

## IMS564 | USER EXPERIENCE DESIGN

### CREATING PERSONAS

Dr Norizan Anwar

1

## Table of Content

- What are Personas?
- Findings Information for Personas
- Who's Who Personas
- Advanced Personas

IMS564

2

2



## What are Personas?

- Personas are documents that describe typical target users.
- They can be useful to your
  - project team,
  - stakeholders, and
  - clients.
- With appropriate research and descriptions, personas can paint a very clear picture of who is using the site or application, and potentially even how they are using it.
- User experience designers often see creating personas as a great exercise in empathy.

IMS564

3

3



## What are Personas?

- Well-crafted personas are often used as a touch point whenever a question or concern arises about how aspects of the project should be designed.
- How to do it? You can take out your personas and ask,
  - How would <this user> perform <this task>? Or
  - What is <this user> going to look for in <this situation>?
- Although this process may not be as accurate as testing functionality and design with actual users, it can help move your project along until you are able perform more extensive tests.

IMS564

4

4



## What are Personas?

- Josh Seiden ([www.joshuaseiden.com](http://www.joshuaseiden.com)) points out that there are two distinct types of personas:
  - Marketing-targeted personas that model purchase motivations
  - Interactive personas that are modeled toward usage behaviors

IMS564

5

5



## Findings Information for Personas

- Effective personas must accurately depict a number of specific users of your product or Application or Web site.
- To achieve that goal, personas must be supported by research. Topic 3 presents techniques for researching and modeling your potential users to provide a firm foundation for your personas.
- Don't look for one method to be the answer, however; it's best to find as much data as you can and mix it with a blend of observational and interview data—this can also include utilizing online surveys and analyzing behaviors in social networks.
- It's a common theme to creating personas: Get real data, but make the personas into real people on the pages. To learn how one company accomplishes this, see "Case Study: Messagefirst Personas."

IMS564

6

6

### Case Study: Messagefirst Personas

To create effective, data-driven personas, Messagefirst ([www.messagefirst.com](http://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 Weblog 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

7

7

## Who's Who Personas

- Identify your audience and accumulate data to support your personas.
- Your next step is to put pencil to paper and start to bring them to life.
- How many personas you need to create varies.
  - In general, the minimum is three, but upwards of seven is not uncommon.
  - Rather than aim for a specific count, consider the number of target segments you have and what you feel is the best way to get a fair representation of them.

IMS564

8

8

## Who's Who Personas

- Example persona is Nicolle, a 34-year-old Certified Hand Therapist from West Chicago, Illinois. She happens to be a nondriving commuter who spends 2 to 3 hours per day traveling to and from her job. The fictional client is a company called ACMEblue, a manufacturer of Bluetooth headsets for Apple's not-so-fictional iPhone.
- The actual persona contains a much more thorough story about Nicolle. Note that the content is written about Nicolle, not "by" Nicolle.
- It's best to write your personas from the third-party perspective and not contend with writing in their distinct voices, especially when you're just getting started.
- As you expand your experience, you should naturally explore and find the style that fits you best and provides the most value.

IMS564

9

9

### 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.

10

10



## Who's Who Personas

- What kind of information goes into personas? The kind of information that your audience will find relevant and believable.
- Based on the research data you've gathered, you should be able to ascertain what is important to the client, brand, and project.
- The majority of the personas you create will share a common set of required content mixed with any amount of data, statistics, and other relevant information that can be considered optional, because it will vary from client to client, if not project to project.

IMS564

11

11



## Who's Who Personas

### Minimum Content Requirements

- When creating personas, you need to provide enough information to draw people in and make them relate to the person they are reading about on the page. To help your audience understand how your persona behaves and thinks, be sure to include six key pieces of information:
  - photo,
  - name,
  - age,
  - location,
  - occupation, and
  - biography.

IMS564

12

12

## Who's Who Personas

### Photo

- A photo is the first (and the real) step to putting a face to your persona. When choosing a photo for your persona, try to make sure that the picture doesn't look too posed or polished.
- Photos that appear to be posed do not have the same effect as those that are in more natural settings.
- Personas seem to be more effective with photos taken in more natural settings, such as the photo in the next slide, where the subject is standing outside in her winter coat, conceivably during her commute. Make sure the photo fits the lifestyle of the persona!

