



503108

UI/UX DESIGN

CHAPTER 2: ESTABLISHING REQUIREMENTS

LESSON 03 – Personas

OUTLINE

1. What Are Personas?
2. Why Create Personas?
3. Finding Information for Personas
4. Creating Personas
5. Advanced Personas
6. Guerrilla Personas: The Empathy Map
7. Final Thoughts on Personas

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1. What Are Personas

- Documents that describe typical target users
- Personas can paint a very clear picture of who is using the site or application, and potentially even how they are using it
- Personas are often used as a touch point whenever a question or concern arises about how aspects of the project should be designed
- There are two distinct types of personas:
 - Marketing-targeted personas that model purchase motivations
 - Interactive personas that are modeled toward usage behaviors

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2. Why Create Personas?

- Personas help you focus on representative users.
- Personas can help resolve conflicts that arise when making design and development decisions
- Personas can be constant reminders of your users
- The purpose of personas is to help you, your team, and/or your clients remove some of the confusion that can crop up

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3. Finding Information for Personas

- Effective personas must accurately depict a number of specific users of your product or website
- Personas must be supported by research
- It's best to find as much data as you can and mix it with a blend of observational and interview data

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4. Creating Personas

Case Study: Messagefirst Personas

To create effective, data-driven personas, Messagefirst (www.messagefirst.com) uses no less than three different data input sources, drawing from the following:

- ▶ **Stakeholders.** We interview them to find out who they think the personas are and what they think their behaviors are. This is *always* included.
- ▶ **Customer advocate.** We interview people in the company who speak directly with customers, which typically means Sales/Marketing and Customer Service. Each of these has their bias, which we make sure we keep in mind as we document our findings. For example, the people who most commonly contact Customer Service are those with too much time on their hands (often retired or unemployed), or someone who's so upset about a product or service that they'll actually take time to contact you.
- ▶ **Customers.** We talk directly to the actual people who are going to use or currently use the product or service. This is included whenever possible.
- ▶ **Customer data sources.** We review any available blog traffic, surveys, and e-mails that are available to us.
- ▶ **Someone we know.** We pick someone we know who fits the initial profile of the persona. This helps keep us grounded, ensuring the persona is believable and realistic, and provides a real person to contact should we have additional questions. This is very important for validation, and *always* included.

Because each data input source we use has a particular bias, we use multiple sources to normalize the data. What's important for data-driven personas is not to go in with an expectation of how many personas you will have, but to let the data reveal how many personas there should be. When analyzing the data, I look for gaps in the behaviors and activities. These gaps reveal the individual personas.

—Todd Zaki Warfel, President, Messagefirst

4. Creating Personas

Nicolle - 34 Year Old Certified Hand Therapist from West Chicago, IL



"My downtime is precious; I make every spare moment count!"

Personal Background

Nicolle has been an Occupational Therapist for nearly a decade. She travels from her home in West Chicago to the city of Chicago via train daily for her job. She is married (Russ) and has two daughters ages 5 (Sydney) and 10 months (Avery) who occupy most of her time when she is not working.

Since downtime is truly a luxury for Nicolle, she likes to take advantage of her daily commute to keep up with the television series that she has purchased season passes for on iTunes. Her iPhone is her constant companion—she uses it to keep in touch with friends and family via email and text messages, but also uses it to keep up with her patient workload. In addition, she has her high-energy playlist ready to go for her lunchtime workouts at the gym in her building.

Nicolle enjoys the all-in-one aspect of her iPhone but does not like to be encumbered by the wires of her earbuds that seem to always get tangled in her pocket. She thinks that the small, single-ear Bluetooth headsets make people look self-important to the point of being ridiculous, so she is hesitant to even consider a Bluetooth option. She is looking for headphones to make her commuting lifestyle easier. As long as the right headset doesn't make her look silly and can function as headphones and a microphone for speaking into during phone calls, she could be persuaded to give them a try.

More About Nicolle

Motivators

Nicolle's standard iPhones ear buds cord continually gets tangled when stored in her pocket or caught up in her clothes and jacket when she's working out or walking to and from her office to the train station. It's a minor annoyance, but removing the annoyance would be very welcome.

