Planning: Purposes, Personas, Conversations

2

Successful writers don't start by writing. They plan before they write (and they plan while they write and through all their revisions).

At every level and for every piece of content (entire site, web page, mobile app or site, social media message, blog article), start by asking yourself:

- Why?
- Who?
- What's the conversation?

Your site = you = one side of the conversation. You have to know what you want that conversation to accomplish.

Your site visitor = the other side of the conversation. To have successful conversations with your site visitors, you must understand them and what they need and want.

Planning is part of developing a content strategy. See Interlude 1 right after this chapter.

You might call what I'm covering here your creative brief.

Why? Know what you want to achieve

You may want to make money, reduce phone calls, increase phone calls, have people be able to access the site wherever they are and whenever they want, or have people come to your site before any others for your topic.

Letting Go of the Words. DOI: 10.1016/B978-0-12-385930-3.00002-9

As you state your goals,

- focus on what you want your site visitors to do
- be specific

Focus on what you want your site visitors to do

To meet your goals for the site, you must help site visitors have successful experiences. Put your goals in terms of what your site visitors should do. A few examples of what I mean:

- We want to sell a lot of shoes.
- We want people to buy shoes from us.
- We want to give out a lot of information on this topic.
- We want to answer people's questions about this topic.
- We want to increase subscriptions.
- We want site visitors to feel so engaged with us that they subscribe.

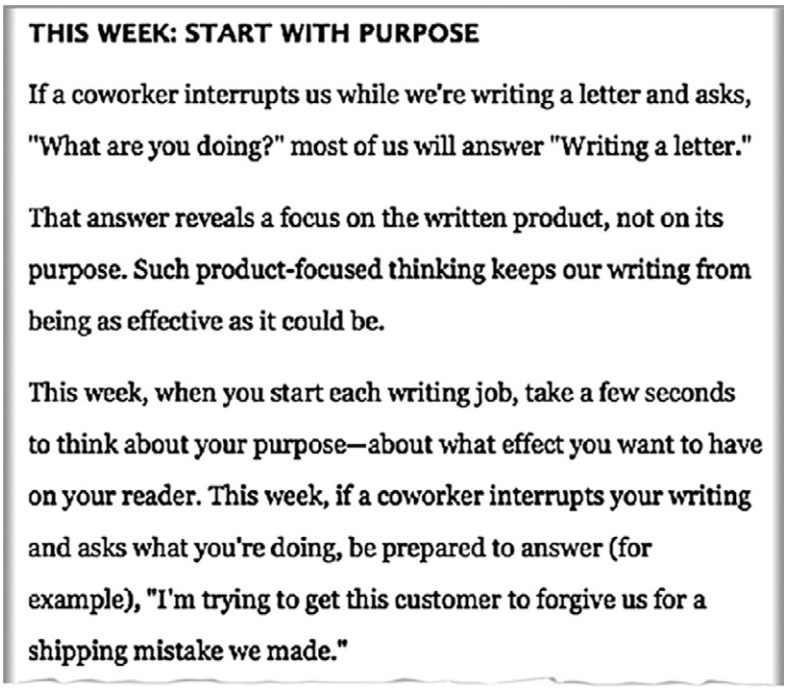
The differences here may seem subtle. But the shift of focus will help you change from only thinking about what you have to say to thinking about how to have successful conversations with your site visitors.

Be specific

When asked to explain why they are putting up a web site or specific web content, most people speak in generalities: to inform, to persuade, to educate. That's fine as a start. But it's not enough to help you select the right content or to organize and write that content so it engages and satisfies your site visitors.

Be specific. Fill in this sentence: I'm writing this so that (who?) (can do what?).

Kenneth W. Davis gives us a good example in the blog post I've included as Figure 2-1.



THIS WEEK: START WITH PURPOSE

If a coworker interrupts us while we're writing a letter and asks, "What are you doing?" most of us will answer "Writing a letter."

That answer reveals a focus on the written product, not on its purpose. Such product-focused thinking keeps our writing from being as effective as it could be.

This week, when you start each writing job, take a few seconds to think about your purpose—about what effect you want to have on your reader. This week, if a coworker interrupts your writing and asks what you're doing, be prepared to answer (for example), "I'm trying to get this customer to forgive us for a shipping mistake we made."

