Better User Stories

Module 2

Users, User Roles and Personas

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Module 2: Users, User Roles and Personas

Individual Practice

You can use this worksheet to gain skill at thinking about user roles and personas on your own. Remember, though, that once you become proficient in thinking about user roles and personas, you'll always want to define them collaboratively, with team members and stakeholders on the project.

You may complete this activity on note cards or use the template here. First, identify which project you'll use for this activity.

Project name:	Example: Uber-like Ride Service
Your project:	

1. Define Your Role Model.

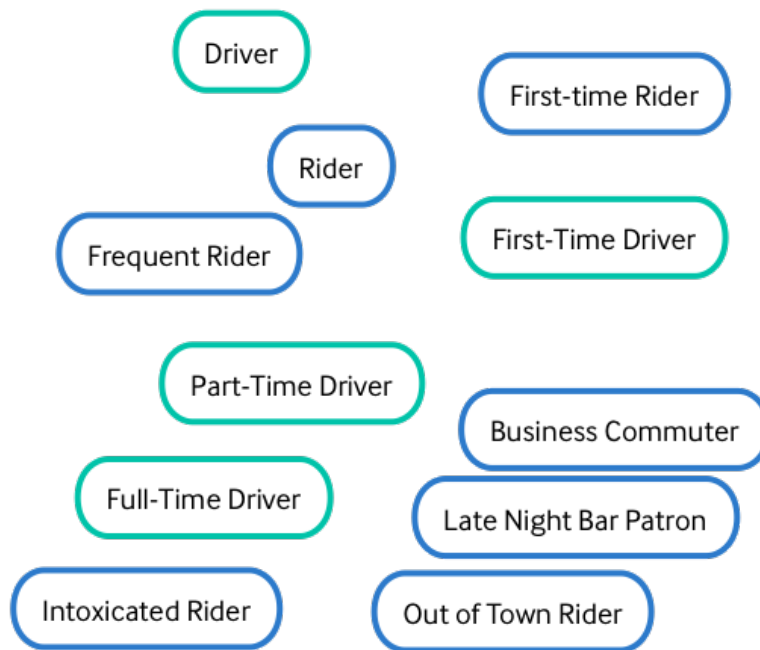1.1. **Brainstorm.** Identify 5–10 user roles. For our sample ride service, that could look like this:

Figure 1: Brainstorming the ride service sample applications's roles.

Now do this on your own project. Use cards on a table, stickies on a wall or a mind-mapping tool.

1.2. **Organize.** Look for aggregate roles that contain other roles within. Visually move roles together if they're related or similar in some way. For our sample ride service, that could look like this:
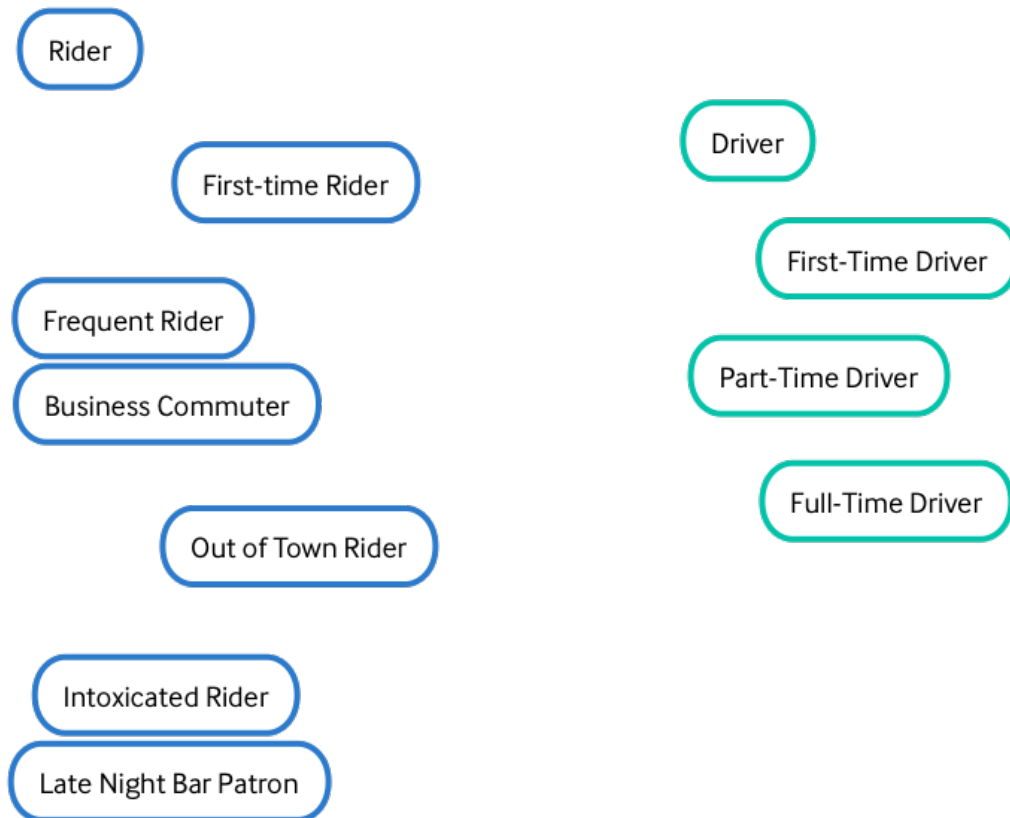

