Interaction Design (CM3055)

Persona

What | Why | When | How

What are personas?

- Fictional, yet realistic, description of a typical or target user of the product

- An archetype instead of an actual living human, but personas should be described as if they were real people.

- Personas Are Not User Groups - Defining user groups or market segments is not the same as creating personas.

  A persona is a singular user derived from these data ranges to highlight specific details and important features of the group.

- Description should be thorough, including details about the persona's needs, concerns, and goals, as well as background information such as age, gender, behaviors, and occupation.

Image from smashingmagzine.com

"I'm looking to join the right company that challenges me and allows me to grow and develop my skills."

"I crave variety in the types of industries and goals of each content project I work on. I need to ensure I won't get bored."

Company "Investigator"

Rosa Cho
Content Strategist, Freelance

Age: 34
Location: Seattle, WA

About Rosa

Rosa does not believe in settling. She won't settle for a job with a company that isn't as innovative and cutting edge as she believes she deserves. She wants to get the most out of every professional experience, and before moving to a new position, Rosa investigates every angle of aligning herself with a company.

Behavioral Considerations

+ Expects the site experience to reflect the business's culture and values
+ Interested in career opportunities within the organization that fit her career goals
+ Thoroughly compares multiple companies with similar opportunities
+ Is interested in the unique benefits of working at a company, including cultural elements, mentoring programs, and continuing education policies
+ Needs to be confident the company has innovative products that will be interesting to work on
+ Needs to know company has reputable partners and customers

Frustrations

+ Thinks that too many companies have career sections that just talk about open positions but not why she would actually want to work there
+ Would like to challenge herself and have a more stable job, but is comfortable as a freelancer and wouldn't stop for just any job

Goals

+ Needs to see reasons why a company is interesting: has it won awards, had intense growth, won big contracts?
+ Wants to figure out how to get in touch with someone at the company to explore opportunities further

Tasks

+ Learn about current customers and success stories
+ Read press releases about recent big contract wins and other accolades
+ Read about culture, benefits and perks, and the people that work there
+ View job openings and apply

Example of a persona, targeted at helping design the About *and* Careers *content for a company website.*