Figure 2-1 Being specific about your purpose helps you write well. **www.manageyourwriting.com** (Nov. 21, 2011)

Think of SEO

SEO

For most sites, coming up high in search engine results is very important. You probably want to have it on your list of purposes: We want people to find us easily in organic (not paid for) search results.

Think of universal usability

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Making your site work for all site visitors is good business. It should always be one of your purposes: We want everyone to be able to use our site easily.

Know your purposes for everything you write

You will have overall purposes for your site or app or blog. You will have even more specific purposes for each part of the site, for each piece of content, for each blog article, for each part of a mobile app, for each social media message. Always ask: What do I want to happen because I wrote this?

Who? What's the conversation?

A web site needs visitors. If no one comes to your site, all the effort you took to design and write it is for naught.

A web site is successful only if site visitors can

- find what they need
- understand what they find
- act appropriately on that understanding
- do all that in the time and effort that they are willing to spend

This is my definition of both usability and plain language. See www.usability.gov, www.plainlanguage.gov, and www.centerforplainlanguage.org.

Understanding your site visitors and their needs is critical to deciding what to write, how much to write, the vocabulary to use, and how to organize the content on your web site.

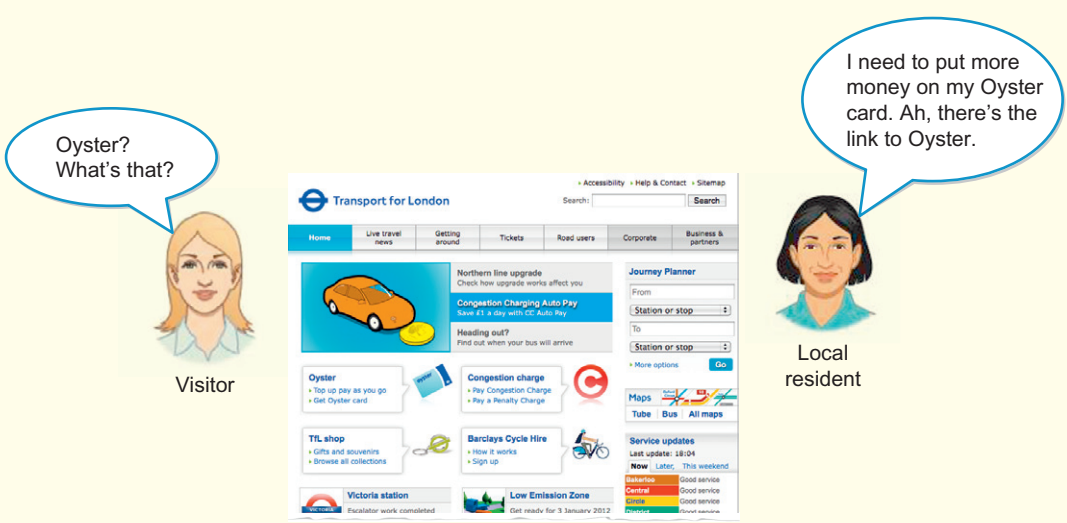
And you must remember the first law of creating successful user experiences:

We are not our users!

You may be an early adopter of new technology, eager and engaged in all manner of social media. But your typical site visitors may not be. You have to know about and understand how to meet their needs because the only way to meet your business goals is to satisfy your site visitors.

We all interpret as we read

People aren't just passive receptacles into which writers can pour information. Even when we think that we share the same language, it isn't entirely the same. We may not know the same words. We may have different meanings for the same words.



All of us interpret what we read in light of our own knowledge and experiences. (In case you don't live in London: An Oyster card is a prepaid travel card for public transportation.)

You can find out lots about your site visitors

Later in this chapter, I'll show how to turn data about your site visitors into personas and scenarios. First, let's talk about how to get that data.

To understand your site visitors, start with these four steps, which you'll probably cycle through a few times.

1. Gather information about your site visitors.
2. List groups of site visitors.
3. List major characteristics for each group.
4. Understand the conversations they want to start.

1. Gather information about your site visitors

You can start to understand your site visitors by thinking about them. But that's not enough. To really understand who they are, why they come to your site, what they need, and how to write web content for them, you have to know them and their realities.

If you write your web content based only on what you *think* your site visitors are like, you will be writing from *assumptions*. If your assumptions are wrong, your content won't work.

