

Hands-On

UX Design for Developers

Design, prototype, and implement compelling user experiences from scratch



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User Personas

To help us achieve our goal of creating a great user experience for our targeted users, we need to create user personas. Personas are fictional characters, based on the user research that we have done in the previous chapters, that represent different user types that we think will be using our product.

User personas are important to us because we can easily know who our user is during the product design process.

In this chapter, we will cover the following topics:

- User personas, and why we need them
- What kind of information we include inside user personas
- The proper structure that user personas should have
- Different perspectives in personas
- The benefits of creating and using user personas during our UX design process

What are user personas?

User personas, or just personas, in UX, are fictional characters created to represent a type of user that might use a site, brand, or product in a similar way. The purpose of personas is to create realistic representations of the users who will use our product.

We create these fictional characters based on the previous steps of UX research that we discussed in the three previous chapters. The idea of personas is to create different types of users that might use our product, which will help us to understand the user's needs, experiences, behaviors, and goals.

We can think of user personas as detailed representations of the different segments of our target audience.

With personas, we create a representation of a group of users who exhibit very similar patterns in terms of their behavior in using a particular application or product regardless of age, gender, location, education, or profession. These behaviors are typically specific to a particular technology/product, decisions, preferences, usage style, and so on.

In the marketing field, personas were introduced in the mid-1990s, but since that time, personas have become a really important part for the process of UX research and other processes of product design and development.

The person credited for the invention of user personas is a software designer and programmer, Alan Cooper. He invented them in the 1980s when he was working as a software engineer.

User personas are the key and the most important document that we will create for analyzing the users. They will be the foundation for the rest of the user documentation, which will expand on personas for deeper insights.

It is not a good idea to skip the creation of user personas during the UX process.

Personas are the most important people in the room when making design decisions. The psychology, behaviors, and demographics of our target users feed into these fictional identities.

So, how do we create them? Well, this depends on our product design needs. They can be large in some cases and small in others. What's important is not how much information they contain, but that every piece of information is relevant and supported by product-usage data.

The following are some of the points that most of the personas should have:

- **The profile section:** Here, we include basic demographic and geographic information, such as the person's age, country of origin and residency, gender, social class, and psychographic information.
- **The personality section:** In this part, usually, we have to get answers by asking questions, such as which statement describes this user better? For example, whether this person likes to pay attention to facts and details or is just not too focused on taking any actions. So, we check the personality and the user character type, because it helps us to have a realistic scenario and mental model for our persona creation and it also helps us to determine what this user type needs.
- **The expertise section:** In this section, we will describe the person's expertise in the platform on which we're building our product; for example, their level of expertise with computers, mobile phones, and technology. So, this section will mainly be about our product.
- **Must do and must never section:** One of the most actionable areas is included in this section. Here, we try to figure out what our user expects and wants to do, and which things frustrate and annoy them.
- **The referents and influences section:** Here, we represent the user's favorite people, brands, and products – what is influencing them when they use a specific product and how they interact with different devices, such as computers, mobile phones, software, and mobile apps.

Just like in the preceding point, this can change based on our product-development area; for example, a digital or physical product.

- **The devices and platforms section:** Which kind of devices or platform is this user using? What are their favorites apps, and what kind of technology are they familiar with?
- **The product section:** Here, we write down their current product lists, those that they are dependent on a daily basis, and those they use rarely.
- **The archetype section:** Here, we will refer to the user personality and characteristics stuff to define their relationship with different products or services that they are using.
- **The key quotes section:** Here, we describe the user, add comments for them, and reflect on their behavior and attitude.
- **The experience goals section:** What does this person like or expect when they use and interact with specific services or products? For example, it can be the speed of finishing a task or it can be a funny service.
- **The brand-relationship section:** Here, we mention the relationship between the person that we are describing and specific products or brands.
- **The picture section:** After we finalize most of the points for creating the persona profile, we add a picture that illustrates the personality, attitude, and lifestyle of our person.
- **The user type section:** Here, we can describe our person type; for example, what kind of personality they have, how patient they are, how fast their mood can change, and so on.

So, by keeping the preceding points in mind, we can visualize the user personas as something similar to this:



Michelle C.

