How to Create Personas

MAD9034

| Major Project	Major Project	Major Project		Major Project	Major Project
Product Research Project Planning │ Persona Research	**Persona Creation** │ Persona Working Session	User Scenarios │ Information Architecture	Reading week	User Flows │ Ideation and Design Concept Mockups	+ 5 weeks
Week 1 of 9	Week 2 of 9	Week 3 of 9		Week 4 of 9	

UX Design Process

What is covered: Define

- **Empathize**

- **Analyze and Define**

  Make sense of the research data
  - Thematic analysis
  - Define problems to solve
  - **Persona**
  - Information Architecture

- **Design/Ideate**

- **Prototype**

- **Test**

- Implement + Measure
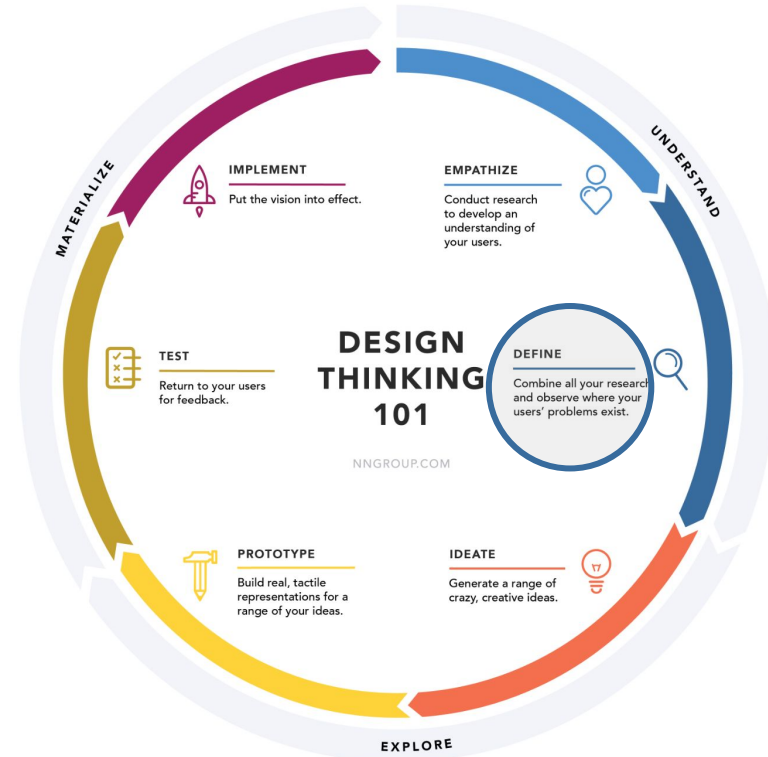
User Research Methods

Know the User

	Gather data	Analyze data
Card sorting	●	
Contextual Interviews	●	
Focus Groups	●	
Individual Interviews	●	
Persona		●
Usability Testing	●	
Task Analysis	●	●
Use Cases		●
Surveys	●	

Persona Creation

Make sense out of the research data

"Personas help everyone from programmers to executives understand users in a way no other tool can: at a gut level. Personas help guide design decisions, end those lengthy arguments about what users need, and get everyone to agree on what product you're building." (Alan Cooper, American software designer and programmer, coined the term "persona" for the first time)

- A **UX persona** is depicted as a synthesized user from observations of many people.

- Each **persona** represents a significant portion of people in the real world and enables the designer to focus on a manageable and memorable cast of characters.