Here are several suggestions for finding out about your site visitors. They are all valuable, but best is actually watching, listening to, and talking with current or potential site visitors. That gives you a truer picture than any of the just thinking techniques or information filtered through other people.

For many techniques for understanding your users: Courage and Baxter, *Understanding Your Users*, 2004

- **Think about your mission.** Whom are you supposed to serve? What are you supposed to help them accomplish?
- **Read the emails** that come through Contact Us and other feedback links. Who is writing? What are they asking?
- **Read feedback** from your web pages. (Give people an easy way to send feedback on your web pages.)
- **Read reviews, recommendations, blogs** that mention your site, your topics, or where your site visitors are likely to express themselves.
- **Talk to colleagues in Customer Service.** Who is calling with questions? What are those questions?
- **Talk to colleagues in Marketing.** Whom are they targeting?

- **Talk to colleagues in Usability and User Experience.** What have they already learned in their user research?
- **Analyze your site search logs.** See what site visitors are trying to find through your site's Search box. See the words they are using to find what they need.

  On analyzing site search logs: Rosenfeld, *Search Analytics for Your Site*, 2011
- **Use web analytics.** Learn where people are coming from, where they go on your site, how long they stay, when and where they leave, and the words they search with at Google and other search engines. Web analytics give you interesting facts. However, they don't explain "why?" Did people leave a page quickly because it was wonderful and gave them just what they needed? Or did they leave quickly because their first glance told them it would not help them?

  On using web analytics: Kaushik, *Web Analytics, 2.0*, 2009
- **Use social media.** Participate in relevant online discussion groups and communities where you can raise questions to people like your site visitors.
- **Track social media conversations** that mention you, your brand, your company, your site.
- **Get people who come to the site to fill out a short questionnaire**. Ask people a few questions about themselves, why they came to the site, and whether they were successful in finding what they came for.

  On designing surveys: Dillman, Smyth, and Christian, *Internet, Mail, and Mixed-Mode Surveys*, 2008
- **Interview people** who use or might use your web site. Use these techniques:
  - **Contextual interviewing** (watch and listen as people work)
  - **Critical incident interviewing** (ask people to tell you their stories of specific times when they used the site)

  On contextual interviewing: Holtzblatt, Wendell, and Wood, *Rapid Contextual Design*, 2005; also http://www.usabilitybok.org/methods/contextual-inquiry

  On critical incident interviewing: http://en.wikipedia.org/wiki/Critical_Incident_Technique; also http://www.usabilitybok.org/methods/p2052
- **Watch and listen to people in other places.**
  - If your web site mirrors a brick-and-mortar business, observe and listen to customers in the physical location.
  - If yours is a government site, realize that government agencies often have "brick-and-mortar" equivalents. Spend time in a local office of the agency, watching and listening for whatever is relevant to your web content.
  - If your site is for a nonprofit with projects, programs, and grants, go see what your grantees' lives are really like. You may see that they have technology challenges and very hectic days. You may hear what topics are most important to them, what they value, what words they use. If you can't go out in the field yourself, talk to people who spend time with your grantees.

  On watching, listening to, and talking with people at their work or home: Hackos and Redish, *User and Task Analysis for Interface Design*, 1998
- **Do usability testing of the current content**. Watch and listen to people as they work with your site. You can have them show you tasks they

  Usability testing – Chapter 15

commonly do. You can give them tasks to try. Don't only test the navigation. Watch them work with information pages and application pages. Also ask them about themselves, their needs, and their ways of using content.

2. List groups of site visitors

One way is to ask: "How do people identify themselves with regard to my web content?" For example:

- patients, health care professionals, researchers
- parents, teachers, students
- passengers, pilots, mechanics, airport operators

Another way is to ask: "What about my site visitors will help me know what content the web site needs and how to write that content?" This may lead to listing

- experienced travelers, occasional travelers
- local residents, tourists
- lookers, bookers
- shoppers, browsers

Notice that when I list these user groups, I'm always referring to people – to human beings. Don't get caught up in naming departments, institutions, or buildings as users of your site.

Don't say that you are writing for "Finance." Finance may be a department with many people who have different jobs, different knowledge, and different needs from your web site.

