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EMERGING TECHNOLOGIES

Matthew B. Hoy and Tara J. Brigham, Column Editors

Personas: Stepping Into the Shoes of the Library User

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Personas are researched-based user archetypes which can help uncover gaps, highlight new opportunities, and inform the functionality of a space, resource, or service. Personas are a useful tool for organizations, such as libraries, which are interested in improving the user experience, since they tap into users' expectations, behaviors, and attitudes. This column will explain what personas are, the advantages and disadvantages of using personas, and where personas are used. A list of resources for exploring and creating personas is also provided.

KEYWORDS *Personas, user-centered design*

INTRODUCTION

How often do library staff place themselves in the position of a library user? Poorly designed resources, services, or spaces often result in user frustration or worse, the resistance even to use the library. As an example, if library users struggle to find what they are looking for on the library website, most likely they will abandon the search. As Dr. Jakob Nielsen succinctly put it, “on the web, if a site is difficult to use, most people will leave.”¹ Instead of

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assuming what library users need, many libraries are now involving users and recognizing the importance of user-centered design, testing the usability of the library's resources and improving the overall user experience. One of the tools that libraries can use to create a better user experience, not only on the web but also in the library, is user-based personas.

WHAT ARE PERSONAS?

Personas are user archetypes based on ethnographic data and, when used properly, can improve the user's experience of a product or service. Although there are some variations on this definition, all agree that personas are strongly based on data from user research. Data can be gathered a number of ways, such as conducting usability testing or one-on-one interviews with users. The creation of personas are "data-based" not "assumption-based." Another way to think about personas is that they are character profiles that represent a group of actual users, but they are not real people. Personas contain names, personal details, and sometimes a picture to make them more realistic. They also usually describe behavioral patterns, goals, skills, and attitudes. The data are then captured in a short, one- to two-page description (see Figure 1). Typically personas are created by organizations or companies to elevate the overall user experience. Over time, personas have become a broad concept that is helpful in a number of fields. They are used not only in marketing and website design improvement but also to gain insight into how to assist those with disabilities.

ADVANTAGES AND DISADVANTAGES

It is impossible to design a product or resource that will meet the needs of everyone, but with persona-based design there is greater opportunity for success and to satisfy the needs of a few, specific users.² The roll-abroad suitcase could be used as an example because it was developed to meet the specific needs of a flight attendant and ended up meeting the needs of the general flying public as well. Since personas are based on data-driven research, they can also help library staff determine priorities and goals without bias or based on assumptions. Another advantage to creating and using personas is that they remind library staff that the focus is on the user and not themselves. Most individuals are not naturally inclined to focus on someone else's needs. There is no way for library staff to be the user; they can only pretend to do so. Personas can help designers or librarians avoid self-centeredness and focus instead on user-centeredness. They can also help create a deeper understanding and empathy for the user. All of these factors can contribute to a better user experience and increase the usability of services and products.

Sandra - Physician, M.D.

At a glance

Age	32	Gender	Female
Years at Mayo Clinic	13	Patient facing	75%
Years in current role	13	Hard to keep up with information	Moderately
Interest in institutional information	Medium		

Job overview

Sandra, M.D., has a busy clinical practice and is scheduled with outpatients the majority of the day. She also is newly appointed to her department's education committee and assists with clinical reviews for residents and fellows. She helps a colleague collect data for a research clinical trial, and was recently asked to assist with a practice improvement initiative.

On a day-to-day basis, Sandra works with a multidisciplinary team, including nursing staff, appointment/desk staff, secretaries and others. She manages many patient care and documentation responsibilities herself, which takes the majority of her time. Sandra is curious, creative and eager to learn from and share with colleagues across the organization.

Additional duties

Sandra serves on her department's education committee to provide input to the resident and fellow training program and assist as a faculty member. She also works on clinical research projects, although they are not her main focus. She is often tapped for ad hoc projects within her department due to her hands-on clinical knowledge and her desire to improve the practice.

Sandra's main goals

- Make a difference by improving the lives of patients



Typical job titles

- Consultant

- Daily Life
- PsychoEmotional
- Use of Information
- Use of Technology
- Relationships

Major workflow

Patients are scheduled every 30 minutes, and Sandra generally sees 8-12 patients each day. Her appointments start by reviewing the patient-provided information and previous electronic medical record information or scans. She then examines the patient and visits with him or her to determine if the diagnosis from the referring physician is appropriate. She then explains to the patient and family the condition, educates them on treatment options and answers any questions. Finally, she creates orders for the patient and puts her documentation in the medical record. While moving between exam rooms, Sandra quickly checks her email on her iPhone, responds to a page from a colleague and calls her secretary to draft a letter to a referring physician.

Lunch is often spent in a meeting with an education committee or attending Grand Rounds and is often interrupted by a page from a nurse with a patient question. On her way back to see patients again in the afternoon, she is stopped by another physician and has a quick hallway conversation about the research they are working on.

After Sandra's last patient appointment, she returns to her office to catch up on email, call a patient back and ask a more senior colleague for advice about a patient she is seeing. When her 30-hour day is complete, she heads home. Once home, she continues to check her email on her iPhone and often logs in via VPN to work on committee work and resident reviews after her children head to bed.

