provides a focused direction for developing solutions.

Reflection on CI questions

You have done the interviews/observations, now what?

Thematic Analysis

CODING

ITERATIVE COMPARISON

Qualitative Data → Codes → Themes

https://www.nngroup.com/articles/thematic-analysis/

Code Types

- Descriptive: Describes what the data is
- Interpretive: Adds researcher's interpretive lens

Coding Steps

1. Gather raw data: transcriptions of recordings
2. Read from beginning to end (Individually)
   - Highlight important pieces
   - Pass on to others/annotate

Coding Steps

1. Gather raw data: transcriptions of recordings
2. Read from beginning to end (Individually)
   - Highlight important pieces
   - Pass on to others/annotate
3. Code the text

Review each segment of text and ask yourself "What is this about?" Give the fragment a name that describes the data (a *descriptive code*). You can also add interpretive codes to the text at this stage. However, these will typically become *easier to assign later*.

or

Group segments of text, then assign a code
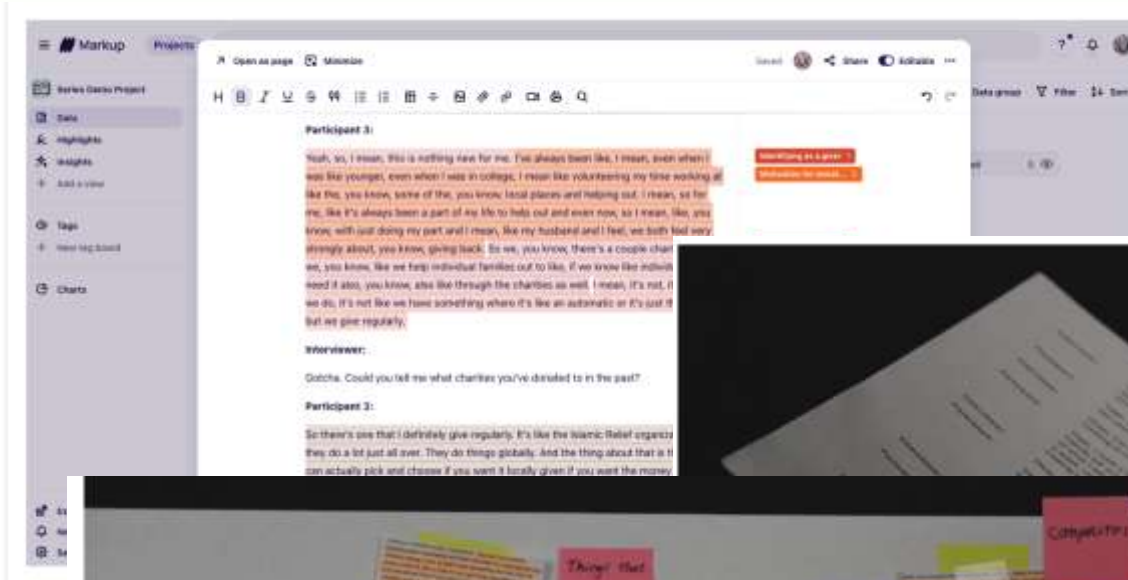
Iterate / new higher level codes

Ask yourself the following questions:

- What's going on in each group?

- How are these codes related?

- How do these relate to my research questions?

Your turn… (13 year old's field interview)

"So, I use the app to track my steps and stuff 'cause my mom says I need to move more. It's kinda cool 'cause it gives me badges when I walk a lot, but sometimes it's confusing. Like one time, I wanted to log my basketball practice, but I accidentally picked 'yoga' instead. I thought I could just change it, but I couldn't find any way to delete or edit it. I clicked around everywhere and nothing worked, so now it just shows that I did yoga for an hour and not basketball, which is kinda annoying 'cause I don't even do yoga!"

"Also, the buttons are weird—like, the back button sometimes takes me all the way to the home screen instead of just going one step back. And when I was setting my goals, I typed in 10,000 steps but I must've tapped an extra zero or something, and now it says 100,000. I don't even know how to fix it. I looked in settings, but it wasn't there, or maybe I just couldn't find it. I just gave up after a while."