3. List major characteristics for each group

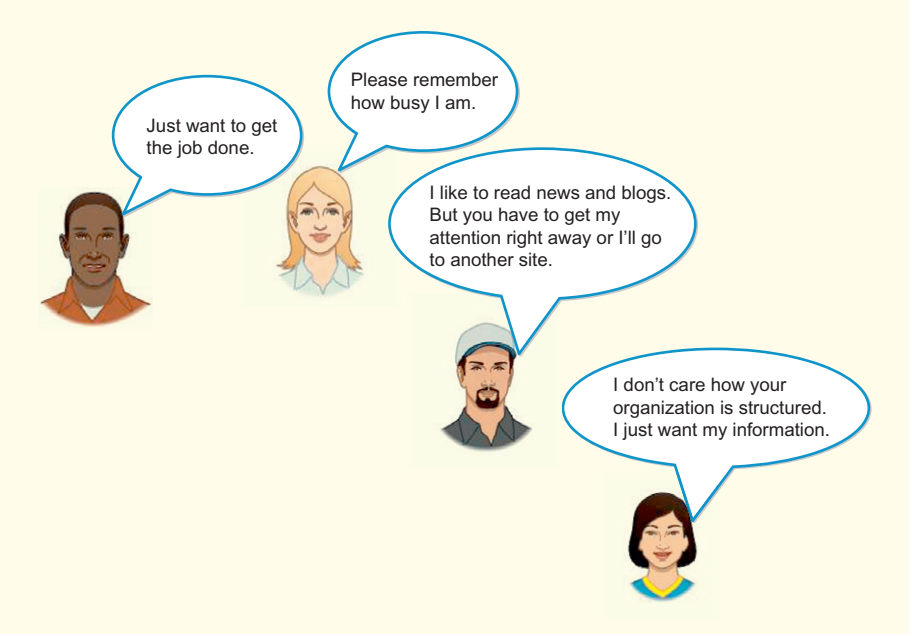
As you find out about the people who come (or should come) to your web site, list relevant characteristics for each of your user groups. Here are some categories to cover:

- key phrases or quotes
- experience, expertise
- emotions
- values
- technology

- social and cultural environments; language
- demographics (age, ability, and so on)

Key phrases or quotes

If you asked your site visitors what they want you to keep in mind about them as you write to them, what would they say?



Experience, expertise

What do your site visitors know about the subject matter? How technical should your vocabulary be?

For example, travel sites (like Travelocity, Figure 2-2) have been hugely successful partly because they don't force travelers to know airline jargon.

You may have groups with vastly different experience and expertise. You may have a range of expertise even within one type of site visitor. If you do, it's critical to know about those differences so you can decide how to meet the needs of all your site visitors. For example, the U.S. National Cancer Institute has two sets of information about every type of cancer: for patients, for health professionals (Figure 2-3).

Even for experts, conversational style and simple words work best. See the research by Summers and Summers, 2005. I show data from that research in Chapter 10.

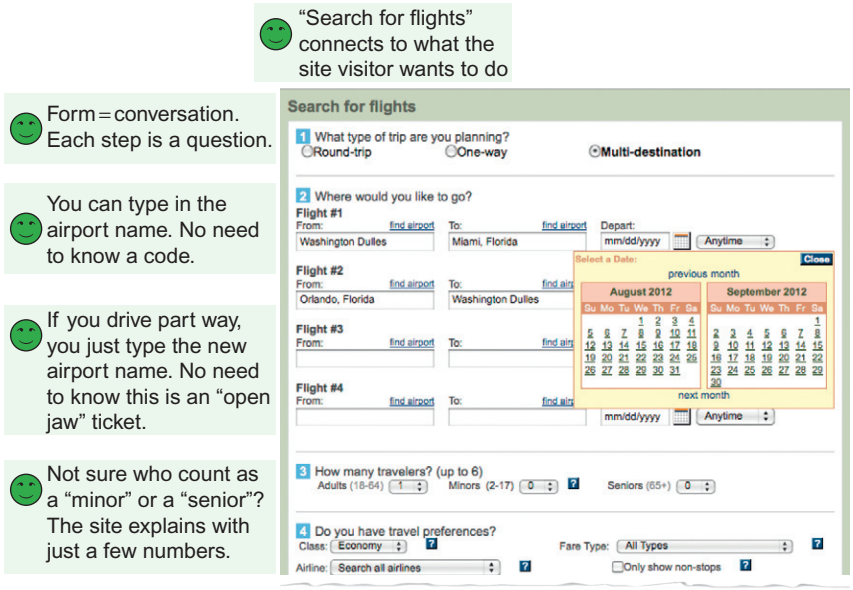


Figure 2-2 To converse well, you must understand your site visitors' expertise (and lack of expertise).
www.travelocity.com