ACMEblue Bluetooth Headset Trigger Point

Nicolle saw the ACMEblue on display at the Apple Store on Michigan Avenue in Chicago and decided to try them on. She liked them, but went online to Apple.com and Amazon.com to check-out the reviews online to further influence her decision.

Engagement & Activities

Personal Computer: High / Fluent; comfortable with common apps

Internet Usage: Medium / Fluent; not adventuresome, but has a personal blog, Flickr, YouTube for friends and family.

Mobile: High / Fluent; seeks new tools to help her day-to-day. Uses text messaging frequently, but not high volume.

Social Networking: Facebook & LinkedIn, no MySpace; she likes to stay in touch and aware of how her friends and professionals contacts are doing.

Television Shows: Biggest Loser, Scrubs, How I Met Your Mother, American Idol, Iron Chef and Ace of Cakes

Magazines: Stays current with Celebrity and Parenting periodicals.

4. Creating Personas

- Minimum Content Requirements
 - Photo
 - Name
 - Age
 - Location
 - Occupation
 - Biography

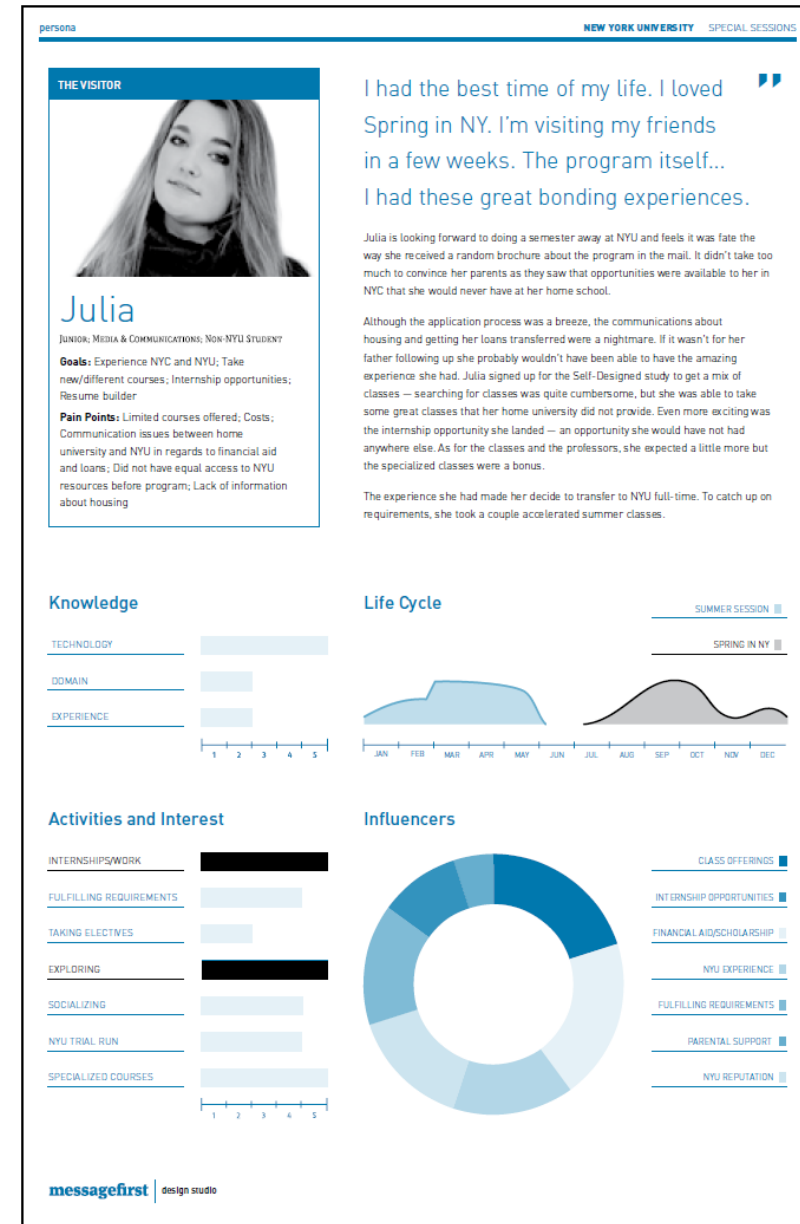
4. Creating Personas

- Optional Content
 - Education level
 - Salary or salary range
 - Personal quote
 - Online activities
 - Offline activities
 - Key entry or trigger point to client, brand, or project
 - Technical comfort level
 - Social comfort level


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5. Advanced Personas





5. Advanced Personas



NEW TO XXXXXX


- Knows that keeping hydrated is good for her.
- Enjoys a variety of flavored waters, but has not yet committed her loyalties.
- Prefers water beverages to sodas.
- Participates in websites that keep her coming back for more; likes to be connected to others and feel like a participant.
- Busy work schedule prohibits business-hours online activity.