- **Personas** enable designers to create different designs for different kinds of people and to design for a specific somebody, rather than a generic everybody.
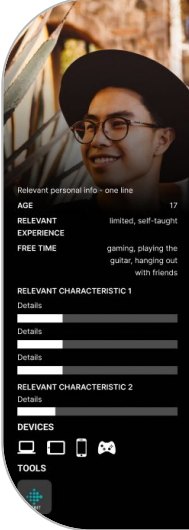
Personas

Steps to create them

- Identify your users
- Decide what to ask
- Decide how to ask
- Get access to users
- Gain an understanding of the users
- Analyze the data
- Synthesize a model of users
- Produce a persona document
- Socialize the personas with other stakeholders

User Persona

A unique group of people who share product goals and needs

- Based on user research data
- Link to user data
- Name
- Personality
- Face
- Relevant personal information

Image: Laura Olac

Persona: A Product Team Tool

Increase productivity and satisfaction

Help set project goals and requirements

Expedite development
- **Improve collaboration** > feature priority based on user needs
- **Reduce acceptance testing** > focus on the most important functionality
- **Testing and verification:** better focused test goals and metrics

[Using Personas to Prioritize Features](#)

User Persona Name
High school student

A few paragraphs to describe the background and reality of this persona in a way that is relevant for the product that you are working on. Ensure that the description is relevant for the larger group of users represented by this persona -- in this example, high school students. Based on data extracted from user research, think of what is unique about the group of people represented by this persona. The sections below can be slightly modified to fit the purpose of the persona. Make sure you always capture goals, frustrations and motivations.

Relevant personal info - one line

AGE   17
RELEVANT   limited, self-taught
EXPERIENCE
FREE TIME   gaming, playing the
                                          guitar, hanging out
                                                    with friends

RELEVANT CHARACTERISTIC 1
Details
Details
Details

RELEVANT CHARACTERISTIC 2
Details

DEVICES

TOOLS

LANDSCAPE
- Describe the general context for this persona

MOTIVATIONS
- Describes what motivates this persona in relation to your product
- Describes what motivates this persona in relation to your product

GOALS
- Persona goal
- Persona goal
- Persona goal

EXPECTATIONS
- Product expectation 1
- Product expectation 2
- Product expectation 3
- Product expectation 4
- ...

CHALLENGES/FRUSTRATIONS
- When there is too much new information at once, it is hard to understand how everything is related and what you need to start your assignment
- Finding a strong criteria to decide what career to embrace in the future, which would guide his choice of college or university
- Manage stress, mental health, and part time employment required to fund his undegraduate studies

I would like to be successful and be able to make enough money to live comfortably and be financially stable. Yet I also want to feel like my work is making a difference and improving the lives of others. I want to be challenged and never bored.
Sarah, a 16-year-old girl from Canada who aspires to be a scientist

High school student quote
Teenage hacker Sam Curry from Nebraska

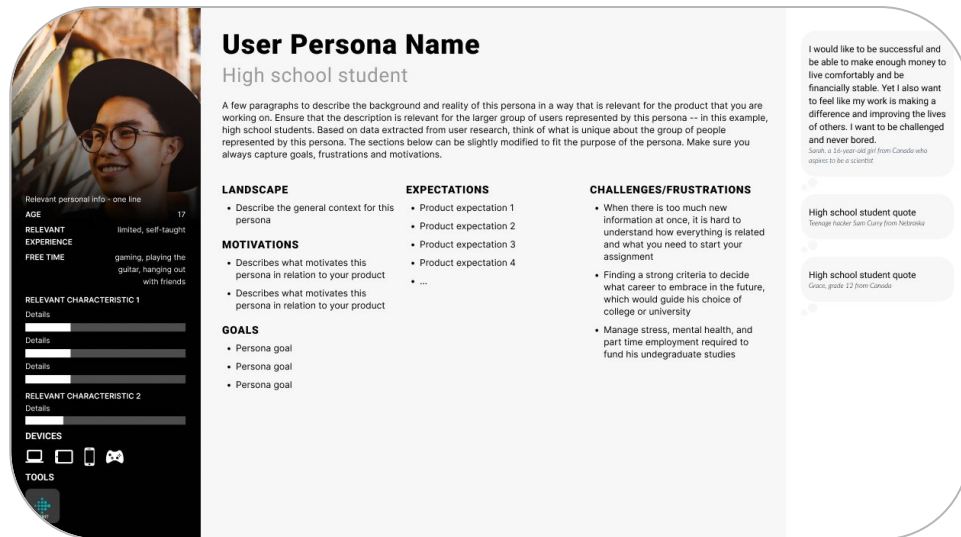High school student quote
Grace, grade 12 from Canada

Image: Laura Olac

Personas Tips

User Requirements: What they are and what they are not

Are

Real needs based on use and behaviours

What it takes to accomplish goals

Unarticulated, tacit information

Foundation for user-centred product design

Are not

What the organization thinks users should have

What programmers want

What customers ask for

Socially accepted preferences and attitudes

Personas

Primary and Secondary Personas

The **primary persona** is the primary user of a product.