@nngroup.com

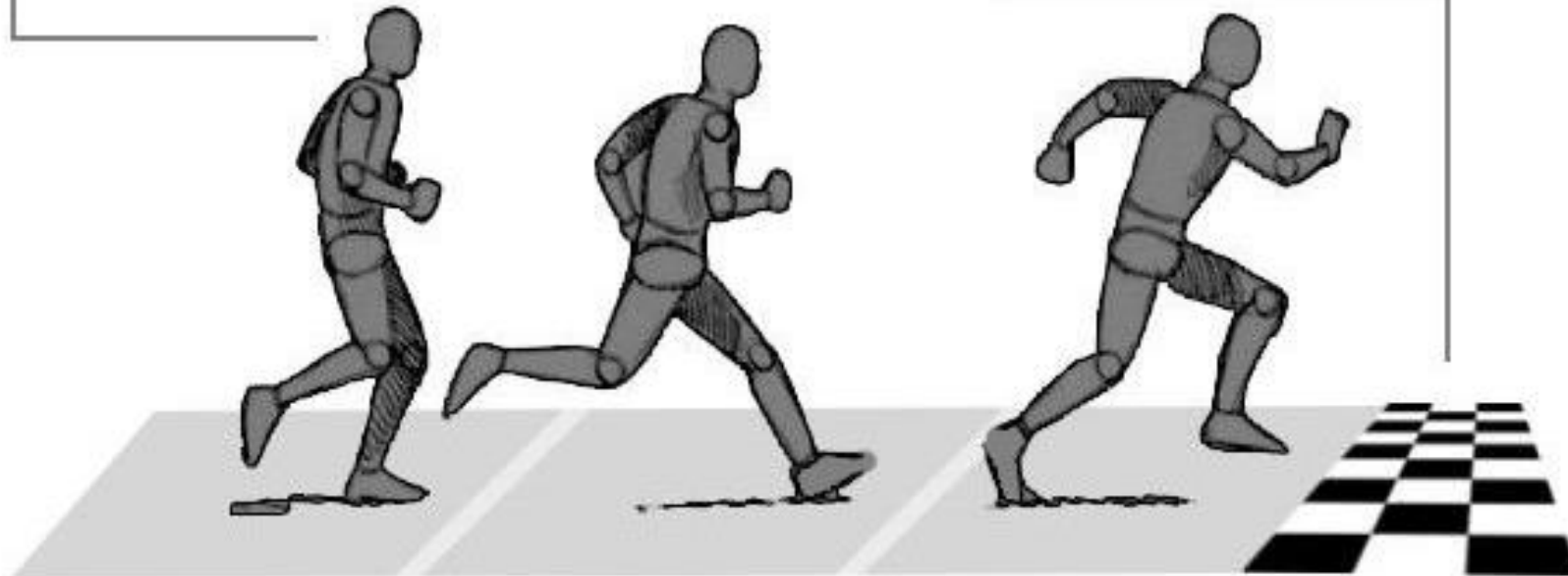**Why are personas important?**

Personas help to build
empathy and **understanding**

1. Persona

Defines who the story is about. This main character has attitudes, motivations, goals, and pain points, etc.

3. Goal

Defines what the persona wants or needs to fulfill. The goal is the motivation of why the persona is taking action. When that goal is reached, the scenario ends.

2. Scenario

Defines when, where, and how the story of the persona takes place. The scenario is the narrative that describes how the persona behaves as a sequence of events.

https://www.interaction-design.org/literature/article/personas-why-and-how-you-should-use-them

When do we create personas?

- "As early as possible" is the best guideline for when to create personas.

- **Personas to be based on user research** in order to be at all accurate and representative of actual users of a product.

- Personas are made-up people, but they should be made up based on information about real people.

  (Imaginary-friend personas that you dream up without any basis in the real world may describe the users you *hope* to get but will not reflect the way people actually are. Design for somebody who doesn't exist and you'll have no customers.)

When do we create personas?

- **Persona-creation process** should be **a part of the research phase** for a product or feature, before the actual design process starts.

- Field studies, surveys, longitudinal studies, interviews, and other methods of user research should be conducted first to define characteristics of typical users.

  (Keep in mind that any self-reported data, such as that resulting from focus groups and surveys, is possibly misleading and should be verified through other methods.) Once user research has been completed, personas and scenarios can then be derived from that data.

Common pieces of information to include in a persona

- Name, age, gender, and a photo

- Tag line describing what they do in "real life"; avoid getting too witty, as doing so may taint the persona as being too fun and not a useful tool

- Experience level in the area of your product or service

- Context for how they would interact with your product: Through choice or required by their job? How often would they use it? Do they typically use a desktop computer to access it, or their phone or other device?

- Goals and concerns when they perform relevant tasks: speed, accuracy, thoroughness, or any other needs that may factor into their usage

- Quotes to sum up the persona's attitude

How do we create Persona?

3 Steps to Persona Creation

1. Collect & Organize Data/Information

2. Identify Patterns

3. Make it Complete

1. Collect & Organize Data/Information

a) Ad-hoc Personas (provisional personas)

- not based on direct data
- to get an understanding of the users and to prepare the line of questioning for the interviews.
- Research, look through reviews, types of uses of existing products

b) Field studies, surveys, longitudinal studies, interviews, and other methods of user research

2. Identify Patterns

a) Behavior 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 (i.e.; Goals)
Why the user is engaged in the product domain

Skills
User capabilities related to the product domain and technology

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*
Tracks clients manually vs. digitally	Difficult to get clients	Experienced trainer vs. inexperienced trainer	Wants to be organized	Experienced user vs. Nonuser
Works in corporate vs. private	Difficult to individualize plans			
Sees clients frequently vs. infrequently				
Constructs				

2. Identify Patterns

b) Map Variables

Look for clusters that occur across multiple ranges

Similar clusters across 5 or more variables will likely signify a significant behaviour pattern that will form the basis of a single persona

Correlation does not imply causation.

