User Personas

Embedded Interface Design

with **Bruce Montgomery**

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Learning Objectives

Students will be able to…

- Understand persona development and use approaches
- Consider and apply personas appropriately in UX Research

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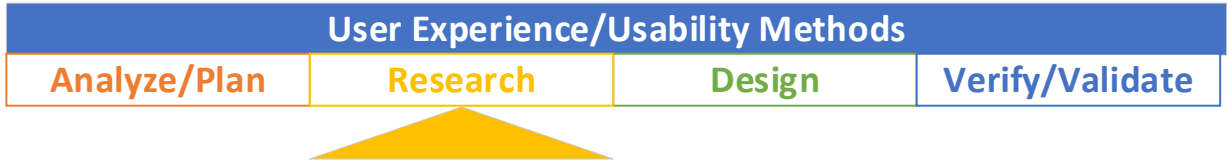
Introduction



- The use and development of personas are common methods for including in a UX Research phase
- There are many variations in approaches…
- We'll look at
  - My initial persona experience
  - Personas as defined by Cooper
  - Proto-personas from Buley
  - Persona Mapping by Menlo Innovations
- First, defining what a persona is

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Personas Defined

- Purpose of personas is to create reliable and realistic representations of your key audience segments for reference [1]
- Personas generally include some key pieces of information:
  - Persona Group (i.e. web manager, audiophile, driver)
  - Fictional name
  - Job titles and major responsibilities
  - Demographics: age, education, ethnicity, and family status
  - The goals and tasks they are trying to complete
  - Their physical, social, and technological environment

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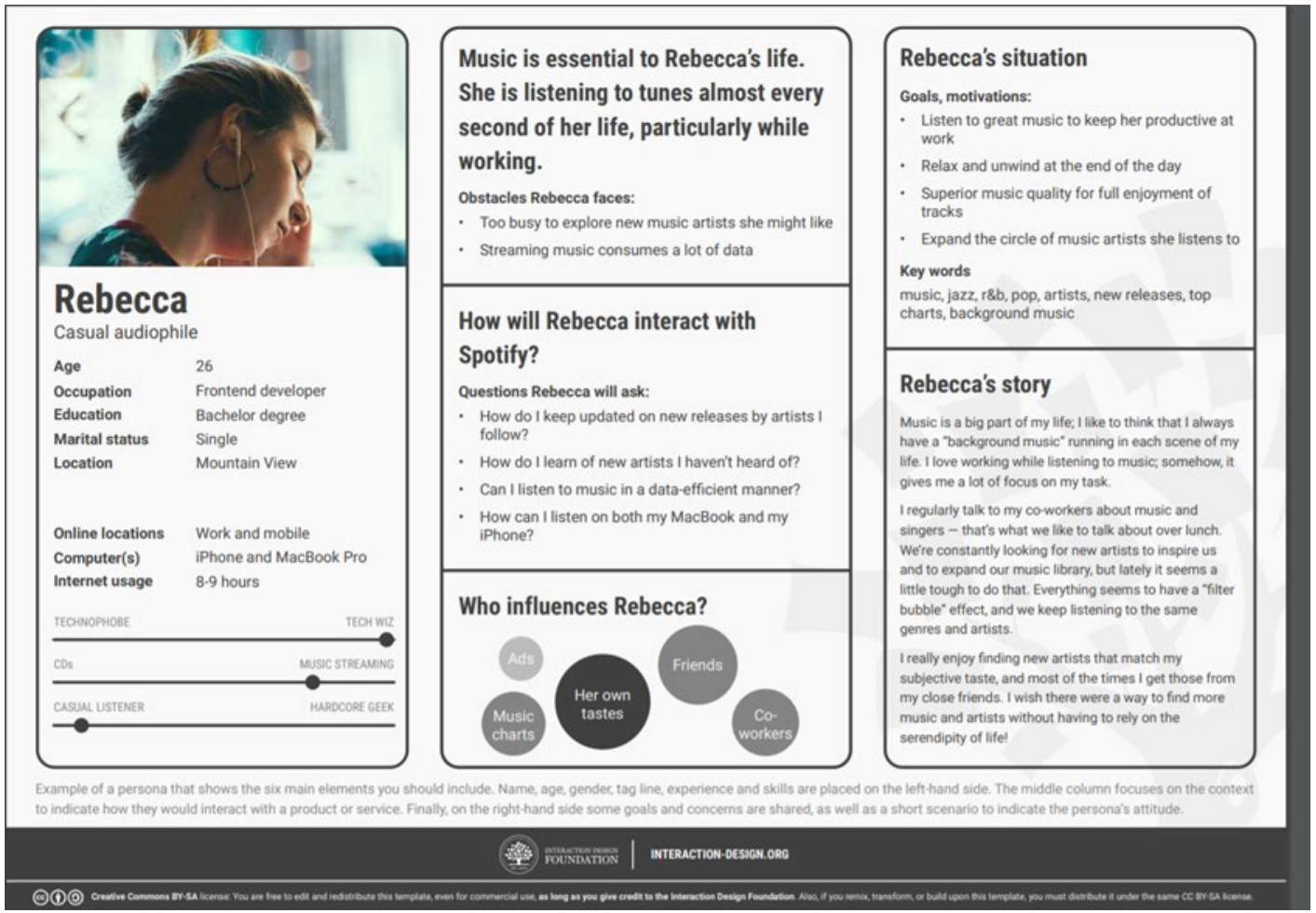
Typical Persona