SERVICE CONSUMER

The **secondary persona** is another user of the product for whom we will make accommodations as long as the primary persona's experience is not compromised.

SERVICE PROVIDER

Source

Major Project

Now, in class: Review persona data

Work within your group for one last time (10 minutes)
● Review your team's persona user research data
● Ensure all content is well captured and clear for everyone
● Discuss findings, trends, similarities, differences
● Ensure everyone has access to the Figma file
From this point on, you will work independently

Persona Creation: Analyze the Data

Major project: Week 2 of 9

Persona Creation

Analyze the data

Look at a **range of variables** across a **range of participants**, and find the **patterns that are meaningful** to your project.

- Identify attributes of participants' attitude and behaviour captured in research data

- Rank each participant on each attribute

- Look for common traits among participants who share similar attributes

- Group of similar participants with similar attributes and common traits = a persona

Persona Creation

Analyze the data: identify attributes

Example of attributes for students looking for tutoring services

- Status (international vs native local vs native out of town)

- Level of support required: ongoing vs one-off sessions when needed
- Looking for services online, in person, indifferent
- Different student types, ages, other characteristics
- Time of the day
- Level of support required by child
- Reluctant to participate in extracurriculars, vs enthusiastic
- All school subjects vs specific ones
- etc

Persona Creation

Analyze the data: identify attributes

Example of attributes for seniors

- Lives independently vs live with support
- Level of support required: ongoing vs one-off help with specific errands
- Requires physical support vs companionship
- Reluctant to get help vs enthusiastic to get help
- Regular support required vs ad-hoc
- Age of senior
- etc.

Persona Creation

Analyze the data: rank participants for each attribute

Attribute	1	2	3	4	Attribute
Lives independently	**Sue, Fred,**	**Mark, Phil,**	**Rick, Ann**	**Dan, Amy, Mary,**	Lives with support
Reluctant to get help	**Ann, Rick, Fred,**	**Mary, Mark, Sue,**	**Dan, Phil,**	**Amy,**	Enthusiastic to get help
Seeking physical support	**Dan, Phil,**	**Ann, Rick, Fred, Sue,**	**Mary, Amy,**	**Mark,**	Seeking companionship
Seeking regular support	**Dan,**	**Amy, Rick, Ann,**	**Mary, Fred,**	**Phil, Mark, Sue,**	Seeking ad-hoc support
etc.	**Ann, Mark,**	**Dan, Rick,**	**Mary, Amy,**	**Phil, Fred, Sue,**	etc.

Persona Creation

Analyze the data: rank participants for each attribute

Look for patterns. Looks like Ann and Rick have many common attributes.

Attribute	1	2	3	4	Attribute
Lives independently	**Sue, Fred,**	**Mark, Phil,**	**Rick, Ann**	**Dan, Amy, Mary,**	Lives with support
Reluctant to get help	**Ann, Rick, Fred,**	**Mary, Mark, Sue,**	**Dan, Phil,**	**Amy,**	Enthusiastic to get help
Seeking physical support	**Dan, Phil,**	**Ann, Rick, Fred, Sue,**	**Mary, Amy,**	**Mark,**	Seeking companionship
Seeking regular support	**Dan,**	**Amy, Rick, Ann,**	**Mary, Fred,**	**Phil, Mark, Sue,**	Seeking ad-hoc support
etc.	**Ann, Mark,**	**Dan, Rick,**	**Mary, Amy,**	**Phil, Fred, Sue,**	etc.