THE MAINTAINER


- Has established views about his fitness and health.
- Enjoys an active lifestyle with a lot of food and travel.
- Knows that sodas have a lot of calories and tries to guide his choices to flavored and healthy alternatives—prefers flavored waters unflavored.
- Extreme online user—uses email and IM more than his phone.
- Active in online communities for gaming.





TRYING TO KEEP ACTIVE

- Not as physically active as she used to be.
- Trying to implement more activity into her daily life; takes extra steps to make her common activities more strenuous and physical.
- XXXXXX is her beverage of choice around the house.
- Online activity is growing—finding special interest groups that relate to her and beginning to get more involved.



Cheryl
45 Year Old Freelance Journalist, Lafayette, CO

Cheryl is a freelance journalist who writes for multiple magazines and newspapers across the United States. Since she does not maintain the same 9-5 schedule as so many other Americans, Cheryl makes conscious effort to keep herself fit and active. She enjoys her almost-rural subdivision in Lafayette, a suburb of Boulder, and she shares her spacious property with her two dogs.

"It's important for me to stay physically fit and to compete with others outside of work—as long as they understand that I'm going to win."

In the 80s and 90s, Cheryl used to do her research at the Lafayette library or would make the trip to nearby Boulder to their library or to the University of Colorado at Boulder's library to access their resources. Given the average daily propensity and cost-effectiveness of broadband, she can now handle the majority of her research in her home office—but it also means that she spends less time "up and running". This means that she needs to take a more proactive approach to maintaining a healthy lifestyle and her dogs a good reminder of the value of getting outside, stretching her legs and shaking off the cobwebs (and turning a few extra calories, too!).

Cheryl just started using Facebook and is getting the hang of it quickly. She has been introduced to some great new music that she would never have found on her own. She's been able to add Ben Taylor, Vince Martin & Natalia Merchant to her standards of James Taylor, Carole King, Jackson Browne and, of course, John Denver. She has joined a couple of Facebook groups for Writers@Work and has been interacting with the discussions around incorporating simple activities into her day that will count as additional exercise. She's starting to get comfortable enough to contribute to the discussions and is beginning to expand her online community exposure beyond Facebook and into other areas.

Cheryl buys XXXXXX in bulk at her local Costco and feels that she drinks several bottles a day when she's working on a story. XXXXXX is light in taste and calorieless and is often the only beverage she'll consume for several days on end. She feels that, in addition to the low calories and good taste, XXXXXX is good for her and supports her choice of a healthy lifestyle.

SCENARIO SUMMARY
XXXXXX Beverage's Entry Point
Typing a "XXXXXX water" in her browser or going somewhere like from GetBeverage.com, GetBeverage.com or other online communities. Search suggests it, advertising from her new ideas she's adding her 3042, 5042 and more.

User Motivations
Seeks a beverage that fits with her lifestyle. XXXXXX is a brand she has always really felt associated with. Wants a beverage that won't slow her down and sets of calories in her diet.

Technical Comfort Level
PC: High / Fluent
Web: High / Fluent
Mobile: High / Fluent, does not have a smartphone

Instant Messaging: Very High, easy to keep in touch quickly.
Self-Messaging: Medium, occasional part of her communications.
Social Networking: Medium, just getting started on Facebook, but branching out into other online communities as she becomes more engaged.