IMS564

13

13

**Posed**



**Natural**



14

14



## Who's Who Personas



### Photo

- There are a variety of online photo resources. Some of the better options are iStockphoto ([www.istockphoto.com](http://www.istockphoto.com)), Getty Images ([www.gettyimages.com](http://www.gettyimages.com)), and Stock.XCHNG ([www.sxc.hu](http://www.sxc.hu)).
- Finding the right photo can be a complete time suck if you're not careful.

IMS564

15

15



## Who's Who Personas



### Name

- Simply put, you've got to put a name to the face.
- The photo you use will humanize the mix of research data and personality traits, and the name will be how everyone refers to your persona during discussions.
- Not only does Nicolle sound better than "Mid-30s Blonde Professional Mom," but it's a lot easier to remember and associate with a specific persona.
- Try to keep the names you use for different personas on a project from sounding too similar.
- Nicolle and Noelle could be easily confused, for example, so look for distinct names.

IMS564

16

16





## Who's Who Personas

### Name

- Although it may be tempting to use the names of coworkers or clients, **don't**.
- When you use names that are like or the same as those of people involved in the project, it is easy for them to try to identify themselves in your personas.
- Choosing different names avoids any uncomfortable situations or hurt feelings.

IMS564

17

17



## Who's Who Personas

### Name

- If you find yourself having difficulty choosing names, some online resources can help you with this: baby-naming Web sites!
  - BabyNames.com: [www.babynames.com](http://www.babynames.com)
  - Babyhold: [www.babyhold.com](http://www.babyhold.com)
  - Social Security Administration's Popular Baby Names: [www.ssa.gov/OACT/babynames](http://www.ssa.gov/OACT/babynames)
  - Random Name Generator: [www.kleimo.com/random/name.cfm](http://www.kleimo.com/random/name.cfm)
- Make sure your name is believable for the persona.

IMS564

18

18



## Who's Who Personas

### Name

- Nicolle works just fine for a Midwestern mother, but Nicola or Natalia may be a much better name for an Italian mother.
- Names that appear to be a little more fun or lively, such as Bob the Builder, aren't. They tend to make your personas look silly and can detract from their value.

IMS564

19

19



## Who's Who Personas

### Age

- Although your research should identify the age range of your consumers, providing a specific age for your persona helps to add authenticity to the biography that you write.
- Behaviors of a 21-year-old college student and a 34-year-old professional mother are significantly different!

IMS564

20

20



## Who's Who Personas

### Location

- At first, location may not appear to be vital information; however, it is important to remember that cultural and behavioral shifts can occur from location to location.
- In Italy, for example, different dialects are spoken in different regions of the country.
- In the United States, a person who lives in Chicago would most likely have a different cost of living than a person in Savannah, Georgia.

IMS564

21

21



## Who's Who Personas

### Occupation

- Knowing what your persona does for a living helps you to identify with them by relating to the patterns of their day-to-day lives.
- A persona who works in therapy meets with many people on a daily basis, whereas a drawbridge operator may not interact much with others.

IMS564

22

22



## Who's Who Personas



### Biography

- The biography is the compelling story that makes the persona real.
- This is where you provide details that you derive from your research data and infuse it with a bit of “real people.”
- The data is very important to the persona, but you do not want to simply quote that information in choppy sentences.
- Instead, you want to weave data, anecdote, and observation into a story that your audience can relate to.

IMS564

23

23



## Who's Who Personas



### Biography

- It may seem a bit strange, but the biography needs to be believable, and it's certainly not cheating to bring aspects of a real person into your persona.
- Nicolle, for example, is based upon both statistical data and the very real behaviors of a person who shares similar activities, beliefs, and desires.
- Depending upon your project, you may need to delve fairly deeply into the biography—sometimes the more details you have, the better.
- Don't feel as if you have to squeeze your persona onto a single sheet of paper. Go with what works best to make your persona true to life and as meaningful as possible to the project you are working on.