3. Make it complete

a) Synthesize Characteristics

- Briefly **jot down characteristics relating to goals, frustrations or pain points, the use environment,** and other relevant information that would relate to the eventual product use

- name your personas using an alliteration format that relates to the type of user your personas is.
  e.g. Chrystal the Corporate Trainer and Paul the Private Trainer

Chrystal the Corporate Trainer
Cluster 1 & 3

- Works for corporate gym
- Typical work hours are from early morning to late afternoon
- Client files are kept as hard copy paper files
  - Frustrated with the disorganization and time consumption of this
- Meets face to face with clients
- Will regroup with clients after their sessions to discuss progress and next steps
  - Frustrated that this can be cut short to attend to other clients
- Meets with a supervisor to know if assigned new clients
- Communicates with clients through

Paul the Private Trainer
Cluster 4 & 5

- Works privately/self-employed
- Typical work hours are from early morning to late evening
  - Will leave in the middle of the day to go home to spend time with family and work
- Client files are tracked using an app
  - Frustrated that app does not have a web component
- Meets face-to-face and virtually with clients
  - Frustrated with ensuring virtual clients understand exercises
- Has to schedule own clients
- Directly processes payments from clients

3. Make it complete

b) Expand Descriptions

- Expand the description of your personas by creating a narrative that is 1–2 pages in length

- The vast majority of your narrative should be backed by the information gathered from your interviews

- Include images, add demographic information

Paul the Private Trainer

Location: In person & virtual training
Relationship Status: Married; two kids

Goals

- "I want to be able to separate my business from my personal life"
- "I want to make scheduling my clients easier"
- "I want to be able to hold my online clients more accountable"

Frustrations

- "It is difficult to transfer information between my computer and my phone"
- "Having to depend on my clients to remember to pay me frustrates me"
- "It's very challenging to market myself and recruit clients"

About

Paul is a private personal trainer that has in person clients. He begins his day early in the morning and usually leaves his house before his children are awake. He meets with his first client at the gym he rents out and continues to have clients until mid-day. He will return to the gym at 6 for his evening clients and leave at 10.

During 1-5, when he has few clients, Paul will go home to work on the computer and be with his family in the evenings. Paul strives to maintain that section of the day clear from clients so that he can focus on his family. He also uses that time to check on his marketing avenues, recruit more clients, and contact his online clients.

Paul uses an app to track and manage his clients. The app allows him to create workout plans and nutritional guidelines. He likes that the app allows him to see when his clients complete a workout and what they eat. He also likes that the app allows him to upload videos for his clients to reference, especially his online clients. He does not like that the app does not have a web component to make creating workouts easier.

When it comes to his clients, Paul endeavors to have them achieve their goals in a safe but efficient way. He accomplishes this by demonstrating movements to his clients and then watching them complete the movements; adjusting and correcting if needed. He finds that this is lacking with his online clients and sometimes has to verbally walk them through the movements if the videos are not enough.

10 Steps to Personas

1. Collect data

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

Methods used
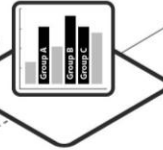Quantitative data collection

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
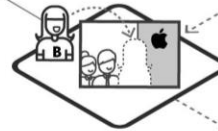
10. Make ongoing adjustments

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

https://www.interaction-design.org/literature/article/personas-why-and-how-you-should-use-them
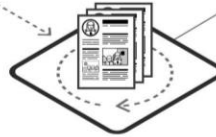
1. ***Collect data.*** Collect as much knowledge about the users as possible. Perform high-quality user research of actual users in your target user group. In Design Thinking, the research phase is the first phase, also known as the Empathise phase.