%Age% %Residence%
 %Profession_background%
 %Family_life-style%
 %Software/devices_attitud_behaviour%

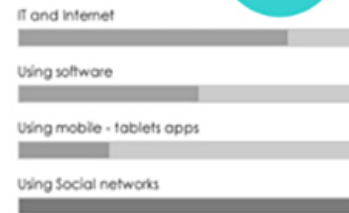
"%Archetype%"

"%key quotes%" Nam at tellus mauris. Duis nec, auctor vulputate id, sagittis vel nibh. Vivamus ac tincidunt mi.

Technology

Information Technology and Internet

EXPERTISE LEVEL



USER EXPERIENCE GOALS



PERSONALITY



App Software



DEVICES & PLATFORMS



REFERENTS & INFLUENCES



MUST DO

- » %do%: %why%.
- » Ocultar procesos innecesarios. No esta interesada en el "control".
- » Ofrecer copys suficientemente descriptivos. Leer entender lo que sucede.
- » Destacar comentarios de otros usuarios. Es influenciable.
- » Evitar ventanas emergentes y saltos innecesarios. Le desconciertan.

MUST NEVER

- » %don't do%: %why%.
- » Lorem ipsum dolor sit amet, consectetur adipiscing elit.
- » Etiam posuere felis in arcu bibendum pharetra.
- » Integer viverra imperdiet porttitor.

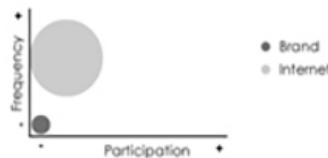
Relationship with Brand & %product%

SEEK and VALUE...

- H1 Free and User review
- H2 Rank
- H3 Top downloads
- H4 %content_or_feature%

L2 Recognize brand but seeks directly into Internet

USING BRAND



BRAND IS...

"%relationship_key_quote% sit amet, conse adipiscing elit. Integer bibendum tempus ante id egestas."

Product IS...

"%relationship_key_quote% (product)"

Creating a persona

We have to ask a lot of questions during the process of creating the user personas, so keeping in mind the points about personas, we can separate them into a few groups that will help us to organize the user's data.

Personal information:

- What is our user's name?
- How old are they?
- What is their professional job or occupation?
- What is their level of education?
- What do they do in their free time?

The professional side of the user, their needs, and their goals:

- What do they target or want to achieve?
- Why do they want to achieve that goal in the first place?
- What are their needs to achieve that goal?

Technical expertise and workplace:

- Where are our users working and how much time per day do they spend there?
- How many hours do they spend using computers or mobile phones?
- What are their favorite mobile apps or websites?
- What devices do they prefer to use and why?

Personal quote:

It can be anything that can identify them as a person, or a phrase that they often use. Also, as we create the user personas based all the things we know so far, we have to keep the following points in mind:

- Think about a different group of users that we spotted in our research

- Think about the product and problem that we are solving for this specific user or group
- Separate them, and define how each group is different

So, now, let's use some real data to take a look at examples of final personas. Let's take the example of different users who are brand managers:



Name: TJ Thyne
Occupation: Co-founder and Chief of Marketing
Company Size: Startup (Team of 5)
Education: MA in Communication
Age: 31

Goals

1. Spreading the message about his new startup,
2. monitoring the web for any mention about his new startup and competitors' actions
3. providing great tutorials
4. increasing new sign ups

Needs

1. Fast and easy tool to manage Social Media
2. Mobile device support and app
3. Collaborative tool
4. Metrics on the go

Technical background and workplace

TJ lives and breathes the Web. It's easier to mention the websites he doesn't visit every day. Thinking about it, he's interested in everything from growth hacking to copywriting. He's a one man marketing machine for his startup. He works from his home office, Starbucks and even from a beer joint. He's permanently connected and working. He loves to travel and runs to relax. He is active on Twitter and Quora, a Facebook addict and Instagram junkie followed by over three thousand people. He uses iPad mini, iPhone 5 and MacBook Air (retina). He loves products that are usable and well designed.

Experience

Business value

Frequency of use

Cooperation

Cost efficiency



That's going on Twitter right now!