IMS564

24

24



## Who's Who Personas

### Optional Content

- As you work with personas, you will find that different projects will require different sets of information to make the personas more applicable.
- The minimum content requirements might also be considered the least common denominators from most of the personas you will create.
- In most cases, you will blend some of these optional content elements with the core of your personas.

IMS564

25

25



## Who's Who Personas

### Optional Content

- Optional content that may add value to your personas includes
  - **Education level** - Knowing how educated a person is can provide a bit more insight into some of their habits. A person with a high school diploma may have substantially different purchasing habits and brand perceptions than a person with a master's degree, and this information can influence how your persona is perceived.
  - **Salary or salary range** - Money talks, and in many cases, the amount of income a person has substantially affects their standard of living and their disposable income. This information can provide significant insight when you are targeting certain levels of affluence.
  - **Personal quote** - What would be the motto that your persona would claim as their own? Sometimes this can give a quick overview into the core of your persona's way of thinking.

IMS564

26

26



## Who's Who Personas

### Optional Content

- Optional content that may add value to your personas includes
  - **Online activities** - This can get tricky; there are a lot of ways people spend their time online. Some people pay their bills, some people are heavily into blogging and social networking activities, and some people simply use their computer as an appliance that gets turned on when they need to perform a task. Given that so many projects have some online component, this element is a bit of a judgment call. You'll need to lean on your research to help paint the picture.
  - **Offline activities** - Does your persona have a hobby? Is there additional information about what the life of your persona is like when they're not online? This element can be every bit as tricky as online activities, and can be every bit as important in influencing your persona.
  - **Key entry or trigger point to client, brand, or project** - Often it is important to understand how a persona interacts with the client, brand, or project. Does the persona hear about it via word of mouth, online reviews, a billboard, television or radio, or from an online pop-up ad? Is your persona looking to solve a problem that can be addressed through the client, brand, or project? Using your statistical data to understand this point, and writing it into your persona, can help ground your approach to engaging users.

IMS564

27

27



## Who's Who Personas

### Optional Content

- Optional content that may add value to your personas includes
  - **Technical comfort level** - Does your persona use a PC or a Mac? Does she own a computer at all? Does she use instant messaging, Flickr, or write a blog? Is she very comfortable with that activity, or is she confused by it? Would she be helped by a very simple solution directed toward a novice? Does she have an MP3 player or other portable device? Does she use a DVR or AppleTV or on-demand programming to watch television? The list can go on and on. And on. Depending upon your client, brand, or project, these notions—and a variety of others—may be important to identify.
  - **Social comfort level** - Given the growth of social media and social networking, it may be important to identify very specifically how your persona engages in that particular space. Does she have a Twitter account? If so, how many followers does she have? How active is she? Is she a leader? Does she use MySpace, Facebook, LinkedIn, or other aggregators or online communities?

IMS564

28

28



## Who's Who Personas

### Optional Content

- Optional content that may add value to your personas includes
  - **Mobile comfort level** - As the usage of mobile devices becomes more prevalent, it is important to consider including how your personas find themselves in the mobile space—if at all.
  - **Motivations to use client, brand, or project** - In some cases you may want to include the reasons the persona would want to use the client, brand, or project. If she is continually getting the wire for her headphones tangled in her coat and yanking them off her head, that may be a good reason for her to consider new headphones. Real scenarios based upon research data can help uncover key motivators to include in your personas.
  - **User goals** - You may also want to identify what the persona is hoping to accomplish by using the client, brand, or project. This can help provide insights into the persona's drivers for using it.

IMS564

29

29



## Example

IMS564

30

30

# Advanced Personas

- A simple persona often can meet most of your needs, especially when your project team is just trying to get an empathetic understanding of your users.
- Things tend to get more interesting when you present personas to your clients.
- In those cases, you'll often find that you need to provide much more than the information that you put together for the basic persona.
- Figures in the next slide illustrate some of the ways you can extend personas.

