

DIY User Personas

Probably you already know what a persona is –if don't [check this](#) -, and probably you, like me, **build your first persona using some of the thousands personas layout you can find in the internet**. But as has happened to me **you've probably also discovered this is not easy work...**

But you know, I love recipes, so **here you have my own recipe to build user personas, step by step** including 10 elements your persona should have.

I create this guideline with the purpose to **make the process of create personas a simple fill in the blank work**, so I think could be useful for you too. Let me know!



The guideline it is structured in 3 points:

1. **How to**, with the step by step guide and the Interviews process.
2. **Layout**, presenting the persona layout I use with 10 basic elements.
3. **Elements** were I describe in details each one of the elements of the layout and the method used to obtain the information and measuring.

Each point follows a *What? Why? and How?* logic to make it even easier.

1. HOW TO

1.1 Step by step (Modeling personas)

What?:

“The personas are archetypes built after a preceding exhaustive observation of the potential users” (UCD method)

A persona should include:

- Social and demographic characteristics.
- Needs, desires, goals
- Habits (consumer habits, behavior)

- Expertise
- Cultural background
- Motivations
- Must do, must never
- User experience goals

Why?:

Any product should have personas!. It is the most basic tool for design experience. **Key to identify our real users profile, needs, wants, expectations** and end up with a product/service user-oriented.

How?:

One persona is build based on several sources information: interviews with real users, analytics, marketing, customer care, etc. **Bellow you have a suggested step by step path for build your persona.** Recently reading Lean UX method discover and alternative path to traditional User Centered building personas method, but here I will explain only the method based on traditional UCD.

Step by Step: 'Building your User Persona'

1. **Collect information from all sources.** Interviews with stakeholders who possess information about final users (User Experience team, Marketing, Data Analyst, Product Owner, Product Manager, Customer care, etc.)
2. **Create a initial spectrum of potential users** (Based on information of point 1) this will help you not leave out important actors for your product/service.
3. **Conduct several real users interviews selecting participants that match the initial spectrum** (sample will depend on the number of role identify in point 2) additionally you could use remote surveys. *In next point you will se some interviews tips.*
4. **Seeks patterns.** Split interviews and research data into sociodemographic data, motivation, skills and proficiency, personality, etc. **Do you spot a trend or pattern?. What is the most determinant variable?.** Use this variable to define your groups. For example depending on the product one key variable could be the proficiency on computers, while in another case may be some lifestyle characteristic.
5. **Create various possible scenarios for your Personas** (Using information coming from analytics or product-logs and persona motivations, lifestyle, needs, etc.) *Alternatively define User Roles related to the Persona.*
6. **Test Persona – scenario – Product/service relationship:** What are the major problems, limitations, opportunities of our product?. Discuss results and proposal with your team and