2. ***Form a hypothesis.*** Based upon your initial research, you will form a general idea of the various users within the focus area of the project, including the ways users differ from one another – For instance, you can use Affinity Diagrams and Empathy Maps.

3. ***Everyone accepts the hypothesis.*** The goal is to support or reject the first hypothesis about the differences between the users. You can do this by confronting project participants with the hypothesis and comparing it to existing knowledge.

10-step process
by Lene Nielsen

4. *Establish a number.* You will decide upon the final number of personas, which it makes sense to create. Most often, you would want to create more than one persona for each product or service, but you should always choose just one persona as your primary focus.

5. *Describe the personas.* The purpose of working with personas is to be able to develop solutions, products and services based upon the needs and goals of your users. Be sure to describe personas in such a way as to express enough understanding and empathy to understand the users.

a. You should include details about the user's education, lifestyle, interests, values, goals, needs, limitations, desires, attitudes, and patterns of behavior.

b. Add a few **fictional personal details** to make the persona a realistic character.

c. Give each of your personas a **name**.

d. Create 1–2 pages of descriptions for each persona.

https://www.interaction-design.org/literature/article/personas-why-and-how-you-should-use-them

6. *Prepare situations or scenarios for your personas.* This engaging persona method is directed at creating scenarios that describe solutions. For this purpose, you should describe a number of specific situations that could trigger the use of the product or service you are designing. In other words, situations are the basis of a scenario. You can give each of your personas life by creating scenarios that feature them in the role of a user. Scenarios usually start by placing the persona in a specific context with a problem they want to or have to solve.

7. *Obtain acceptance from the organization.* It is a common thread throughout all 10 steps that the goal of the method is to involve the project participants. As such, as many team members as possible should participate in the development of the personas, and it is important to obtain the acceptance and recognition of the participants of the various steps. In order to achieve this, you can choose between two strategies: You can ask the participants for their opinion, or you can let them participate actively in the process.

8. *Disseminate knowledge.* In order for the participants to use the method, the persona descriptions should be disseminated to all. It is 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 to possible external partners. The dissemination of knowledge also includes how the project participants will be given access to the underlying data.

9. *Everyone prepares scenarios.* Personas have no value in themselves. Until the persona becomes part of a scenario – the story about how the persona uses a future product – it does not have real value.

10. *Make ongoing adjustments.* The last step is the future life of the persona descriptions. You should revise the descriptions on a regular basis. New information and new aspects may affect the descriptions. Sometimes you would need to rewrite the existing persona descriptions, add new personas, or eliminate outdated personas.

3. Make it complete

c) Assign Persona Types

- Design for the Primary, accommodate the secondary

- **Primary** - primary target/user; only 1 persona

- **Secondary** - can be satisfied by the primary but has additional requirements

- **Supplemental** - satisfied by a combination of the primary and secondary requirements

- **Customer** - need of customers and not end-users

- **Served** - not users of the product but are directly affected by the use of the product

- **Negative** - users that the product is not built to serve

Image from medium.com

4 perspectives

personas can take to ensure that they add the most value to your design project and the fiction-based perspective

1. Goal-directed Personas

- focusses on: "What does my typical user want to do with my product?"

- Objective is to examine the process and workflow that your user would prefer to utilize to achieve their goals in interacting with your product or service.

Image from QuestionPro

2. Role-Based Personas

- also goal-directed, also focuses on behavior

- massively data-driven and incorporate data from both **qualitative** and **quantitative** sources

- focuses on the user's role in the organization

- Where will the product be used? What's this role's purpose? What business objectives are required of this role? Who else is impacted by the duties of this role? What functions are served by this role?

Image from QuestionPro

3. Engaging Personas

- Can incorporate **goal** and **role directed** personas

- rooted in the ability of stories to produce involvement and insight.