5. Advanced Personas

Home Owner — Significant Event

Paul and Helen



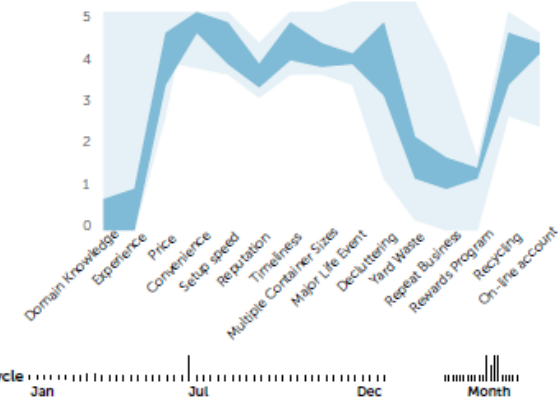
Age: 24-65

*"I guess we can put anything in there.
I'm just not sure how much will fit."*

Helen's mother died a few weeks ago and they're just now getting around to emptying the house. They plan on selling the house, but there's quite a bit they'll need to clean out first. The house also needs some renovation work in the master bathroom.

The basement is filled with stuff Helen's mother collected over the past couple of decades. She never threw anything away. She has newspapers and Time magazines from the past 20 years. There are a few things Helen wants to keep. Most of the clothing and furniture will be donated to Goodwill. Unfortunately, most of her mother's "collectables" have been ruined from water and mildew. She also has paint cans, but Paul and Helen don't know if the paint contains lead or not.

This is the first time Paul and Helen have gone through something like this. They don't even know where to begin. They just want this to be as easy as possible. They know they need a dumpster, but aren't sure how much it will hold. And they assume just about anything can go in the dumpster, unless someone tells them otherwise. Their only other concern is that dumpsters tend to be unsightly. They're hoping to find a company who won't make the front yard look like a construction zone or ruin the yard when they deliver or pick up the dumpster.



Key Characteristics

- Single event like acquisition of a family estate or small remodeling job (e.g. bathroom).
- Little if any past experience with acquiring a dumpster.

Goals

- Get a dumpster quickly.
- Get rid of all the stuff they aren't keeping or donating.
- Avoid destruction to the property during the process.
- Avoid an unsightly dumpster.
- Get rid of the dumpster quickly once it's filled.

Questions

- Is there anything that can't go in?
- How quickly can they deliver and pick up?
- Will they leave the property in the condition it was originally?
- How does this work?
- Is there a permit required?
- How much will it cost?
- How easily can I get ahold of someone if I need to?

Influencers

- Available when needed
- Price
- Vendor leaves the property how they found it
- Having the container size needed available
- Speed of setup and pickup once contacted
- On-line account access for scheduling and payment
- Quality and cleanliness of equipment
- Familiar brand

Frustrations & Pain Points

- Initial sticker shock
- Unfamiliar with the process
- Don't know what they don't know
- Making an apples to apples comparison between vendors

5. Advanced Personas

The Jill of All Trades

Amanda Stone



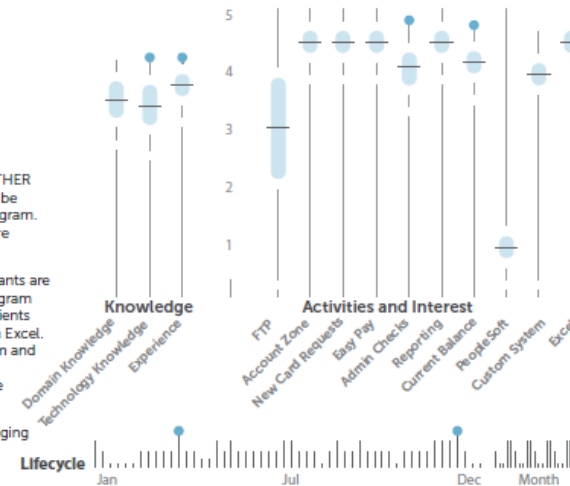
Age: 28-55

"I have to manage multiple programs for my clients."

AMANDA SHARES THE INCENTIVE PROGRAM RESPONSIBILITIES WITH A FEW OTHER colleagues. They share access and manage multiple programs for clients. This can be particularly challenging to make sure she's paying the right people on the right program. She needs to be able to switch between the different programs and know where she's at at all times.