Persona Creation

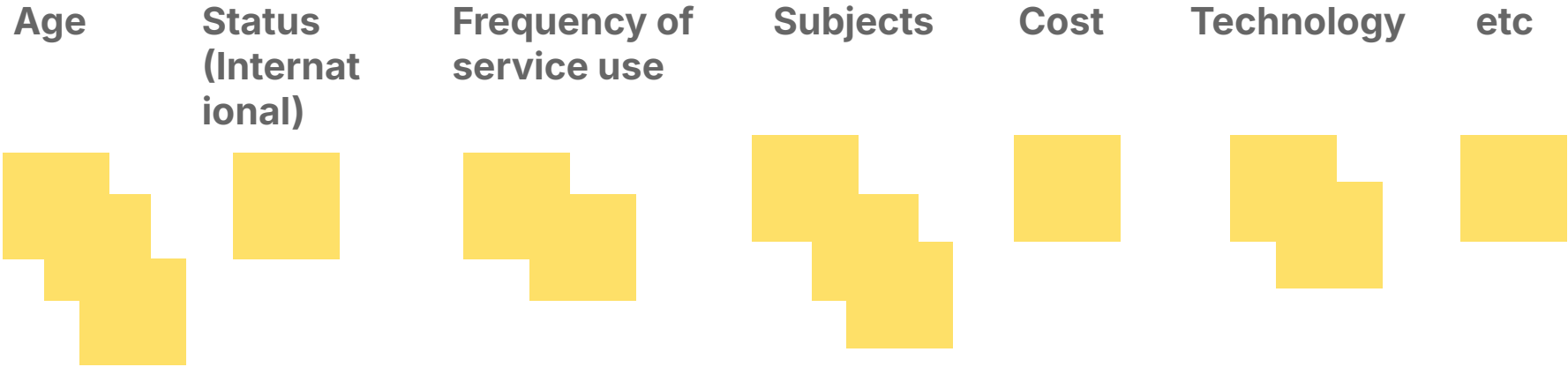Analyze the data: rank participants for each attribute

Look for patterns. Looks like **Sue** and Fred have many common attributes.

Attribute	1	2	3	4	Attribute
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Seeking physical support	**Dan, Phil,**	**Ann, Rick, Fred, Sue,**	**Mary, Amy,**	**Mark,**	Seeking companionship
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etc.	**Ann, Mark,**	**Dan, Rick,**	**Mary, Amy,**	**Phil, Fred, Sue,**	etc.

Persona Creation

Analyze the data: Affinity Diagramming

Age   **Status (International)**   **Frequency of service use**   **Subjects**   **Cost**   **Technology**   **etc**

Look for patterns in the data to identify the different user types and decide what group of users you would like to focus your attention on/design for. Example: All students, high school students, University students, etc

Persona Creation

Analyze the Data

Identify as many groups of participants who share more common attributes than disparate attributes. Each of these groups should be represented by one persona.

Identify which **attributes are <u>not</u> shared**, so you can account for those in your design.

Example: Participant A may seek both regular ongoing support, as well as ad-hoc support, but it may not translate into a separate persona.

It's not necessary, or even realistic for ALL participants in a group you identify to share ALL attributes.

Persona Creation

Analyze the Data
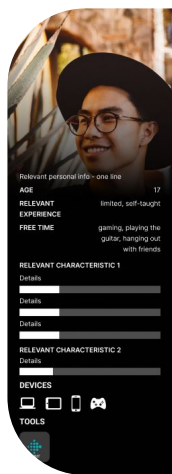
Determine which groups (personas) you will design for

- Multiple personas > which personas are in scope and which are not

- Still multiple personas > identify which are primary, and which are secondary

You can't design for everyone!

Persona Creation

Synthesize a model of users

When you have your groups of users identified, think of how to best describe them.