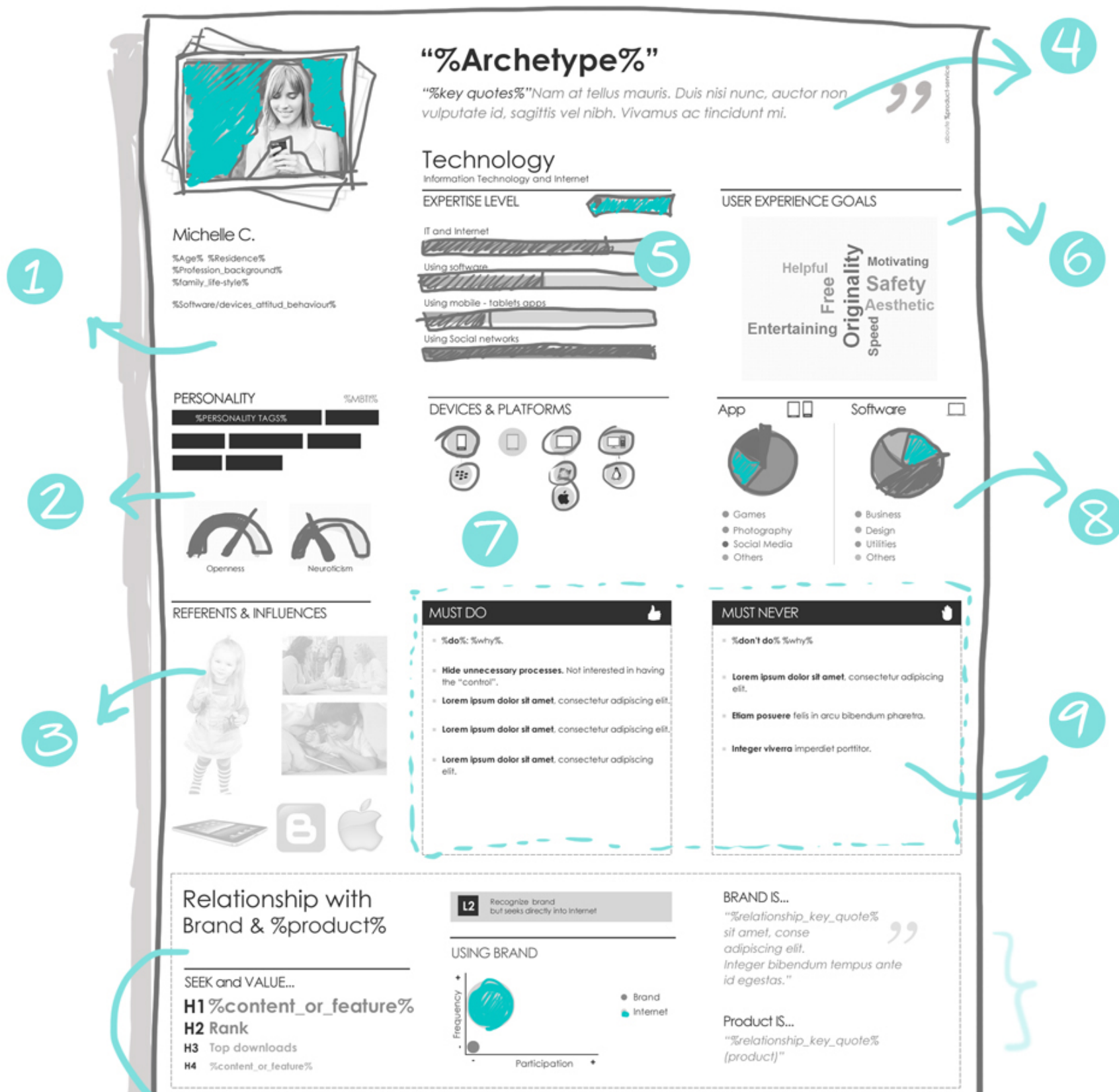
stakeholders. Do the necessary adjustments.

7. **Remember always use the minimum number of personas for each product**, this will help to make your product more accurate. In case to have more than one persona define the *Primary persona* (the most relevant) with stakeholders.

2. PERSONA'S LAYOUT

Here I will present the layout with the 10 elements I use at work. This layout has emerged from an analysis of many persona's layouts and selection of the main elements we consider most useful for working. In next point 3 (*elements*) you will see which method to follow in order to fill in each one of the elements of the user persona's layout.

10 elements for User Persona





- | | |
|---------------------------|----------------------------------|
| 1- Profile | 6- User Experience Goals |
| 2- Personality | 7- used device and platforms |
| 3- Referents & Influences | 8- Domain details |
| 4- Archetype & quotes | 9- Must Do - Must Never |
| 5- Technology expertise | 10- Brand & Product relationship |

User personas design, 10 elements of User personas

**The original basis for this User Persona layout is a team-work developed with my colleagues: Gerard Adell, Roger Espona and Ignacio Pastor.*

3. ELEMENTS of User Persona's layout

Now is time to fill in all the different elements of each persona. The purpose of this guideline was create some method that could be apply for different people in the team to create their personas, so we could somehow **guarantee we are using a common approach**, not only in the visual aspect, but also, and more important, that **we are measuring the same in each case and for each element on the layout**. So, next you will find each layout's element described in details with all the variables included.

3.1 Profile:

What?:

This module combine Psychographic, Demographic and Geographic profile and Behavioral profile.

Variables Guideline:

Demographic profile: Like: Age, Gender, Family size, Income, Occupation and Education.

Geographic: Where do your personas live and work?. What's it like there? (It is a small or a cosmopolitan city?)

Psychographic profile: As Social class, Lifestyle, Activities, Opinions, Motivations and Personality

characteristics (see 3.2)

Behavioristic profile: It is a common marketing segmentation but we included other areas more related with the product/service, like **User Type** (Base on user knowledge, attitude and skills in this case about technology proficiency) and **Customer behavior toward product** (relationship with our products)

User type: E.g. Inexpert, Medium, Advanced, Expert. (See 3.13 User type)

Customer behavior toward products. Usage rate, Brand loyalty, User status: potential, first-time, regular, etc, Readiness to buy, Benefits sought, Etc. (See point 3.11 Relationship with...)