Account Zone really helps her issue new cards and make sure the program participants are paid quickly. The one thing she's missing is the ability to look at each individual program as well as across all the programs she's running to see how things are going. Her clients like to keep tabs on how the programs are performing. Right now she tracks that in Excel. She ends up either sending the Excel file to her clients, or sometimes exporting them and sending a PowerPoint with some nice charts in it. If Account Zone had a way to let her run reports on individual programs and across multiple programs that would be really awesome.

She uses Account Zone pretty regularly—several days a week. And since she's managing multiple programs, she's pretty active all year round.



Key Characteristics

- Manages multiple programs
- Medium to large company
- Moderate volume (50-2000+ orders at a time)
- Multiple people sharing a single role
- 70/30 Quick Pay and Admin Checks
- Weekly to bi-monthly usage
- Year round
- Very interested in reporting
- Wants to run reports across programs
- Heavy Excel use
- Custom internal system to interface with

Goals

- Pay employees quickly and easily.
- Prevent duplicated efforts.
- See what their current balance is to know if they need to wire money.
- Track transactions weekly, bi-monthly, month, quarter, and year.

Questions

- How do I run reports across all my programs?
- Is there a way to get my login info without having to call Ecount?
- Can we integrate with ClientZone some way so that we don't have to go back and forth so much between different applications.
- Am I doing it right?

Influencers

- Integration with current system.
- Ability to pay employees quickly and easily.
- Cost (mostly time).
- Guided help.

Other Applications

- Excel
- PowerPoint
- Internet Explorer

Frustrations & Pain Points

- Can't look across multiple programs at once.
- Can't run reports across multiple programs at once.
- Correcting errors in the exception file "stinks."
- Knowing what the exact problem is and how to fix it isn't clear.
- Multiple steps with multiple applications isn't efficient and makes it easy to "get lost" where she is.
- Multiple confirmation screens.
- Another username and password to remember.
- Finding email with her login information.

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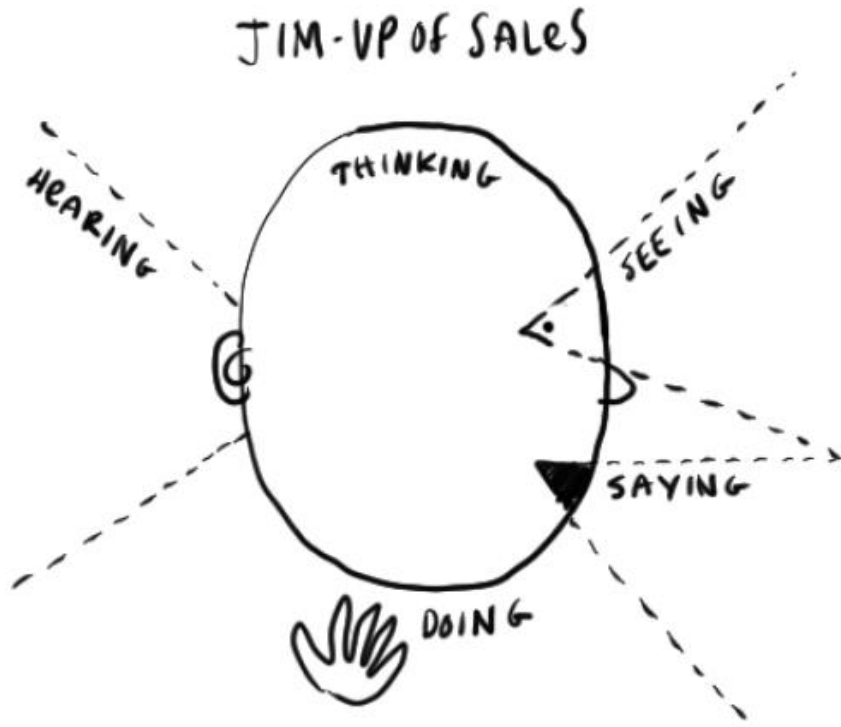


Figure 7.7 Empathy Map template. Helps guide you in facilitating an Empathy Map exercise. Courtesy of Dave Gray.