Figure 2: Organizing the ride service sample application's roles. Rider-related roles have been grouped together and moved to the left. Driver-related roles have been grouped together on the right.

Now do this on your own project.

1.3. **Consolidate.** Look for roles that can be combined then rename the combined role, if needed. For our ride service sample application, that could look like this:
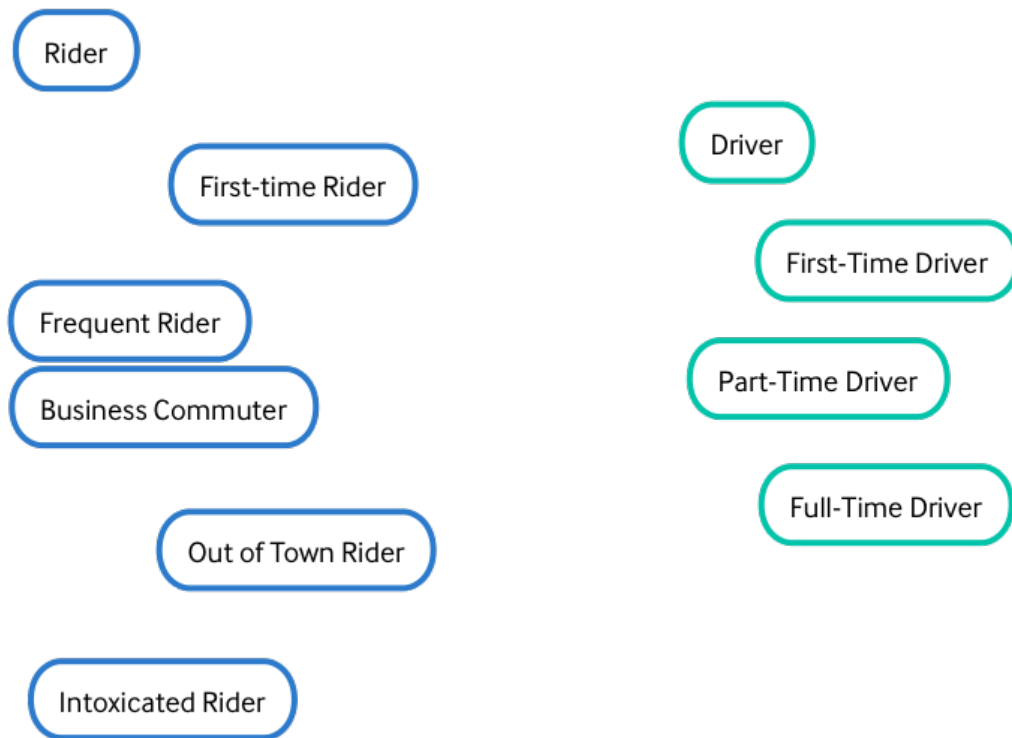
Rider

First-time Rider

Frequent Rider

Business Commuter

Out of Town Rider

Intoxicated Rider

Driver

First-Time Driver

Part-Time Driver

Full-Time Driver

Figure 3: Consolidating roles on the ride service sample application. Intoxicated Rider and Late Night Bar Patron have been combined.