Persona's Name: Give your persona a name. Use only name and initial of last name. Persona name help to use this type of statements during design process:

“This idea would work for Ken, but not so much for Diana”

“Would Joan understand what is happening here?”

Why ?:

- Quick read: help any reader to understand persona's background, personality and lifestyle in just a few lines.
- Narrative style allow easy reading and stickiness.
- This basic profile is share with mktg. department segmentation and is a type of content all stakeholder is used. (common language)

How?:

Write short paragraphs in a narrative way (story based) that resume key points for understand persona life-style, background and motivations.

3.2 Personality

What ?:

Personality it is a conflictive module seems exist a lot of research models and discussion about this. In order to apply a modeling that have sense for our daily work and in agile methodology, I propose a combination of two well know personality modeling: The **5 Factor model** (also know as Big Five) and the **Myers-Briggs Type Indicator (MBTI)** based on C. Jung Personality types.

To details about how to outline personality read my post [about using MBTI](#) and 5 Factors Model.

How?:



User personas, Calculating personality, BigFive, Myers-Briggs Type Indicator

Based on real-users interviews use: self-reported, in-line reading, behavior and body language to calculate a ruge MBTI type and the corresponding value for the two Big Five variables used.

- a- For tagging personality using MBTI we first apply a basic questionnaire. (See post about MBTI)
- b- Include “Big-Five Openness and Neuroticism“ score. **Remember Openness is an inverse scale, low Neuroticism it is positive, when high is negative.**

3.3 Referents & Influences

What?:

Represent: People, brands and product that influence his relation with key indicators for your product/service. *For example: internet, computers and other devices, software and app.*

References: Who? People, sites, brand or products become a referent point regarding to key indicators to you product/service. *For example technology and software.*

Influences: Who? (people, site or brand) influence his decisions about key indicators for your product/service. *For example, technology and software.*

Why?:

Quick understand persona influences and referents, background expertise, and lifestyle.

How?:

Use images to illustrate this variables. This make information more visual and easy reading.

For example:

- a- Children: Clare have two children, most of the apps she try are games or activities for them’.
- b- Friends: Most apps recommendations come from Clare’s friends during a coffee break.
- c- IPAD: This is the most used device by Clare. Shared with her children, it is a family device.
- d-Blogger: Clare has a blog where she writes about personal interest.



3.4 Archetype & Quotes

What?:

Archetype it is an attempt to a main classification of user using various information, as Personality, Background, Proficiency, Behavior, User experience goals, etc.

The archetypes should change depending in your product/service domain, but in the example above, for example we suggest this 8 archetypes:

Why?:

Archetypes help you to cluster similar personas.

How?:

You will need to define archetypes based in your product/service. Take a look to [Microsoft’s study on Multi-screening](#) to see some example archetypes.

Key Quote below archetype

What?:

The key quote simulate a Persona’s comment. Pretends reflect behavior or persona attitude as user. *What did he expect, afraid or wants?.* Could be general or product-related.

Why?:

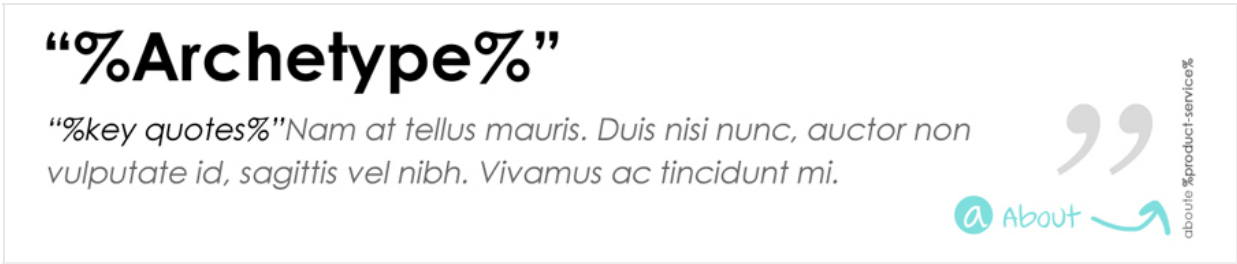
A simple sentence that suggests “the user voice” gives impact and “veracity” to our person.