Rebecca
Casual audiophile

Age	26
Occupation	Frontend developer
Education	Bachelor degree
Marital status	Single
Location	Mountain View
Online locations	Work and mobile
Computer(s)	iPhone and MacBook Pro
Internet usage	8-9 hours

TECHNOPHOBE — TECH WIZ
CDs — MUSIC STREAMING
CASUAL LISTENER — HARDCORE GEEK

Music is essential to Rebecca's life. She is listening to tunes almost every second of her life, particularly while working.

Obstacles Rebecca faces:
- Too busy to explore new music artists she might like
- Streaming music consumes a lot of data

How will Rebecca interact with Spotify?

Questions Rebecca will ask:
- How do I keep updated on new releases by artists I follow?
- How do I learn of new artists I haven't heard of?
- Can I listen to music in a data-efficient manner?
- How can I listen on both my MacBook and my iPhone?

Who influences Rebecca?

Ads, Friends, Her own tastes, Music charts, Co-workers

Rebecca's situation

Goals, motivations:
- Listen to great music to keep her productive at work
- Relax and unwind at the end of the day
- Superior music quality for full enjoyment of tracks
- Expand the circle of music artists she listens to

Key words
music, jazz, r&b, pop, artists, new releases, top charts, background music

Rebecca's story

Music is a big part of my life; I like to think that I always have a "background music" running in each scene of my life. I love working while listening to music; somehow, it gives me a lot of focus on my task.

I regularly talk to my co-workers about music and singers — that's what we like to talk about over lunch. We're constantly looking for new artists to inspire us and to expand our music library, but lately it seems a little tough to do that. Everything seems to have a "filter bubble" effect, and we keep listening to the same genres and artists.

I really enjoy finding new artists that match my subjective taste, and most of the times I get those from my close friends. I wish there were a way to find more music and artists without having to rely on the serendipity of life!

Example of a persona that shows the six main elements you should include. Name, age, gender, tag line, experience and skills are placed on the left-hand side. The middle column focuses on the context to indicate how they would interact with a product or service. Finally, on the right-hand side some goals and concerns are shared, as well as a short scenario to indicate the persona's attitude.