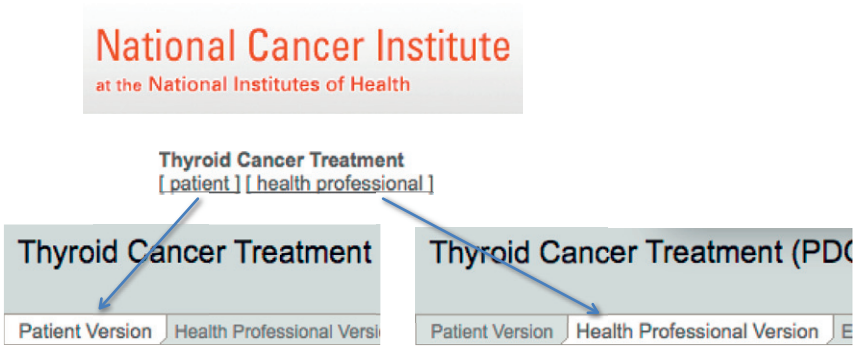


Figure 2-3 Both versions of information about each type of cancer are available to everyone, but they have different levels of detail and use different words.
www.cancer.gov

Emotions

In many situations, people's emotions are important characteristics for you to keep in mind. Your site visitors might be

- fun-loving
- passionate
- intrigued

- curious
- impatient
- angry
- deadline-driven
- nervous
- anxious
- frustrated
- skeptical
- stressed
- pressured

In Chapter 7, we'll consider writing for injured workers who are checking on their worker's compensation claims. What would you say about their emotional state?

Did you say: Anxious, nervous, skeptical about whether the agency really wants to help them?

If reporters are a major group of site visitors for you, what would you put down for them? Did you say: Deadline-driven, impatient?

What about people seeking help with a product problem (like a paper jam in the printer)? Did you say: Angry, frustrated, anxious?

If the web site focuses so strongly on marketing messages that information about customer service is hard to find, will that only frustrate these site visitors more? If your content about the problem is in convoluted, technical language, will that only make them angrier?

And what will they do if the web content doesn't help? Call up – and cost the company more money? Buy someone else's product next time? Write a scathing review on social media sites?

Web content for people who are angry, frustrated, anxious, or stressed has to be particularly clear and simple.

Values

Knowing what matters to your site visitors may help you decide what content to include and what to focus on or emphasize in the content. Knowing their values may help you understand why they don't want to read much, why letting go of the words and writing in clear, conversational style matches their needs.

Technology

What resolutions are your site visitors working at? What speeds are they connecting with? How steady is their connection? Do they pay for every minute they are on? Are most site visitors coming to your site on a smart phone? Answers to those questions will affect your web content.

Despite the tremendous growth of broadband, it is not universal. In many places, people pay for each minute of connection – they don't have unlimited access for a monthly charge.

And, of course, today you must design for screen sizes from large monitors down to small phones.

Also, of course, you can use web analytics to find information for your specific site, including what browsers your site visitors are using.

Technology changes so fast that any statistics I put here would soon be out of date. So instead of numbers, here are some web sites you can check to track technology issues like broadband, typical resolutions, and more: http://www.websiteoptimization.com/bw, http://www.w3schools.com/browser/browsers_display.asp

Social and cultural environments and language ("context of use")

You should also understand where and when people come to your content.

Are your typical site visitors likely to be

- alone or with someone else?
- in an office cubicle or at home or at the public library or walking down the street looking at their smart phone?
- in a different country or from a culture that is different from yours (even within the same country)? How well do they know the language of your site?

Are your typical site visitors likely to be

- coming directly to your site or coming through a search engine like Google? (If so, search engine optimization (SEO) will be a very important consideration.)
- very interested in participating in social media, user-generated content, and interactivity? Or would they rather just find static information or complete a task?

Are your typical site visitors likely to be

- interrupted as they work with your information? (This might be true for most office workers. It's also likely to be true for a parent shopping from home while the kids are playing.)
- on your site for a long time every day? (This would be the case for some applications.)
- answering questions for someone else, so they might have someone on the phone waiting for the answer while they try to get that answer from your content? (This would be the case with the customer service group in an e-commerce environment, for example.)