IMS564

31

31

## Meet the Brand Name Consumers

Consumer insights help us understand users – their motivations, goals and desires. To apply these insights to website design, we develop user personas and scenarios that are grounded in real-world contexts.

This design approach helps craft comprehensive experiences based on an understanding of customers, their motivations, desired outcomes and behavior.

Scenarios specifically answer three fundamental questions that must be addressed before a site can be properly organized:

- Who are your representative users?
- What are the user's specific goals?
- How can users achieve their goals and have a fulfilling experience on your website

### PERSONAS AND SCENARIOS (based on ethnographic studies)

**Personas** are composite characters based on data about your target consumers: in this case, ethnography, existing segmentations, and customer database data.

**Scenarios** are hypothetical yet realistic narratives that describe why these personas might visit the Brand website and what they would do there.

*Persona overview master sheet (landscape orientation). Provides an aggregated view of several personas, along with the segments they represent, in the context of a high-level organizational strategy. Courtesy of Will Evans.*

32



### Brand Name

**Alice, 26 "Aspiring Novice"**

- gen x
- married
- 1 daughter, 5
- weary, aspirational

### PERSONAS AND SCENARIOS (based on ethnographic studies)

Alice is a novice cook aspiring to explore the world of food, especially kid-friendly food, with friends and by looking for new recipes online and in magazines. Her exploration is more about fantasy than reality, though. She's still intimidated and does not try too many new recipes. Her mom didn't pass on too many cooking skills to her, and her friends aren't very experienced cooks either.

Alice is a busy mom of one daughter in Chicago. Both she and her husband work outside the home—she manages the office of a small insurance company.

She is busy, practical, and does not spend much time cooking. Alice just wants to get it done fast and easy—though she often has to prepare different meals for herself and her husband since she started her workout regime after having Sophie two years ago and is trying to get back into marathon shape. She works from a small set of successful recipes she feels comfortable with, and a lot of the meals she prepares are based on packaged and prepared food.

#### SCENARIO

Alice is watching Cartoon Network with Sophie during breakfast. A Brand commercial comes on showing a Name of Brand here. Alice uses brand, and thinks Sophie would go for that dish. She decides to check out the site from work. Alice visits the site during a free half hour before a meeting. The homepage is clear and organized. She sees the main site sections and links to interesting stuff like a recipe of the day.

She clicks the recipe of the day. She likes the tips that come with it—they make her feel that she could tackle this recipe. She is pleased by the clear navigation, unlike other sites where she tends to get lost. She likes the useful features that go beyond what she sees in cookbooks, like the ability to find recipes based on what's in her pantry, and tips on how to use the products.

Alice discovers that she can receive recipe newsletters and clicks "Sign up". Registering is so easy! She fills out some basic information and selects the "Food Your Kids Will Love" newsletter.

She would love to add more of her own touch, and recreate dishes she enjoys in restaurants, like her all-time favorite, jerk chicken. She'd also like to add more fresh vegetables to her meals, because she knows it's healthier.

She takes pride in the fact that she is a thorough planner and able to run her household on a tight budget. Her refrigerator and pantry are always stocked. She plans her shopping to take advantage of sales and coupons.

A week later at lunchtime Alice finds her first Brand e-newsletter: "Pizza, easy as 1, 2, 3." Perfect—her kids love pizza, and she usually buys frozen pizzas for them. There's a link to "Pizza for beginners" that inspires her to see if she can make pizza herself.

The link takes her to a recipe for pepperoni pizza on something called the "Pizza Wizard". She scans the recipe and sees it's pretty simple: only 25 minutes and 4 ingredients. She checks her kitchen to see what she has. She doesn't have pepperoni or pizza sauce but the "Pizza Wizard" suggests substituting them with things she does have in her well-stocked kitchen: sausage and tomato sauce. And perfect! There's a link to a coupon. Neena prints the recipe's grocery list, adds a couple of items she also needs and heads to the store.

Back from the store, Alice gets started. She sees step-by-step instructions on how to unroll the dough and add the ingredients. There are images next to each step. It's easy to understand and follow. She wonders whether she should cook the toppings first, but the pizza FAQs answer that for her.