Questions to guide your analysis

- Pain Points
  - What usability issues are raised by the user's comments?
  - Was the system giving the user adequate feedback when actions were taken?
  - How might a lack of feedback have contributed to confusion or errors?
- Mental Models
  - What assumptions did the user have about how the app should behave (e.g., editing an entry)?
  - How did these expectations align or conflict with the actual design?
- Error Recovery
  - What kinds of errors did the user encounter?
  - How did the system support—or fail to support—recovery from these errors?
- Emotional Impact
  - How did these experiences affect the user's motivation to continue using the app?
  - Are there signs of frustration or loss of trust in the system?

Sample Code Book

Excerpt	Initial Codes	Code Description
"I accidentally picked 'yoga' instead of basketball. I thought I could just change it, but I couldn't…"	Error Recovery	User makes an input error and cannot fix it
"I clicked around everywhere and nothing worked…"	Lack of Control	UI does not offer or clearly show how to edit entries
"The back button sometimes takes me all the way to the home screen…"	Confusing Navigation	Back button violates expected stepwise navigation
"I typed 10,000 but it says 100,000. I don't even know how to fix it."	Error Prevention	System does not prevent or alert user to improbable input
"I just gave up after a while."	Emotional Impact	Evidence of user giving up due to poor UX

From Themes to Personas

What user traits would you bring from your thematic analysis to design your persona?

Insights on your user

- Who they are (Background)

• How do users' goals vary?

• How do users' experiences vary?

• How do users' behaviors vary? (can't fix mistakes, gets discouraged easily, tries clicking around to fix problems)

Part of selecting a design idea is selecting which kind of people you are designing for

How do persona's help in design

- Not real people, but synthesized from real user characteristics

- Should not be idealised

- Bring them to life with a name, characteristics, goals, personal background: https://generated.photos/faces
  - Creates empathy

- Develop multiple personas

Personas – make __Goals__ specific

General persona have too many conflicting goals

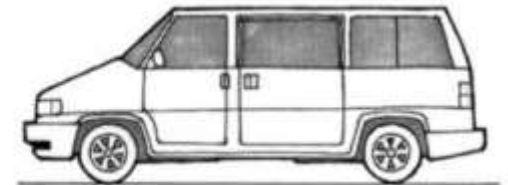Specific personas have
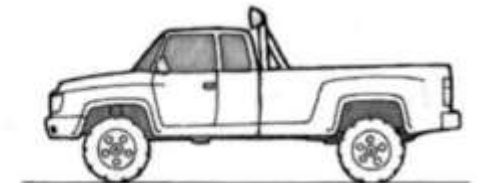clear, well-articulated goals

Alesandro's goals
- Go fast
- Have fun

Marge's goals
- Be safe
- Be comfortable

Dale's goals
- Haul big loads
- Be reliable

How to create Personas

- Define them
  - Identify major clusters from multiple user interviews/inquiries
  - Synthesize their goals & capabilities
  - Check for completeness and specificity

- Specificity prevents "elastic user"
  - Try them out by developing narrative

- Design each interface for a single primary persona
  - Yet other type might use the interface

Who can be the different types of users

For fitness app?

User Type	Primary Goals	Preferred Features / Interactions	Usage Context
Teen Athlete (13 yrs)	Improve performance in sports, compete with friends	Gamified goals, badges, social sharing, activity-specific tracking (e.g., basketball)	Uses app after practice or with peer group
Busy Parent (35 yrs)	Track daily activity, manage weight, stay healthy for family	Simple dashboard, step count, reminders, sync with smartwatch	Uses app in short bursts during the day
Older Adult (65 yrs)	Maintain mobility, track walking habits,	Large fonts, voice assistance, daily step goal,	Uses app while walking or after
Fitness Enthusiast (25 yrs)	Optimize workouts, track macros, analyze trends	Detailed analytics, integration with wearable tech, customized training plans	Uses app at gym, reviews progress weekly
Rehabilitation Patient (45 yrs)	Follow rehab program, report symptoms,	Guided exercises, daily check-ins, messaging	Uses app with care team or during
Casual User (30 yrs)	"Just move more", try to be healthier	Streaks, gentle nudges, simple charts	Opens app a few times a week for

60+ persona templates: https://www.justinmind.com/blog/user-persona-templates/

MARGARET L.