Schedule

Her day is tightly scheduled with patient appointments.

Workspace

She has her own office, but shares spaces when seeing patients.

Computer

She has his own computer, but uses a shared computer when seeing patients. She also has a laptop for use at home.

How Sandra stays organized

- Medical secretary helps her manage her calendar for administrative purposes
- Clinical assistant and appointment coordinator help keep her on track with the patient schedule
- iPhone helps her stay on top of email and administrative meetings

Main forms of communication

- Email
- Phone/pager
- Informal, face-to-face communication with support staff, care team and colleagues

FIGURE 1 Mayo Clinic physician persona, from the Mayo Clinic persona project. Used with permission of Mayo Foundation for Medical Education and Research (color figure available online).

One disadvantage to personas is that they can risk stereotyping the user.³ However, many argue that a persona archetype is used to inform, and stereotypes are used to demean. Another issue relies upon how invested the organization is to understanding and using the personas it has created. The persona descriptions must be believable and functional.² Finally, personas can be used inappropriately, resulting in a waste of time and resources. Two concerns should be addressed when using personas: 1) limit the length and number of personas created and 2) make the personas realistic, but remember that they are a first and foremost a design tool.

WHERE ARE PERSONAS USED?

Business

In the business world, personas are used mainly to improve the customer's or user's experience and for marketing purposes. Most credit Alan Cooper for first envisioning the use of personas as a practical communication and design tool in the early 1980s for computer software. His 1998 book *The Inmates Are Running the Asylum* brought the persona concept to the masses where they gained popularity in the software industry.⁴ Microsoft, IBM, and Scribe Software are just a few of the companies that use personas to influence software product design and application.^{5,6} By using personas to improve software design, companies are betting that more customers will buy their product.

Personas are also used to improve the customer's or user's experience on a business website. The application of personas in the improvement of website design was a natural transition from their use in software design. Businesses such as QVC, Discover Financial Services, Staples, Thornburg Mortgage, and the BBC have all used personas to improve the design and functionality of their websites.⁷⁻⁹ Over time, Cooper's message and vision of personas has trickled into fields such as business marketing.

It is no surprise that the use of personas quickly caught on in marketing firms and departments. Personas expose target customers and ways of how to connect with them.¹⁰ Marketers also use personas to help businesses determine the preferences of their customers. These preferences shape the development of certain products, services, events, and even persuasive messaging. Some examples of companies that have used personas to market products or services to their customers include Apple, Ford, Zipcar, JetBlue, Daimler Chrysler, and Procter & Gamble.^{11,12}

Medicine

Personas are also being used in the field of medicine. Projects using personas range from how medical devices are designed to improving patient

handovers to understanding generational differences in health care staff.^{13–15} As more health care organizations pursue eHealth initiatives, user-centered design tools such as personas could become more prevalent.¹⁶

Certain segments of the population could benefit from the application of personas in the field of medicine, such as the elderly, individuals with chronic diseases, and those who are disabled. By using personas to gain insight into the daily life, capabilities, and attitudes of various patients, health care professionals can provide better care. A few studies have looked into designing consumer health technologies or eHealth resources specifically for the elderly by using personas.^{17,18}

There have also been a couple of projects where personas were developed for individuals with disabilities. The AEGIS project developed a number of personas to assist information and communication technology designers and developers in the creation of products or resources that are accessible even to those with disabilities.¹⁹ Similarly, a project of the Rehabilitation Engineering Research Center on Mobile Wireless Technologies for Persons with Disabilities (Wireless RERC) developed personas depicting the characteristics of users with disabilities.²⁰ The goal in creating personas based on data of elderly or disabled individuals is to develop technologies or eHealth resources that these patients would actually be willing to use and which, in turn, could empower them to take a proactive role in managing their health.

Libraries

Beginning in the late 1990s, personas gradually made their way into libraries. Some examples of how various libraries have used user-based personas include:

- selection and implementation of a Discovery Tool (Johns Hopkins University);
- planning space and services (North Carolina State University Libraries);
- designing or redesigning a website (Stanford University Libraries, Cornell University Library, North Carolina State University Libraries, University of Toronto, The National Archives, UK); and
- improving various library user experience projects (HathiTrust Digital Library, North Carolina State University Libraries, University of Michigan, University of Washington Libraries, Wayne State University Libraries).

Since the purpose of a library is to provide space, services, and resources to various groups of users, it makes sense for libraries to seriously consider the creation and use of personas. Particularly in a time when some question the validity of a library, engaging the user could prove to be beneficial. Personas can harness the insights, habits, and attitudes of library users, which will allow library staff to better understand the needs of its users. Addressing

the needs of the library user will reflect the attentiveness and responsiveness of the library staff. It will also mean the improvement of library services and usability of library resources. Finally, if library staff focus on the improvement of the user experience, it might even persuade library users to utilize the library more often.

CONCLUSION

The most compelling reason to use personas is to improve the user experience. Since personas are firmly based on research data, creating personas requires diligence and an unbiased perspective. Personas can assist library staff in gaining insight to what users need and want. This can not only help improve the library's services and access to resources but also might also create loyal library users. While there are positives and negatives to the use of personas, their acceptance and use in libraries seems to be promising.

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