Demographics

Age may matter for your site. If you are writing content for a particular age group – for example, for young children or for teens – that will likely affect your writing style as well as the design of your site.

On designing mobile sites for children: Druin, *Mobile Technology for Children*, 2009

But age isn't all there is to demographics. Recent studies of older adults have shown how diverse the audience of 50+ or even 65+ is. Even within the older adult audience, you have to think about differences in computer and web expertise (aptitude), in feelings about the web (attitude), and in ability (vision and other problems).

On understanding older adults and the web, see the resources listed on my web site at http://redish.net/articles-slides/articles-slides-older-adults

Also remember that if you see a statistic such as 75% of 16- to 24-year-olds are active on social media sites, that means that 25% are not!

4. Understand the conversations they want to start

All of the ways I listed earlier for finding out about your site visitors give you information about both *who* they are and *why* they come to your web site. Let me add two more guidelines for helping you get your site visitors' stories.

Don't translate

As you gather people's questions, tasks, and stories, note *their* words. Don't rewrite what they say into your jargon.

Finding out the words site visitors use to describe what they want and need is critical. Then you'll have their vocabulary to use in your content.

Analyze site searches

One way to see site visitors' words is to analyze the words they use to search at your site. Site search analysis does not tell you *who* but does tell you *what* site visitors are trying to find – in their words.

Breathing life into your data with personas

When you've done the user research we've talked about so far in this chapter, you'll have a lot of facts about your site visitors. But it may be hard to imagine real people in the facts you've gathered. Do the facts seem dry? Do they lack "human interest" – a real sense of the people your content is for?

A great way to bring your web or app users "alive" for yourself and your team is to create personas.

Alan Cooper popularized personas in design. Cooper, Reimann, and Cronin, *About Face 3*, 2007

On personas: Adlin and Pruitt, *The Essential Persona Lifecycle*, 2010; Mulder, *The User Is Always Right*, 2007; Pruitt and Adlin, *The Persona Lifecycle*, 2006; http://www.usability.gov/methods/analyze_current/personas.html

What is a persona?

A persona is an individual with a name, a picture, specific demographics, and other characteristics. A persona is, however, not usually based on one actual individual. Rather, each persona is a composite of characteristics of real people in the group the persona represents.

A very important point: As you create your personas, you must be true to the data you have so that the personas represent your site visitors – not you.

Figure 2-4 introduces you to Win, one of nine personas that The Open University in the United Kingdom (OU) has for potential students whom they want to serve.

More OU personas at http://www8.open.ac.uk/about/ebusiness/strategies/accessibility-and-usability/personas

Figure 2-4 The OU team developed these personas from interviews with more than 140 potential students.
(Photo ©Ronald Summers/Shutterstock.com. Persona used with permission of Ian Roddis, Head of Online Services, The Open University, and the rest of the team that did the user research and developed the personas: Sarah Allen, Caroline Jarrett, Whitney Quesenbery, and Viki Stirling.)

Figure 2-5 on page 31 introduces you to Edith, one of eight personas from AARP (the U.S. organization that invites everyone 50 and older to join).

What makes up a persona?

To make the abstract information into a persona, add a picture and name. Then, extract the key points from the data you collected.

Picture and name

You know you have a good picture and a good name when they resonate with your web team. Be sure to select a picture and name that make the team respect the persona. Funny or cute names are signs of disrespect. You must have good conversations with your personas to write web content that will make good conversations with your actual site visitors.

Edith

- 73 years old
- retired restaurant owner
- now lives in Miami
- married almost 50 years to Doug
- limited income
- four children, ten grandchildren

"I love getting pictures of the grandkids in email, but I don't understand how the kids make that happen."

"My son, Jerry, showed me how to print out the pictures. I always follow just what he said to do."

Typical web tasks:

- email
- find health information for herself and Doug and sometimes for friends
- get information for travel – she hasn't yet actually bought online, even though the kids do it all the time and say it's very safe

Edith didn't even know there was an AARP web site until she saw something about it in the AARP magazine. The magazine said there was more travel information on the web site, and Edith likes to plan trips that include visiting grandchildren and also doing some sightseeing.