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- Normally, a persona is not an actual person, although the persona may contain a representative picture or quote.
- Example Persona from [2]

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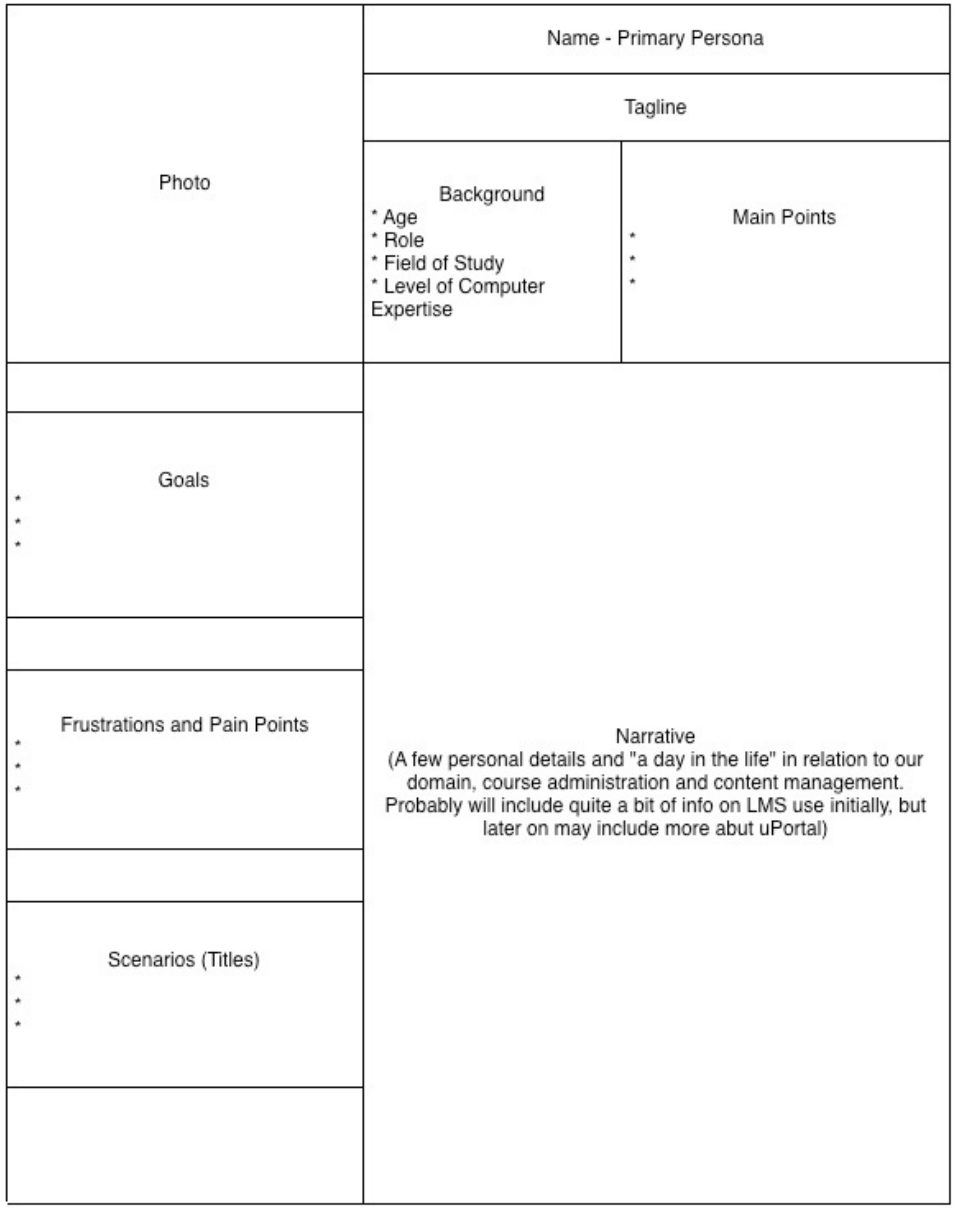
My Initial View of Personas