67 | OLDER ADULT

Goals

- Maintain mobility and independence
- Track daily walks and heart rate after recent health check
- Share progress with her daughter and doctor

Frustrations

- Can't edit logged workouts if a mistake is made
- Navigation is confuging— sometimes accidentally the session
- Doesn't understand some app terminology (e.g., "recovery time")

Design Needs

- Simple interface with large buttons and readable text
- Gentle reminders and encouragement
- Easy-to-access help or guided onboarding

Hobbies

- Gardening
- Walking with her neighbor
- Reading mystery novels
- Video chatting with grandchildren

"I just want something simple that helps me stay active and lets me share my progress with my daughter"

JORDAN M.

13 | TEEN ATHLETE

Goals

- Track sports practices and progress
- Compete with friends for badges
- Build stamina for basketball tryouts

Frustrations

- Can't edit logged workouts if mistakes made
- Confusing navigation, sometimes accidently exits application
- doesn't understand app terminology (recovery timer)

Skills

- High (uses phone, games, social media)
- Quick learner with tech
- Explores by tapping around
- Follows visual cues, avoids reading long text

Hobbies

- Basketball
- Playing Fortnite with friends
- Watching sports videos on YouTube
- Collecting digital badges

"I want to track how I'm doing and see how I stack up against my friends— it should be quick and easy"

Key Takeaways

- Goals drive features: A user focused on recovery will need totally different features than a competitive athlete.

- Interface matters: An older adult may need large buttons and minimal choices, while a data-driven user wants customization.

- Context shapes use: Some users will interact with the app on-the-go; others only at specific times (e.g., after a workout or before bed).

- One size doesn't fit all: A "universal design" without personas risks frustrating all users by pleasing none.

User Journey
[Define]

https://chatgpt.com/share/67e061f3-1cd4-8006-aa74-f5fc265eac11

Journey Map

Visualization of the **process** that a person goes through to accomplish a goal

- Timeline of series of user actions

- Create narrative by adding user thoughts and emotions

Bigger than User Stories (individual implementation)

Smaller than Experience Map, which is agnostic of a specific business or product

https://www.nngroup.com/articles/journey-mapping-101/

CUSTOMER/USER JOURNEY MAP

SPECIFIC USER + SCENARIO + GOALS

PHASE 1	PHASE 2	PHASE 3
1. _____ 2. _____	3. _____ 4. _____ 5. _____ 6. _____	7. _____ 8. _____ 9. _____

OPPORTUNITIES + INTERNAL OWNERSHIP

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Components of a Journey Map

1. Actor

2. Scenario /Goals/Expectations

3. Journey Phases

4. Actions, Mindsets, and Emotions

5. Opportunities

Actor = Persona

- Build a strong, clear narrative by using one persona = one point of view per map

- Example: the journey of a student or faculty will be different when using Canvas

- You will have multiple maps for different persona (goals)

Scenario + Goals/Expectations

- Describes the situation (will eventually become your tasks)

- Best for: sequence of events, describe a process, use multiple channels (touchpoints with applications)

- Current or anticipated journeys

Journey Phases

High level stages/task outline

Example:

- ecommerce scenario (buy Bluetooth speakers): discover, try, buy, use, seek support.

- luxury purchase (buy a car): engagement, education, research, evaluation, justification.