How?:

Use interview data. You can combine several real user interviews to create one quote, but try to keep the comment the most realistic possible. Only combine similar user-type and personality.

Select quotes that you consider key or most relevant. Depending on the persona characteristics (E.g. archetype and personality) fears may be more relevant than the desires, for example.

Finally add a note for indicate if persona was referring to Brand or to a specific product.



3.5 Technology Expertise (Proficiency level)

What?:

This element will change depending on the domain of your product. In this layout example ICTs proficiency is a key variable to understand our users.

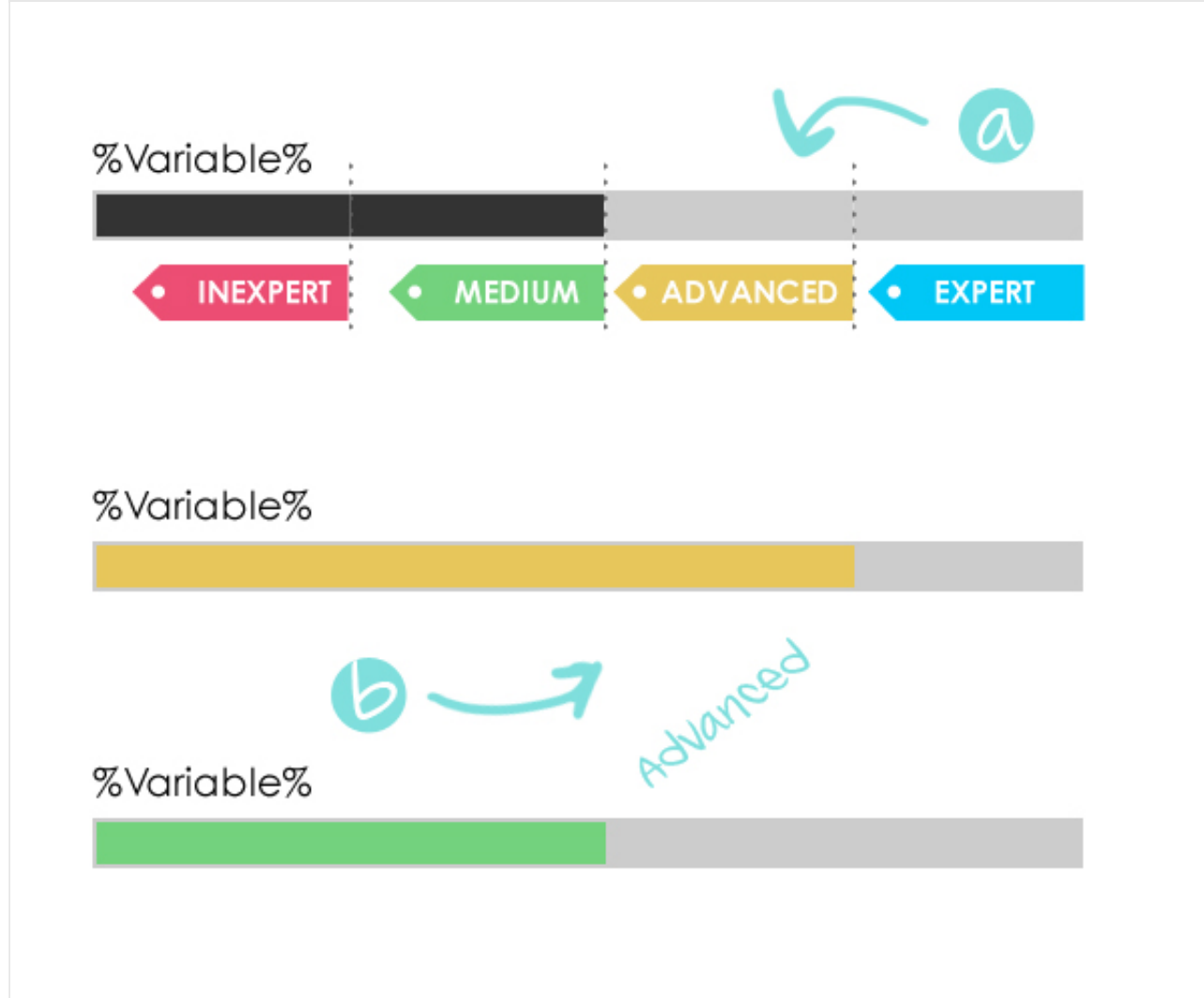
Why?:

This graphic representation of proficiency by domain help any reader to easily understand the persona expertise level.