- When looking at my early UX research, I initially felt making a persona to be a fairly easy exercise with little benefit, almost throwaway or optional
- I thought I could just fill out a template (of which there are many)
  - Example template at [3] includes name, tagline, photo, goals, background, narrative, frustrations and pain points, scenarios
- I didn't initially appreciate the role a good persona could play in a project to connect the design team to their users (WWxD)?
- I also didn't appreciate the real work needed to develop a solid persona



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Persona Approaches

- Alan Cooper and Menlo Innovations each provide support for a more thorough approach (although different) to personas
- Buley's approach – proto-personas – focuses on the more subtle empathic connection as a goal

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Personas - Cooper

- This perspective on UX personas is from Alan Cooper's About Face [4]
- Cooper can claim introduction of personas in his book: "The Inmates are Running the Asylum"
- Cooper treats personas as "user models"
  - A more precise representation of how users behave and think, what they want to accomplish and why
  - For them to be effective, personas must be created with both rigor and finesse, creating archetypes that represent a broad cross-section of users
- Importantly, Cooper feels a variety of users is best allowed for in design by identifying specific types of individuals with specific needs
  - Key: choose the right individuals to design for, and prioritize to them

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Personas - Cooper

- Cooper [4] sees the following roles for personas:
  - Determine what a product should do or how it should behave
  - Communicate across a project team
  - Build consensus and commitment to a design
  - Measure a design's effectiveness
  - Contribute to sales, marketing, and other activities
- Further, Personas should be based on research, to represent groups of users in the representation of an individual, to include motivations and ranges of behavior

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Personas - Cooper

- Cooper [4] warns about using a “provisional persona”, which can raise concerns on wrong design targets, missing key behaviors, having issues with buy-in, or discrediting personas as a technique
  - Somewhat at odds with Buley’s proto-persona, as we’ll see
- The book also addresses three common persona design issues
  - The elastic user – allowing a persona to drift in expertise and expectations
  - Self-referential design – designing to suit the design team
  - Edge cases – designing for rare situations

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Proto-Personas - Buley

Melissa

"It's not about me. it's about my girls."

AT A GLANCE

AGE — 41

LOCATION — Chicago, IL

LIFE STAGE — Divorced with two kids

JOB — Corporate procurement manager

MOTIVATORS

FAMILY — Doing what's right for her kids and looking after her parents are the most important things in her life.

BEING HELPFUL & APPRECIATED FOR IT — She gets a lot of pride from being productive, effective, and helpful. Being thanked and acknowledged for it is the motivatin that keeps her going.

FEELING HAPPY & GRATEFUL — Melissa gets frustrated and frazzled because she's always running, but really she values being happy and tries to appreciate all the good things in her life, particularly after a difficult divorce.

BEHAVIORS

TIGHTLY SCHEDULES THE DAY — The morning routine to get the kids off to school and herself off to work is locked in. She's busy at work all day and tends to spend the majority of her day in meetings. The evening routine is equally structured. When her ex has the girls, she goes out with a friend for dinner or catches up on the phone.

VOLUNTEERS — At kids' school and church.

SPENDS TIME WITH EXTENDED FAMILY — Parents live and sister's family live nearby. Most weekends she visits their house or they vist hers.

TALKING ON THE PHONE AND "CATCHING" UP VIA FACEBOOK — Likes to talk on the phone with girls friends and her sister. Late at night after work she hops on FaceBook to achieve the same sense of connection.