Consider another example:



Name: Margaret Atkins
Occupation: VP of Branding
Company Size: Fortune 500 Company
Education: MBA Degree
Age: 47

Goals

1. Maximizing Brand Presence in order to achieve the highest possible ROI
2. Reducing churn by 50% in the next 2 years
3. Mitigating possible losses from bad PR strategies
4. Improving inter-departmental

Needs

1. A collaborative tool
2. Extended analytics report
3. 24/7 media monitoring
4. professional advice

Technical background and workplace

Margaret is a person connected to the internet 24/7. She uses MacBook pro, ipad, iphone and kindle. She spends her entire day working at the office. She travels on business a lot, meeting new people and attending conferences. Her favorite business website is MarketingProfs.com. She is a PRO member of their network and has a special deal with them for all her Branding Department employees.

Experience

Business value

Frequency of use

Cooperation

Cost efficiency



Let's assume we're in. How will we benefit from this?

A persona does not, however, represent every potential user. Personas are designed to create stronger relationships with the most important (and largest) part of that base.

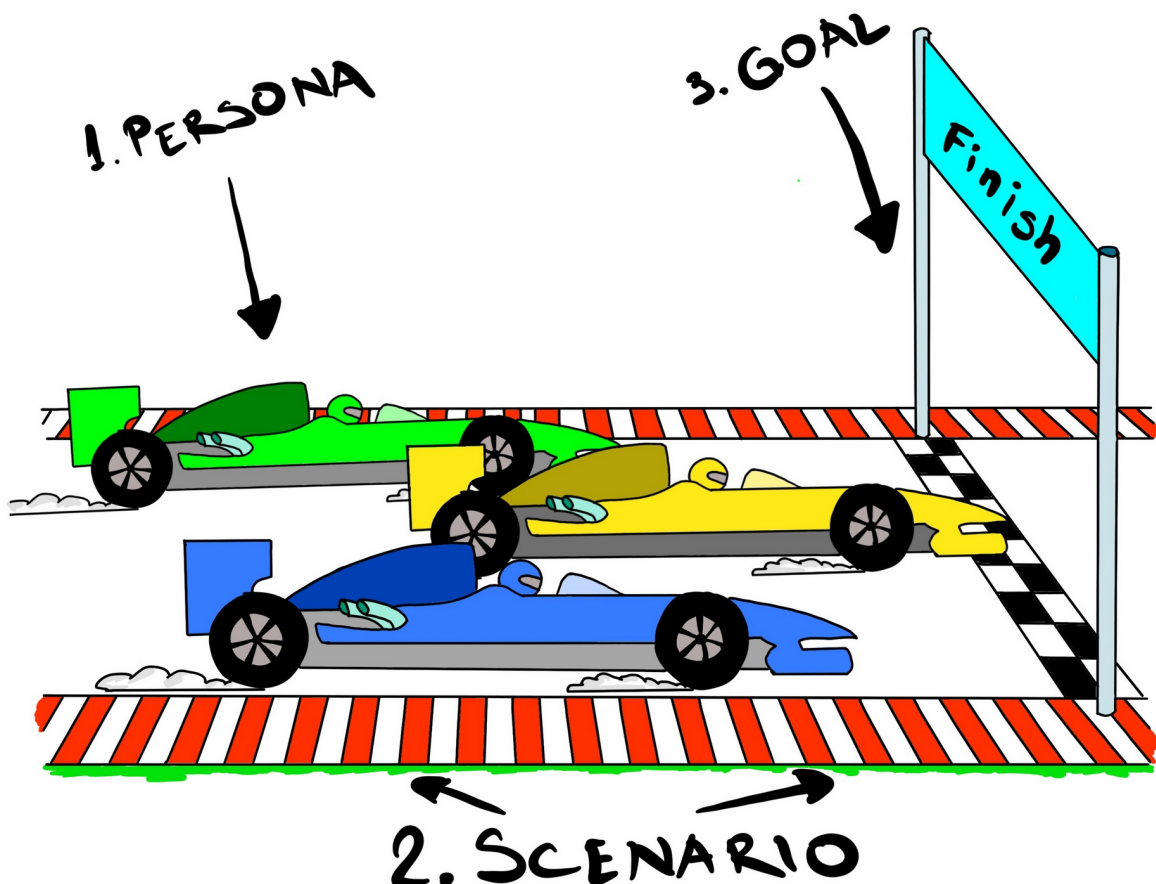
Four different perspectives on personas

A Ph.D and specialist in personas, Lene Nielsen, in her article on *Interaction Design Foundation*, describes four different perspectives on personas, as follows:

- Goal-directed personas
- Role-based personas
- Engaging personas
- Fictional personas

Goal-directed personas

In goal-directed personas, Lene Nielsen describes the main focus of what our typical user wants to do with our product. The objective of this kind of persona is to examine the process and workflow that our user would prefer to utilize to achieve their objectives when interacting with our product or service. This kind of persona is based on the perspectives of Alan Cooper, which we described in more detail in the preceding content. To get a better picture of a persona, check out the following diagram, which illustrates the relationship between users, personas and the goal:



Role-based personas

This kind of persona is also a goal-directed persona, but they focus on behavior.