How?:

First, select the variables you want to represent depending on the product/service domain. In the example we use: It and Internet / Using software / Using mobile -tablets apps / Using social networks but depending on the product related you could need to use different variables.

We split expertise as a progress bar with 4 levels. Going from inexperienced to expert users type.



3.6 Experience Goals

What?:

User experience is what the interaction with the system feels like to the users (subjectively). Some authors define Experience Goals as **user’s priorities and expectations** and others use Experience Goals to reflects **how user feel when interact with the product**.

When select experience goals for you persona try identify which of them seems most relevant or priority for that persona.

Experience goals can be define in general way or as product-related:

E.g:

General: *having fun, not feeling stupid or don’t waste time.*

Product related: *feel confident and secure with the transaction* (Ej. persona using a online banking)

Why?:

User experience goals help us to prioritize user interest regarding to interactive systems, this could be use for take interaction design decisions or as determinant for adding a new feature.

How?:

Use interview and survey information to define a set of most significant User Experience Goals from your persona point of view.

In this layout I use TagCloud to visualize the key UXGoals by hierarchy.



3.7 Devices & Platforms

What?:

This module reflect devices and platforms persona uses. Depending on your product/service domain this module might not be relevant.

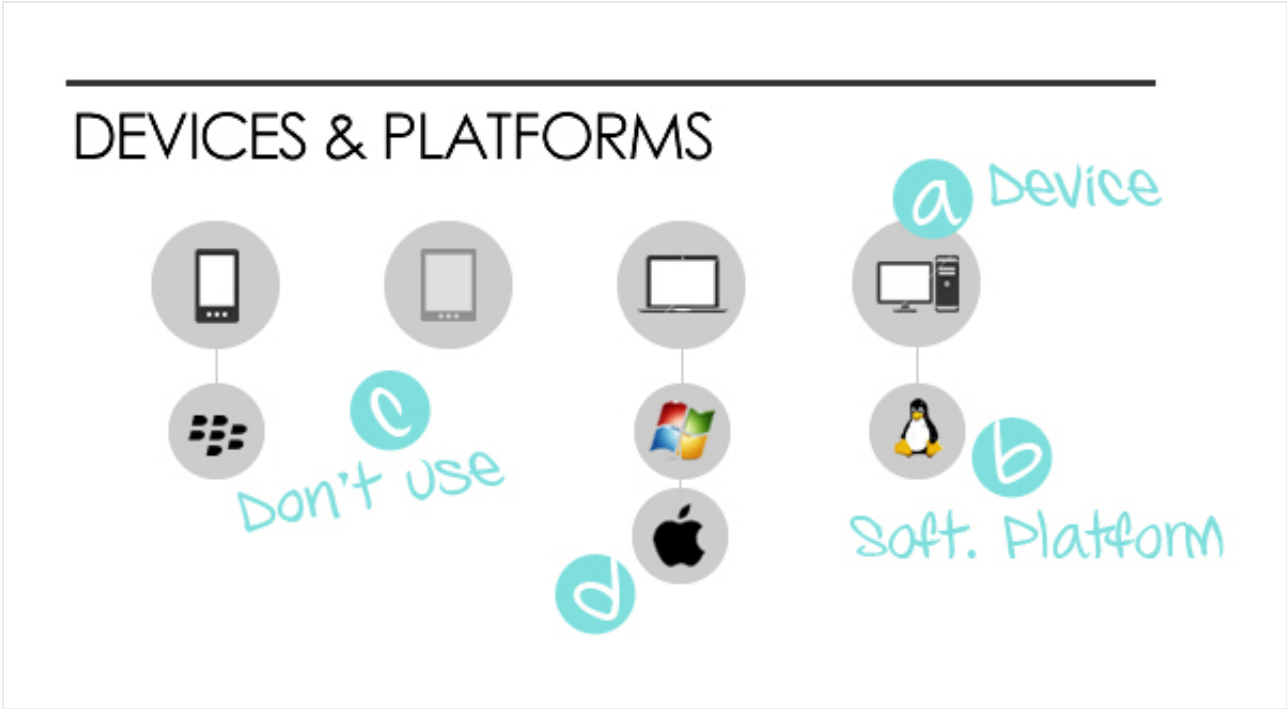
Why?:

In the case of a software product this module allows to quickly understand persona skills and habits related with devices and technologies and possible expectations. E.g. What devices have? Is Mac or PC user?.