  Through an understanding of characters and stories, it is possible to create a vivid and realistic description of fictitious people

- Purpose is to move from designers seeing the user as a stereotype with whom they are unable to identify and whose life they cannot envision, to designers actively involving themselves in the lives of the personas.

- are designed so that the designers who use them can become more engaged with them.

- examine the **emotions** of the user, their **psychology**, **backgrounds** and make them relevant to the task at hand.

Image from QuestionPro

4. Fictional Persona

- does not emerge from user research (unlike the other personas), but it emerges from the experience of the **UX design** team

- Requires the team to make **assumptions** based upon past interactions with the user base and products to deliver a picture of what, perhaps, typical users look like

- can be deeply flawed. May be able to use them as an initial sketch of **user needs**

- Allow for early involvement with your users in the UX <u>design process</u>, should not be trusted as a guide for your development of products/services

Peter

Works as product manager for a mid-sized company.

Is 35 years old, holds a marketing degree.

Has got experience working as a product owner on software products with agile teams.

Has had some Scrum training.

Has managed mature products successfully. Now faces the challenge of creating a brand-new product.

Wants to leverage his agile knowledge but needs advice on creating innovative product using agile techniques.

image from Terri Phillips, i.pinimg.com

Personas

https://www.smashingmaga
zine.com/2014/08/a-closer-
look-at-personas-part-1/

https://www.smashingmagaz
ine.com/2014/08/a-closer-
look-at-personas-part-2/

Requirements gathering for a better user experience

Analyze Data To Understand User Needs

User narratives > Scenarios
A narrative which describes how a user might interact with your system.

- Place your persona in a scenario

- List those tasks that a user will undertake when interacting with your website or system and then create a scenario for each

  Scenarios would be more specific and more manageable

Ie. Suppose that you have a appliance online store

Have created a persona called Adeline who is a 30-year old soon-to-be married who is moving to a new house and looking to buy a washing machine.

In the scenario, you will put Adeline in several "stories" based on the objectives that she would like to achieve when using your website.