Role-based personas are hugely data-driven and incorporate qualitative and quantitative information, and they are mainly focused on the role of the user inside the organization.

We can try to examine the roles based on what our users do in their real life to help us get information for a better product design and development decisions.

With role-based personas, we need to obtain answers to the following questions:

- Where will users use our product?
- What is the purpose of the product?
- What business objectives are required and what can be achieved with them?
- Which people will be impacted by its role?
- What kind of functions are being served by this role?

Engaging personas

This kind of persona includes both the goal-directed and role-based ones, but they also cover the more traditional rounded persona, which includes only basic information about the users, such as their geographic data and their basic needs and wants.

We usually create this kind of persona so that we can be more engaged with them.

Involving and engaging users with personas, and creating a type of persona so that we can consider them as real users, will help us during the design process and enable us to create a better product by having the persona in mind.

Since personas can examine the emotions of the users, their behavior, and psychology, they will give us more relevant solutions for the tasks that we are working on.

Personas are described as follows:

“The engaging perspective is 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. The purpose of the engaging perspective 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. The other persona perspectives are criticized for causing a risk of stereotypical descriptions by not looking at the whole person, but instead focusing only on attribution.”


—Lene Nielsen

The following are Dr. Nielsen's 10 steps to create engaging personas and scenarios:

1. Collect data
2. Form a hypothesis
3. Everyone accepts the hypothesis
4. Establish a number

5. Describe the personas
6. Prepare situations or scenarios for our personas
7. Obtain acceptance from the organization
8. Disseminate knowledge
9. Everyone prepares scenarios
10. Make ongoing adjustments

We can do it on a piece of paper if we want. We just display the characteristics of a persona in a few columns and add key details about them, similar to the following image:

 <p>Peter</p>	<p>Works as product manager for a mid-sized company.</p> <p>Is 35 years old, holds a marketing degree.</p> <p>Has got experience working as a product owner on software products with agile teams.</p> <p>Has had some Scrum training.</p>	<p>Has managed mature products successfully. Now faces the challenge of creating a brand-new product.</p> <p>Wants to leverage his agile knowledge but needs advice on creating innovative product using agile techniques.</p>
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Fictional personas

Unlike the other personas, this kind of persona does not emerge from the user research but from our experience during the UX process or from the UX team itself. We, as UX professionals, and together with our UX team, are required to make assumptions based on our past interactions with the user base and products to deliver a picture of what, perhaps, typical users look like.

This kind of persona allows us to involve the users on our UX design process in the early phase, but, of course, we do not consider them as final personas, or as a well-defined user base – we just use them as a guide for the development of our product's early stage.

Benefits of personas

User personas help us to focus on our decisions for the product design, because having a real user problem in mind will make it easier for us to provide an adequate solution. Personas can offer us a quick and cheap way to test and prioritize different features and ideas during the design process.

They can help us in different areas, as follows:

- Stakeholders and leaders can evaluate new product-feature ideas
- Information can architects develop informed wireframes, interface behaviors, and labeling
- Designers can create the overall look and feel of the product
- System engineers/developers can decide which approaches to take based on user behaviors
- Copywriters can ensure that the site content is written for the appropriate audiences

I'm really glad that you made it all this way. Now, since we clearly understand the UX process itself and its benefits, it's time to move on to the more interesting part of product creation: the design and development stages.

Summary

In this chapter, we explained that personas are fictional characters, which we create based on our user research process. We create them with the intention of using them to help us understand our potential users' needs, experiences, behaviors, and main goals.

Creating and using user personas make our tasks less complex and will guide us during the design process by having some specific potential users in mind. We explained how engaging personas can help us ideate our users' behaviors and provide the best product design for them.