How?:

Define the variables relevant for your product/service.

For this example, we use: Device and Software Platform.



3.8 Domain details: Used Software / Apps*

What ?:

This element also should change if you are building personas for a different domain, in this example the persona belong the software domain, but you should replace for any other related to your own company/product domain.

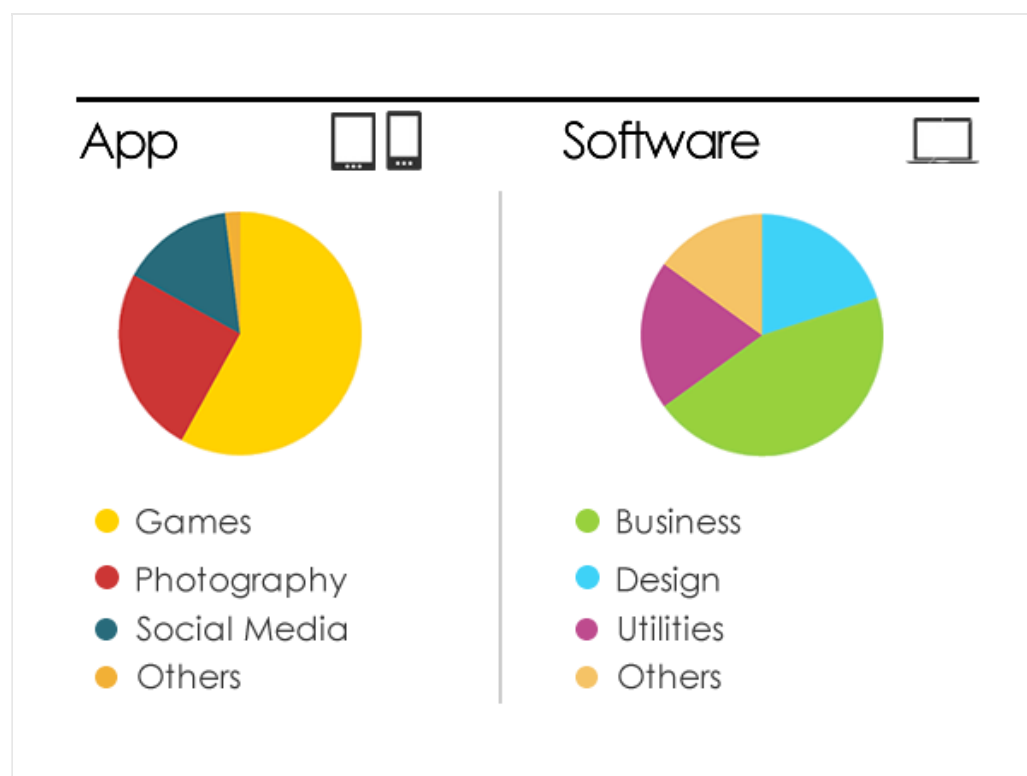
In the example this module reflect persona software/app **consumer habits**.

Why?:

It allows us to understand the interests and habits of the user as software consumer for their main devices.

How?:

We use Pie chart to present most used software-app category.



3.9 Must Do / Must Never

What?:

Must Do and *Must Never* are basic guidelines for interaction and experience. Include what persona expect and want (must do) and what frustrates him and annoys (must never).

This module mix all persona's elements: **Personality + proficiency + User Experience Goals**. Basically it is about put in context or in a specific scenario the User Experience Goals adjusting to his personality and experience.

E.g. : We include "Ease of use" as a Experience Goal of this persona (see 3.10) then one "Must do" tip arising from these could be:

*“Hide unnecessary process. This persona is not focus in control but in facility” (**Interaction**)*

*“Need clear text-blocks with more important concepts. Feels overwhelmed with information overload and complexity” (**content**)*


Why?:

- It is a quick tool for design decision making.
- is easily actionable information

How?:

Build the MUST DO / MUST NEVER sentences following the “what” example. Use MUST NEVER to sentences with stronger emotional effect.

Structure: sentence is compose from a bold phrase (Do / Don’t do), for specific action and a normal text sentence for resume the reason why (why).