- business-to-business scenario (using PollEv): advocacy, purchase, adoption, expansion
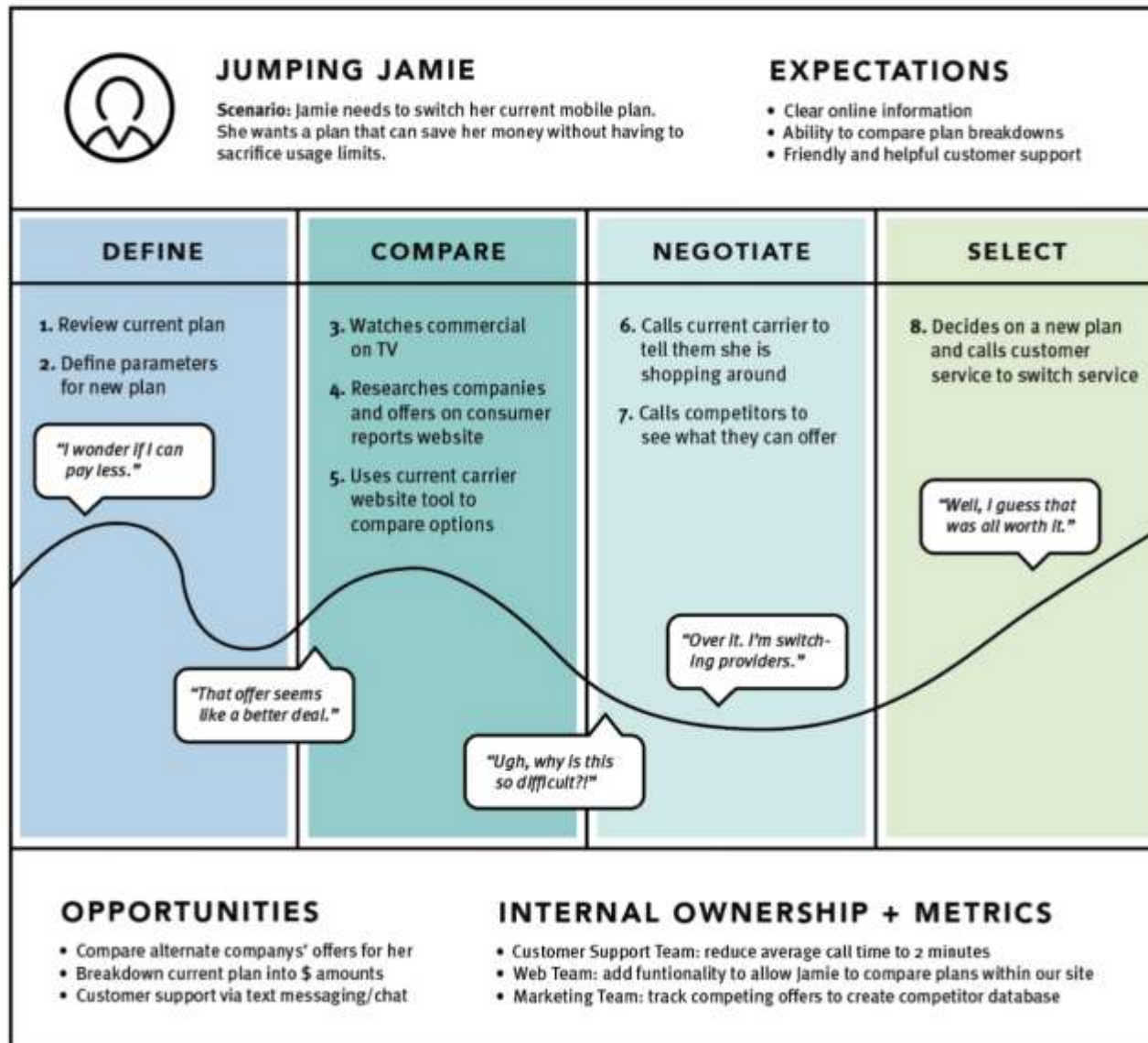
Actions, Mindsets, and Emotions

- Action: narrative of the steps

- Mindsets: users' thoughts, questions, motivations, and information needs; from Contextual Inquiry

- Emotions: a single line across the journey phases of the delights and frustration (current system issues from CI)

Opportunities

- What can change
- Who can change
- How will you measure improvement

CUSTOMER JOURNEY MAP *Example (Switching Mobile Plans)*

JUMPING JAMIE

Scenario: Jamie needs to switch her current mobile plan. She wants a plan that can save her money without having to sacrifice usage limits.

EXPECTATIONS

- Clear online information
- Ability to compare plan breakdowns
- Friendly and helpful customer support

DEFINE	COMPARE	NEGOTIATE	SELECT
1. Review current plan 2. Define parameters for new plan	3. Watches commercial on TV 4. Researches companies and offers on consumer reports website 5. Uses current carrier website tool to compare options	6. Calls current carrier to tell them she is shopping around 7. Calls competitors to see what they can offer	8. Decides on a new plan and calls customer service to switch service

"I wonder if I can pay less."

"That offer seems like a better deal."

"Ugh, why is this so difficult?!"

"Over it. I'm switching providers."

"Well, I guess that was all worth it."

OPPORTUNITIES

- Compare alternate companys' offers for her
- Breakdown current plan into $ amounts
- Customer support via text messaging/chat

INTERNAL OWNERSHIP + METRICS

- Customer Support Team: reduce average call time to 2 minutes
- Web Team: add funtionality to allow Jamie to compare plans within our site
- Marketing Team: track competing offers to create competitor database

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For class: use template

[Your Journey Map Title Goes Here]

Actor:
Persona
In a sentence or two, add context about this persona, so that someone reading the map understands who the map is about.