#### GOALS

- feed her family without a lot of thought or effort
- find quick, easy recipes using basic ingredients
- frequently make two types of meals: for adults, for child
- find kid-friendly recipes and food activities
- find ways to "dress up" her favorite convenience foods

#### PROJECTS & INITIATIVES

- improved navigation and information architecture
- improved sign-up
- contextualized peripheral information
- more targeted newsletters
- recipe wizard
- better coupon integration

#### MEAL PLANNING

- "get it done" attitude
- relies heavily on convenience foods, with relatively few added fresh fruits and vegetables
- spends more time browsing recipes than actually cooking them

33

#### 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.
- XXXXXXX 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 conscientious effort to keep herself fit and active. She enjoys her suburban 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."*

#### SCENARIO SUMMARY

XXXXXXX is a brand she has always easily felt associated with. While a beverage that won't slow her down, she's looking for SOHO, NARA and music.

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 & Natalie 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 "Wish-It-Home" 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 XXXXXXX in bulk at her local Costco and finds that she drinks several bottles a day when she's working on a story. XXXXXXX is light-in taste and calories—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, XXXXXXX is good for her and supports her choice of a healthy lifestyle.

#### User Motivations

XXXXXXX is a brand she has always easily felt associated with. While a beverage that won't slow her down, she's looking for SOHO, NARA and music.

#### Technical Comfort Level

PC: High / Fluent  
Web: High / Fluent  
Mobile: High / Fluent, does not have a land line

#### Instant Messaging

Very high, easy to keep in touch quickly.

#### Social Networking

Medium, just getting started on Facebook, but branching out into other online communities as she becomes more engaged.

*Target overview and target audience persona (portrait orientation). The target overview at left provides high-level summary information and shows the brands the three personas interact with and relate to. The detailed description at right presents an overview and biography of a single persona, along with information about her behaviors and motivations.*

IMS564

34

34

## Home Owner — Significant Event

Paul and Helen



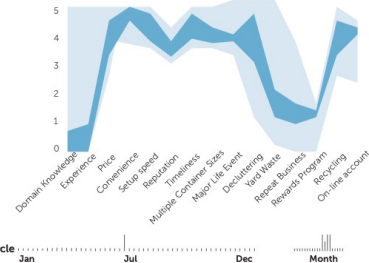
Age: 24-65

**"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 'col-lectables' 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 a hold 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

**Target audience group persona. This persona presents an age-range target, drawn from research data. The information it contains is broad and speaks to audience grouping, not specific individuals. This approach can be useful when you are making a business pitch or when the client's budget does permit detailed exploration of personas. Courtesy of Todd Zaki Warfel.**

35

The Jill of All Trades

Amanda Stone



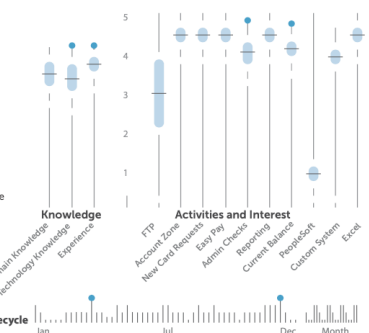
Age: 28-55

**"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 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 Ecoment?
- 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.

**Target audience individual persona. This persona is a heavily data-driven model. While the day-in-the-life story is a narrative, the rest is given in bullet points to serve as a design checklist. The diagram is used to communicate a significant amount of information in a small space. Courtesy of Todd Zaki Warfel.**

36



## Conclusion

- Many practitioners in the user experience design world **do not believe** that personas do a good job of articulating the needs, goals, and attitudes of users.
- They believe that personas can hinder creativity, innovation, or good design for any number of reasons.
- Other practitioners believe that personas meet a specific need that influences the design process in a very positive way—when they are based on solid research data and mixed with a dose of personalized reality.
- All of these resources can help you figure out how personas will work best for your projects, so seek them out.

IMS564

37

37



## Conclusion

- 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, Web site, or product.
- Ultimately, however, your personas are going to be a lot like Santa Claus: They'll only be valuable as long as people believe in them.

IMS564

38

38