MUST DO 	MUST NEVER 
<ul style="list-style-type: none">■ %do%: %why%.■ Hide unnecessary processes. Not interested in having the "control".■ Lorem ipsum dolor sit amet, consectetur.■ Lorem ipsum dolor sit amet, consectetur adipiscing.■ Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<ul style="list-style-type: none">■ %don't do% %why%■ Lorem ipsum dolor sit amet, consectetur adipiscing elit.■ Etiam posuere felis in arcu bibendum pharetra.■ Integer viverra imperdiet porttitor.

3.10 Relationship with the brand and the product

What?:

This module reflect the persona relationship with brand and/or specific specific product.

The module include 4 areas:

a- **Seek and Value:** Most seek and value content or functionality from our brand (or competitor) for that persona.

b- **Level of user:** Brand-persona relationship (In the example we define 3 levels):

Level 1: Do not know the brand or use our products.

Level 2: Recognize brand but seeks directly into Internet.

Level 3: Know and actively use our products / services.

c- **Bubble graph:** Two axes in this case *participation* and *frequency*. Where **participation** indicate **how much active it is the persona** (write comments?) and **frequency** reflects **how often persona visit our brand site**, for example. **Depending on the product this axes could change for reflect another important KPI.**

Other KPI could be:

- Brand loyalty
- User status: potential, first-time user, regular, etc.
- Benefits sought,

d- **Relationship Key quote:** A brief quote that reflects persona relationship with our brand or product (love it, hate it?, etc).

Why?:

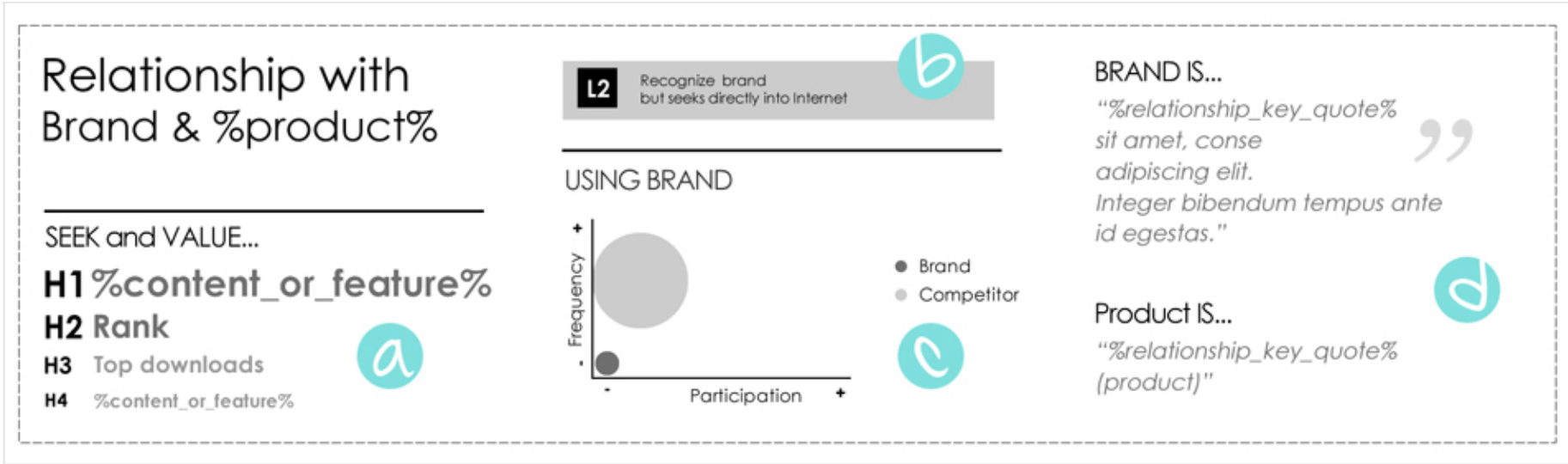
Resume one useful marketing segmentation: Behavioristic segmentation.

How?:

a- **Seek and Value:** Select top **content** or **functionality** for user and organize them by relevance from top to bottom.

b- **Customer type:** Select the level and copy description following template.

c- **Bubble graph:** Circle size reflects how much persona use our brand products or competitor. Then locate bubble in the corresponding position of axis x or y depending in the frequency of visit and how participative the persona is (comment, review, rate, etc).



CONCLUSION

As you have seen this layout includes elements you should change in order to fit the corresponding domain of the product / service for which you create the User Persona. However I think that based on this example, you do not find it difficult to replace them for others relevant to your product.

References and recommended reading:

Personas:

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