(Replace this icon with a visual representation of the persona the map is about)

Scenario:
What is this persona trying to accomplish?
Give context to this map—what is the persona's purpose and goal for taking these actions?

Goals & Expectations:
- List the goals and expectations of this persona.
- What do the persona want and hope for?
- What is success in the persona's mind?

Team:
Date:
Version #:

Phase Name & Goal	Phase 1	Phase 2	Phase 3	Phase 4
	Explain the goals (from the user's perspective) of phase 1 in a sentence or two.	Explain the goals (from the user's perspective) of phase 2 in a sentence or two.	Explain the goals (from the user's perspective) of phase 3 in a sentence or two.	Explain the goals (from the user's perspective) of phase 4 in a sentence or two.
Doing				
Thinking & Saying				
Feeling				
Oppotunities & Ideas				

Template at: https://bit.ly/journey-template-352

For class: use template

Margaret's Journey: Tracking Wellness One Step at a Time

	Actor:	Scenario:	Goals & Expectations:	Team:
	Persona: Margaret is a 67-year-old retired teacher. She values simplicity, clear guidance, and emotional support, often relying on her daughter for tech help and motivation.	**What is this persona trying to accomplish?** likes to maintain mobility and independence and use the app to not only track her daily goal, but also share her progress with her daughther	Margaret **wants** to walk more each day, track her progress easily, and feel supported by a simple and encouraging fitness app. She **hopes** for a tool that fits her routine, is easy to use without help, and helps her stay connected with her daughter. **Success** means Margaret consistently meets her walking goals, understands her progress, and feels proud and independent.	Date: Version #:

Phase Name & Goal	**Getting Started & Setting Goals** Margaret wants to set a new step goal that reflects her doctor's advice and feels achievable.	**Daily Use & Activity Tracking** Margaret wants to track her walks each day, whether automatically or manually, and feel confident that her efforts are being recorded accurately.	**Reviewing Progress Over Time** She wants to understand how she's doing over the week and feel reassured that she's improving, using visuals that are easy to interpret.	**Sharing & Staying Motivated** Margaret wants to share her progress with her daughter for support and feel encouraged by reminders or small celebrations from the app.
Doing	Opens the app from her home screen / Navigates to profile or settings / Taps "Set Step Goal" / Enters "6500" as her new daily step goal / Confirms the change	Opens the app after a walk / Looks for automatic tracking results / Taps "Log Activity" if nothing shows up / Manually enters walk details (time, steps, distance) / Saves the entry	Taps on "Progress" or "Dashboard" / Views the weekly step graph / Tries to compare daily bars / Looks for her average or goal completion / Wonders what some icons mean	Taps "Share Progress" or screenshots her chart / Sends the image in a message to her daughter / Receives a notification at the end of the week / Opens the app to check her walking streak / Feels motivated by small reward message
Thinking & Saying	"The doctor said more walking would help... how do I change my goal?"	"Did the app get my walk? Or should I type it in?"	"Am I doing better this week?" / "I want to show her I've been walking more!"	"I'm actually sticking with it. That feels good."
Feeling	😕 Confused, hopeful	😟 Doubtful, slightly anxious	😊 engaged, motivated, but unsure of progress	😊 Proud, validated
Opportunities & Ideas	Conversational Setup Wizard: A friendly, step-by-step guide that asks simple questions like "How active do you want to be?" to help set goals / Pre-filled Suggestions: Show 2–3 personalized goal suggestions based on age or past activity	Log My Walk" Button on Home Screen: A persistent, one-tap option that Margaret can find immediately. / Gentle Prompt for Missed Walks: "Did you go for a walk today? Tap here to log it	Simplified Visuals with Labels: Replace abstract charts with clearly labeled "Goal met"/"Almost there" icons. / Audio Summary Option: Offer to read the weekly summary aloud.	Family Sharing Shortcut: One-tap sharing to a preset contact (e.g., "Send to Daughter") / Social Encouragement Loop: Let family send simple emoji responses or encouraging messages back.

Template at: https://bit.ly/journey-352

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Next week

Design & Ideation