Now do this on your own project.

1.4. **Refine.** Eliminate roles that are unimportant to the success of the product. Minimize the differences within a role while maximizing the differences between roles. For our sample ride service, that could look like this:
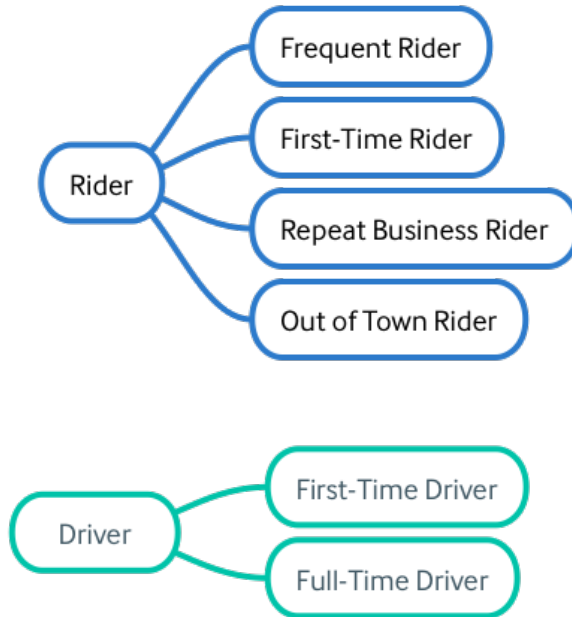

Figure 4: Refining the roles on the ride service sample application. The Part-Time Driver and Intoxicated Rider roles have been removed as unimportant. Remaining roles have been structured to show the hierarchies of the two role types.

Now do this on your own project.

2. Document Your Role Model

Define context, characteristics, criteria: For each role, identify the context in which the role uses the system, characteristics of the role, and the role's criteria for success.

Role: Rider (Example from Ride Service)
Context (e.g., physical and social environment in which a user plays the role, domain knowledge, level of proficiency, how users will access the system) User logs in on their mobile device to get a ride home from a night out, has an established account.
Characteristics (e.g., when the user interacts with the system, and with what regularity; volume of work, mental state of the role while interacting with the system) User requests a ride a few times a month when traffic is heavy and it's easier to call a car service than drive and park someplace.
Criteria (what needs to be in place for this role to consider their user experience a success?) Safe, reliable driver appears within 10 minutes of request. System notifies user of driver's name and license plate number. Payment is automatically debited from the user's account, so no money changes hands.

Now do this on your own project. Use either the space provided below or the User Role Sheets included in this module.

User Role:
Context (e.g., physical and social environment in which a user plays the role, domain knowledge, level of proficiency, how users will access the system)
Characteristics (e.g., when the user interacts with the system, and with what regularity; volume of work, mental state of the role while interacting with the system)
Criteria (what needs to be in place for this role to consider their user experience a success?)

User Role:
Context (e.g., physical and social environment in which a user plays the role, domain knowledge, level of proficiency, how users will access the system)
Characteristics (e.g., when the user interacts with the system, and with what regularity; volume of work, mental state of the role while interacting with the system)
Criteria (what needs to be in place for this role to consider their user experience a success?)

3. Define Personas

Our example application does not require personas, but you may follow these guidelines to create personas for your project, if applicable. Even if your project will not require personas, you may want to experiment by creating one so you can become familiar with the process.

Create personas if the following conditions are true:

- You are creating a high-consideration product
- You aren't just guessing at the extra level of detail in your personas

Follow these guidelines:

- Limit yourself to no more than a handful of personas
- Use actual user data or market research; do not guess
- Assign a gender-neutral name, perhaps associated with the role, such as Taylor the Tester
- Attach a generic (non-recognizable) photo
- Assign a quote that represents the persona's needs

Here are some suggested attributes to define:

- Demographics
- Psychographics
- Personal attributes
- Goals in the system
- Physical, social or technical environment