You might create a scenario in which Adeline wants to achieve these objectives:
- Searching for a washing machine for her budget
- Comparing the few models of washing machines
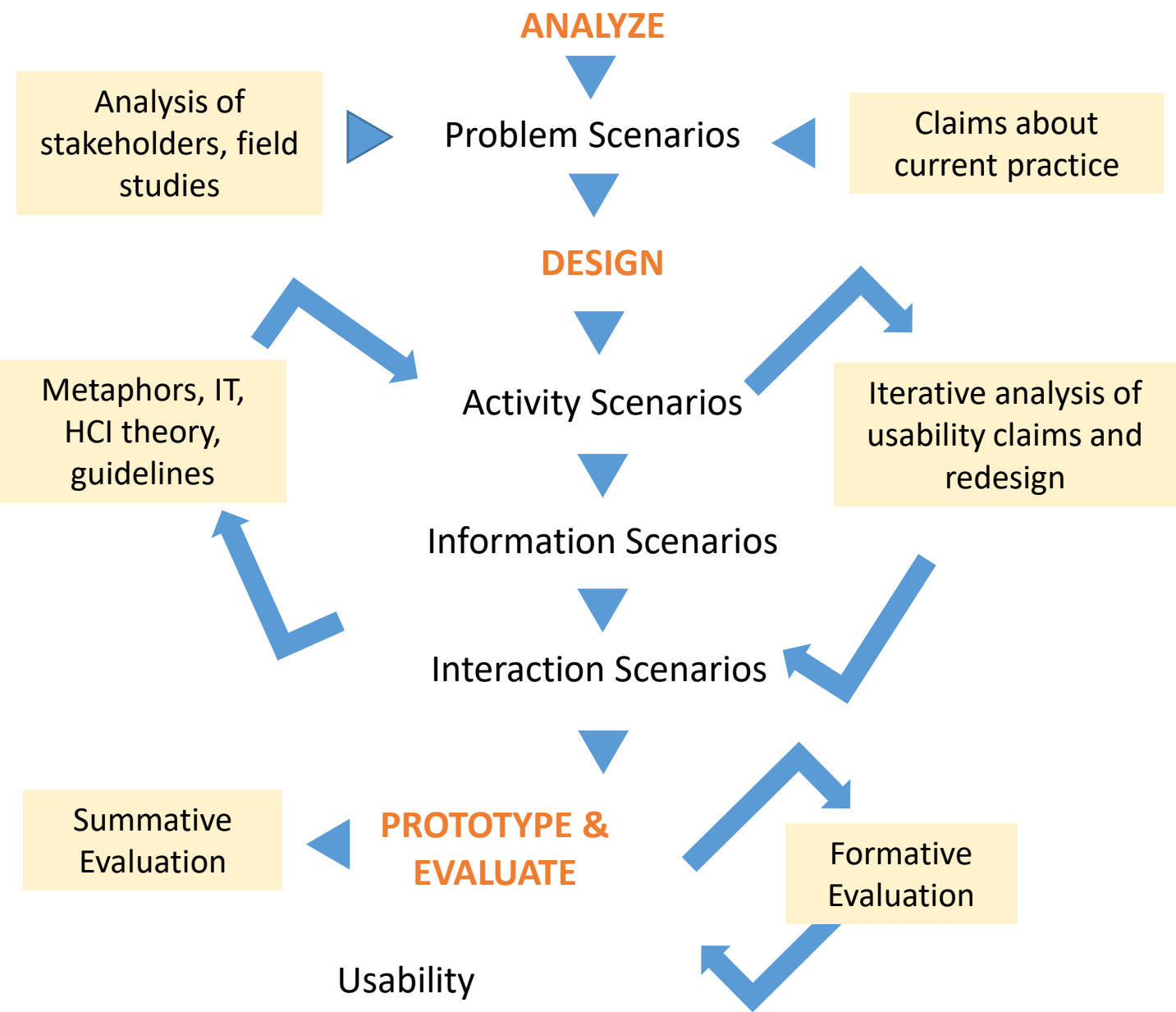- Purchasing a washing machine

User narratives > Scenario-Based Usability Engineering (SUNA)

- A process based on methods used in the design community to make designs 'concrete' and able to be easily envisioned

- By John Carroll and Mary-Beth Rosson

- Focus is on usage and activity (user needs, user expectations, actions and reactions)

- Elaborates a traditional theme in human factors and ergonomics, human characteristics and needs should be pivotal considerations in the design of tools and artefacts

- Scenarios encourage 'what-if' thinking that permit articulation of design possibilities without undermining innovation"

Graphic from dreamstime.com

Scenario-Based Development Framework

by Carroll and Rosson

ANALYZE

Analysis of stakeholders, field studies → Problem Scenarios ← Claims about current practice

DESIGN

Metaphors, IT, HCI theory, guidelines — Activity Scenarios — Iterative analysis of usability claims and redesign

Information Scenarios

Interaction Scenarios

PROTOTYPE & EVALUATE

Summative Evaluation ← Formative Evaluation

Usability

How can Scenario-Based Design be used?

- To ensure that **all participants understand** and **agree to the design parameters**

- To **specify exactly what functionality the system must support**, connecting with the motivations and needs of the envisioned users, through problem scenarios which provide a realistic context of use and set of goals

- To **focus on the value created by a system**, capturing cost-benefit dynamics and showing how it offers an advantage over the way things are for the org considering the development

- To **envisage a range of possible future outcomes**, without having to prejudge the most likely outcome in difficult or complex situations.

- To **translate scenarios into tasks** for conducting walk-throughs, Participatory Design activities and usability tests

A golden path for a user buying a pair of jeans

End