Edith and Doug get by on Social Security and what they got when they sold the restaurant.

They put down a lot of cash for their small retirement house to keep the payments low.

Edith and Doug are enjoying retirement. They like the slow pace (especially after all those hectic years in the restaurant). They like the sunshine and the social life.

Edith is a cautious web user.

She checks her email regularly because the children are so busy that they don't come to visit or call as often as she would like – but they do send email.

Edith uses hearing aids and glasses. She took off the glasses for the picture, but she needs them to read or look at the computer. She has slight arthritis in her hands, so sometimes using the mouse is a problem.

Figure 2-5 Edith represents the older (but not oldest) retired part of AARP's site visitors. **(Used with permission)**

You can buy or license stock photography, but many teams find that casual, personal photos are better than photos of models. You may find appropriate pictures at photo sharing sites like Flickr. Just be sure the picture is being shared under the Creative Commons license that gives permissions for the way you will use the photo.

Photos of friends or family often work well, but don't use a picture of someone the team knows. They'll find it too hard to talk about "Jack" if they know it's really a picture of Lisa's brother Mike. Also, be sure to have the person's permission to use the photo.

Demographics

Demographics (age, family status, education level, and so on) are important, both to identify which groups of site visitors the persona represents and to make the persona "real" to everyone.

Quotes, values, stories, tasks, and more

Use the data you gathered. Include whatever is going to be important to the team as they design and write. In this chapter, you see just a few of many ways to present personas:

- Win's persona has questions and answers.
- Edith's persona has a quote, a bulleted list, and a short narrative.
- The posters for Ari, Valerie, and Susan (Figure 2-6 on page 33) have different colored backgrounds to help distinguish them.

How many personas?

Most of the web sites I have helped have several primary site visitor groups and, therefore, find they need more than one major persona.

- As you just saw, the OU has nine personas for potential students. AARP has eight personas for its members and potential members.
- Gina Pearson's group at the U.S. Energy Information Administration has six personas, including one for Data Hound, a software robot.
- Ahava Leibtag helped Sharath Cherian and his team develop six personas for HipHopDX, a site for new hip hop music, news, and all things rap and hip hop.

AAA ACCESS

You may want to have a persona who uses assistive technology, such as a screen-reader or screen magnifier. Although the persona's special need will be only one of many special needs among all your potential site visitors, your persona (for example, someone with vision problems) will remind the web team to always make sure that everything on the site is accessible to everyone.

How do personas work with a web team?

For your home page, you probably need to keep all your personas in mind. For a specific web page, you may be conversing with only one or a few of the site's personas.

Personas become members of your web team. Figure 2-6 shows how one team keeps their persona in clear view as they work.

Figure 2-6 Gina Pearson, Staci Lewis, and Robert Ciconte keep their personas with them as they plan and design.
(U.S. Energy Information Administration; Used with permission)

Instead of talking generically about "users" for your web content, you start talking about your personas by name.

- What questions will Kristin ask about these shoes we want her to buy?
- When Sanjay comes to this web site, will he search or navigate? What search terms will he use to get to the content I am writing?

These are just a few of the ways that personas have become members of web teams:

- Personas come to team meetings as life-size cardboard cutouts.
- Personas' pictures and information hang on the wall in the team's work space. The social media strategist for HipHopDX has done that, and Ahava Leibtag (their content strategy consultant) says that contributed to their 47% increase in traffic in the past year.
- Personas' pictures and information are printed on place mats or mouse pads so that they are on the table at meetings and in team members' work spaces.
- Emails from personas and about them circulate in the team.

Breathing life into your data with scenarios

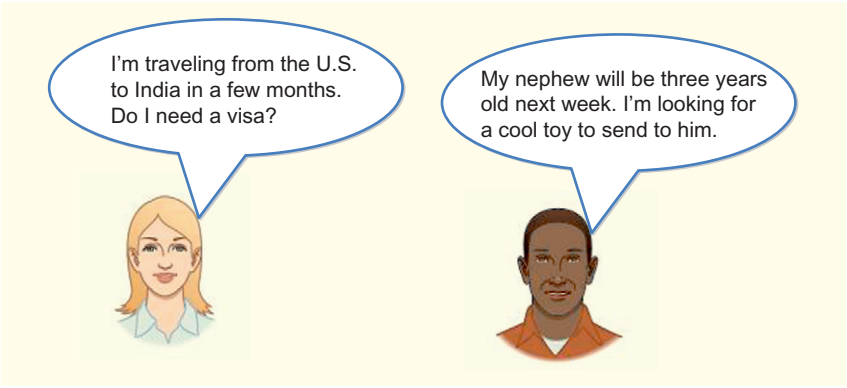
Your persona descriptions should include the persona's most common reasons for coming to your web site. (Look back at Win and Edith.)