NEEDS

- Social connection
- Would like to start dating again
- Exercise and "me" time
- Would like to just sit and unwind, but feels like she's usually so amped up from her schedule that simply resting feels wrong

- Proto-personas are Buley's discount way of doing persona synthesis with just what your team knows
- Image from [5]

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Proto-Personas - Buley

- Buley's proto-persona [5] is designed to encourage the team to think empathically about customer needs during design work
- Buley treats the persona as a hypothesis – the persona can change as more data is gathered
- Development method is to break a group into teams of three or so to fill out a persona template, then share and discuss, all based on available data
- Proto-personas differ from standard personas because they're not based on thorough, observed user research, although over time, they may strengthen

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Proto-Personas Exercise

- Groups of 3ish
- For your persona, fill out the following:
  - Name
  - Quote/Credo
  - At a glance: Age, Location, Life Stage, Job
  - Motivators (top 3)
  - Behaviors (top 3)
  - Needs (top 3)
- We'll present the personas, and then rank the one that fits our UX profile the best

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Personas and Persona Mapping - Menlo

- A different approach to personas from Menlo Innovation's High Tech Anthropology™ methodology [6]
- The goal is to quickly identify the variety of roles and perspectives of users who may interact with the system.
- The Menlo persona structure includes
  - A photograph to helps make the person "real" to the team
  - A realistic name and age
  - Organization or place where this persona can be found
  - Three important attributes about the person, two of which are related to the project
  - Three goals, written in the future tense, with two of the goals related to the project
  - Initial persona count is between 10 and 20.

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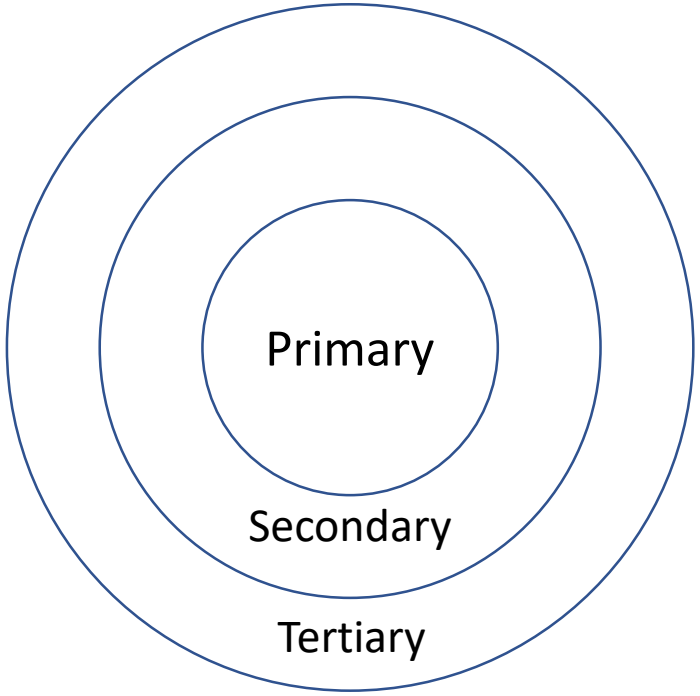
Persona Mapping - Menlo

- In the Menlo process [6], at this point, the customer (not the design team) performs persona mapping, picking 1 primary persona, 2 secondary, and 3 tertiary, as well as adding notes from the persona mapping exercise discussions
- The personas selected are put into a chart of roles (with the 6 personas selected) and selected goals (about a dozen)
- This leads to clear identification of the key design elements for the system



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Personas - Summary

- Whatever process you feel is appropriate, having a persona for your design
  - Keeps key design concerns visible
  - Builds consensus and commitment
  - Encourages an empathic team connection to the user
- If the team starts to regularly ask: would “Melissa” (or whoever) like this feature or would they use the product in some way, your persona is doing it’s job

- Next up, use cases and UML…

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References

[1] https://www.usability.gov/how-to-and-tools/methods/personas.html
[2] https://www.interaction-design.org/literature/topics/user-personas
[3] https://wiki.fluidproject.org/display/fluid/Persona+Format
[4] About Face (4th edition), Cooper et al., 2014, Wiley
[5] User Experience Team of One, Buley, 2013, Rosenfeld
[6] https://www.infoq.com/articles/joyinc-hightech-anthropology

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