User Persona Name
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LANDSCAPE	EXPECTATIONS	CHALLENGES/FRUSTRATIONS
• Describe the general context for this persona	• Product expectation 1	• When there is too much new information at once, it is hard to understand how everything is related and what you need to start your assignment
MOTIVATIONS	• Product expectation 2	
• Describes what motivates this persona in relation to your product	• Product expectation 3	• Finding a strong criteria to decide what career to embrace in the future, which would guide his choice of college or university
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GOALS	• ...	• Manage stress, mental health, and part time employment required to fund his undergraduate studies
• Persona goal		
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DEVICES

TOOLS

I would like to be successful and be able to make enough money to live comfortably and be financially stable. Yet I also want to feel like my work is making a difference and improving the lives of others. I want to be challenged and never bored.

Sarah, a 16-year-old girl from Canada who aspires to be a scientist

High school student quote
Teenage hacker Sam Curry from Nebraska

High school student quote
Grace, grade 12 from Canada

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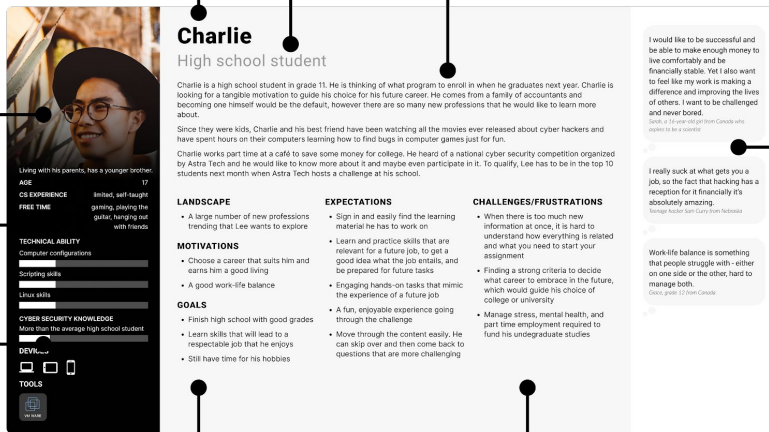
Charlie
High school student

Charlie is a high school student in grade 11. He is thinking of what program to enroll in when he graduates next year. Charlie is looking for a tangible motivation to guide his choice for his future career. He comes from a family of accountants and becoming one himself would be the default, however there are so many new professions that he would like to learn more about.

Since they were kids, Charlie and his best friend have been watching all the movies ever released about cyber hackers and have spent hours on their computers learning how to find bugs in computer games just for fun.

Charlie works part time at a café to save some money for college. He heard of a national cyber security competition organized by Astra Tech and he would like to know more about it and maybe even participate in it. To qualify, Lee has to be in the top 10 students next month when Astra Tech hosts a challenge at his school.

Persona Creation

The anatomy of a persona document

Remember that a persona is a tool for the entire product team to use. Make it relevant!

Name

User type

Bio

Face

Demographic Information

Relevant technology experience

Quotes

3 goals

3 frustrations

Persona Creation

Socialize your personas

Personas represent a tool. For the tool to create value, it has to be used.
Ways to socialize your personas:

- Presentations to product stakeholders

- Persona posters on walls with high traffic and visibility

- Additional artifacts such as Day in the Life stories and Journey Maps

- Start referring to users of your product using persona names

  - Prioritization meetings

  - Design decisions

  - Epics and user stories

Persona Creation

Your assignment

Next class is all about working on personas. Come prepared with the **attributes** you will rank your participants against
- Start with your primary persona
- Repeat for your secondary persona
- 5-10 attributes selected
- ALL your participants ranked for ALL attributes
- Groups of participants identified

Details on the course website: Persona Creation

Coming up

Persona working session

Major Project	Major Project	Major Project		Major Project	Major Project
Product Research Project Planning │ Persona Research	Persona Creation │ **Persona Working Session**	User Scenarios │ Information Architecture	Reading week	User Flows │ Ideation and Design Concept Mockups	+ 5 weeks
Week 1 of 9	Week 2 of 9	Week 3 of 9		Week 4 of 9	

Mandatory

1. **Have your persona research complete and attributes selected**
2. **Review** all material provided on personas
3. Don't miss the working session! **Ask the professor for feedback!**