As you plan your web content, however, you should move from simple lists of goals, tasks, and questions to scenarios (stories, conversations). Scenarios give life to these lists in the same way that personas give life to other data about your site visitors.

On storytelling for designing great user experiences: Quesenbery and Brooks, *Storytelling for User Experience*, 2010

How long? How many?

Scenarios can be as short as the two sentences in each bubble below or as long as the stories about Mark and Mariella on the next pages.



If you have developed one or more major personas for your site, you should have several scenarios for each of them.

Scenarios for whom?

You may also want to have scenarios for a few secondary personas. For example, if your main personas are frequent shoppers and casual shoppers but you also have investors and reporters coming to the site, you may want to do "mini-personas" for them along with their scenarios.

Do the mini-personas with scenarios in Figures 2-7 and 2-8 give you a sense of these people and their lives? Would they be helpful to you in creating web sites for people like them?

How do scenarios relate to content?

Everything on your web site should relate to at least one scenario, one conversation that a site visitor would want to start. If no one needs or wants the information – if there is no plausible site visitor's conversation

Mark Williams is a sales coordinator for one of the divisions of FGH Corporation. His job, like that of most of his friends, includes many different responsibilities. He often feels as if he's juggling tasks all day long.

Today he's trying to put together some projections that his boss wants "immediately." But Mark also has to deal with questions that his staff can't handle on their own, and that often involves looking up policies on the company's intranet.

The telephone just interrupted Mark's work on the projections for his boss. It's Anu Pati out in the field negotiating a deal with a client. Anu needs to know whether company policy allows her to offer volume discounts to this client and what those discounts can be.

Mark needs to find the right policy quickly both to keep Anu and her potential client happy and because he wants to get back to the job for the boss. He also hopes the policy is clearly stated so he and Anu are both confident they are giving the client correct information.

Figure 2-7 A scenario for developing an intranet site

Don and Mariella Garcia just had their second baby so they need a bigger car. Don's construction work is going well, but Mariella is staying home for a while, so they're worried about money. They're going to need a loan to buy the new car and they want a good deal.

Mariella knows about computers and the web from the job she was doing before she got married. But she can only go look on the web in spurts – when the children are napping or late at night when Don can look with her. And then they are both very tired.

They're not financial experts; they don't know all the banking terms that some of these sites use. They're trying to find a site with good loans that talks to them with words they understand.

Figure 2-8 A scenario for developing a banking or credit union site

for the content – why have it on the site? It's only taking up server space and perhaps showing up in search results where it distracts people from what they really need.

Scenarios can help you

- realize how goal-oriented most site visitors are
- focus on what is important to your site visitors
- write your content as conversation
- write with your site visitors' words

Summarizing Chapter 2

Key messages from Chapter 2:

- Planning your content is critical for apps, web sites, individual web topics, blogs, social media messages – everything you write.
- Planning means asking: Why? Who? What conversations?
- To have successful conversations, you have to know
  - what you want to achieve through your content
  - who you are conversing with
  - what they want from your app, your site, your topic, your message; what task they want to accomplish
- List all your purposes. Try to make them measurable.
- Understand that your readers are not blank slates. We all interpret as we read, bringing the baggage of our past experience and our own understanding of what words mean.
- Know your readers.
  - You have many ways to learn about your site visitors.
  - Gathering data from real sources from analytics to social media to site visits and usability testing is much better than making assumptions about your site visitors.
- List major characteristics for each group of site visitors, including:
  - key phrases or quotes
  - experience, expertise
  - emotions
  - values
  - technology
  - social and cultural environments and language
  - demographics
- Gather site visitors' questions, tasks, and stories.
- Use your information to create personas.
- Use your information to write scenarios.
  - Scenarios tell you the conversations people want to start.
  - Everything on your site should fulfill a scenario.
  - Scenarios can help you write good content.