6. The Empathy Map

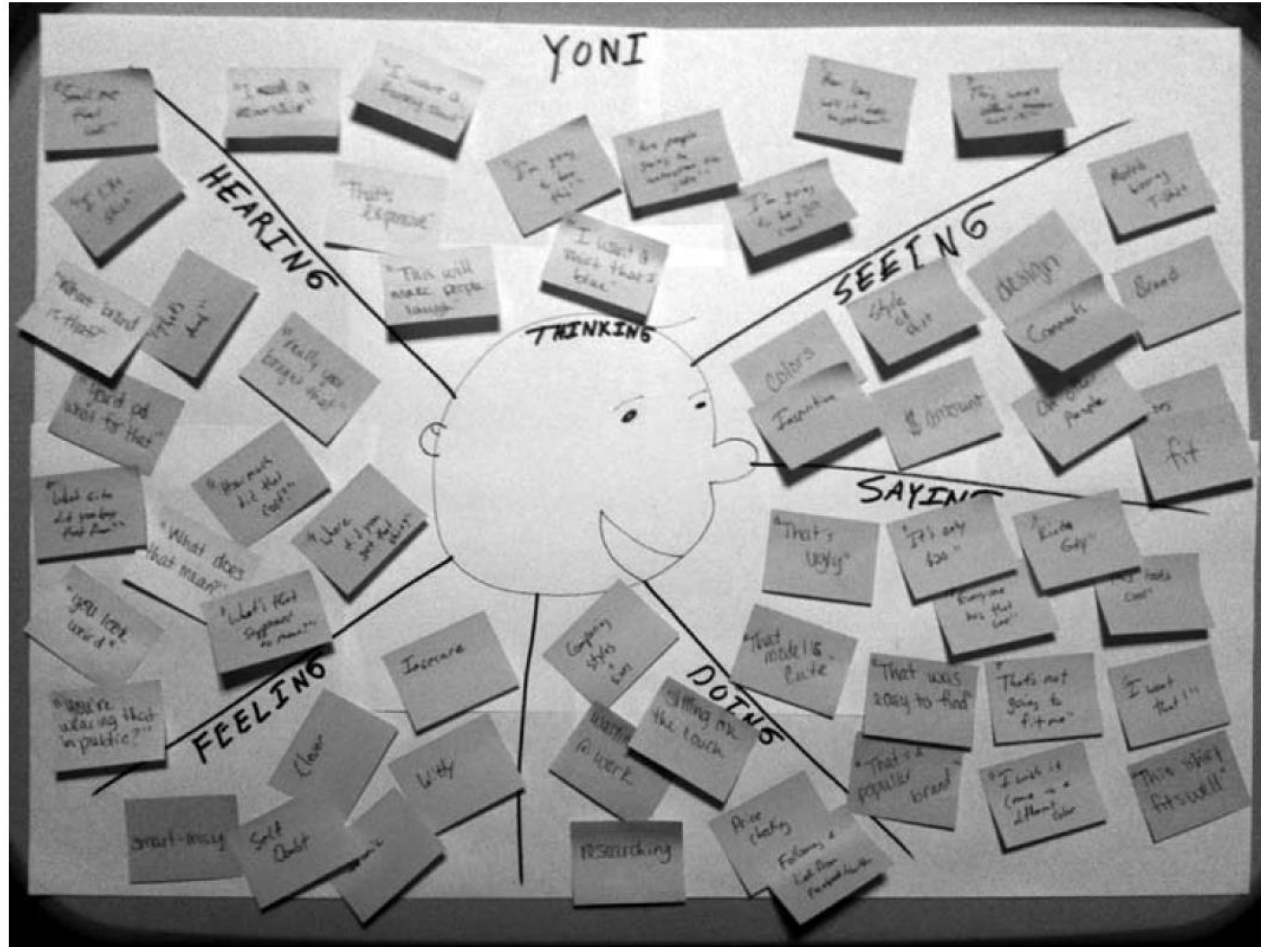


Figure 7.8 Empathy Map example. This Empathy Map was created to identify a male user segment for a t-shirt selling website. Courtesy of Brad Nunnally & Kim Nunnally.

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7. Final Thoughts on Personas

- Many practitioners in the user experience design world do not believe that personas do a good job
- Other practitioners believe that personas meet a specific need that influences the design process in a very positive way
- By watching your target audience, infusing what you learn with research data, and synthesizing all of this into segments, you should be able to create personas that trigger the kind of empathy that keeps your team on track and building the best possible application, website, or product.