

# Synthesizing Research

## Learning Objectives

- › Use research to **create an affinity map**.
- › **Articulate** the benefits of using personas
- › Use research to **create personas** that reflect the target audience.
- › Solidify a **problem statement & hypothesis**.
- › Understand how to use an **experience map**

# Synthesizing Research

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3

*In synthesis, you're trying to find meaning in your data. This is often a messy process – and can mean reading between the lines and not taking a quote or something observed at face value.*

*The why behind a piece of data is always more important than the what.*

**Lauren Serota**



# Documenting Your Research

# **Consolidate and Communicate**

- Take pictures
- Jot down post-interview notes
- Pull out key quotes
- Use affinity mapping to identify trends
- Use storyboarding to communicate a user's experience
- Articulate your Problem Statement and Design Direction

## **Post-interview notes**

Three most memorable points:

1)

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2)

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3)

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# SYNTHESIZE YOUR NOTES

## BEHAVIORS

Observations of peoples' actions throughout the experience

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_

7. \_\_\_\_\_

8. \_\_\_\_\_

9. \_\_\_\_\_

10. \_\_\_\_\_

## QUOTES

Exact phrases people said that reflect their experience

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

# SYNTHESIZE YOUR NOTES CONT.

## LIKES

How about things your user liked?

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_

7. \_\_\_\_\_

8. \_\_\_\_\_

9. \_\_\_\_\_

10. \_\_\_\_\_

## DISLIKES

How about things your user disliked?

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_

7. \_\_\_\_\_

8. \_\_\_\_\_

9. \_\_\_\_\_

10. \_\_\_\_\_

## Pull Quotes

- Help you craft a narrative around your research
- Adds credibility
- Promotes empathy
- Very effective in stakeholder presentations
- Can be used in personas

I went to the website, but I couldn't find what I was looking for. Then I got distracted before I could finish writing the help email, so I just never went back.

I do all my shopping online but I still love to go into the store. There is something about being able to see how it all works together

## For More Detail...

- ▶ Record and transcribe your interviews
- ▶ Use different colors to highlight:
  - ▶ Sentiment (feelings)
  - ▶ Behaviors
  - ▶ Motivations
  - ▶ Tasks
  - ▶ Goals

S2 22:00  
S1 22:02  
  
S2 22:09  
  
S1 22:20  
  
S2 22:27  
S1 22:30  
S2 22:32  
  
S1 22:39  
  
S2 22:52  
  
S1 23:14  
S2 23:14

**Transcribe Me!**

They are important to us as an archive.  
So, when you keep them in you database, they then get published to your research group's website or are they still private?  
Once basically the paper gets accepted, or generally speaking it's when the paper gets accepted, it goes to our achievement section or something.  
Okay, I need to take a look at your website, because it sounds like it's probably the best administered one that I've heard of, that I'll be able to find.  
[?] Tangible Media and we have a paper section.  
And it looks nice, too.  
And Jonathan and some of the students came up with the shell for this. I don't know exactly who came up with the shell.  
I have actually—somebody else has shown me this one. I can't remember who. But they loved the timeline, because it showed that these projects - it's not like once a project starts it's around forever.  
Yeah, exactly. So, I think to do with timeline thing, I mean, people should be familiar with timelines as of this rate, because of things like Twitter. It needs to operate on that same sort of string where you can have like a ribbon of things like that. Just certain things in the website are useless, like the people page.  
You never use that?  
Even staff and things like that. And you click on this, you can't even do anything to these names that are on the page. They're just a bunch of boxes, like what's the point of this? Why don't we just have the directory up there? Every other group at MIT has a page



## **OBJECTIVE(S)**

Synthesize your research interviews from earlier.

## **DO NOW**

15 min     Get into your groups

Using the worksheet, start to synthesize your notes from yesterday's interviews

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**SYNTHESIZING RESEARCH**

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# **AFFINITY MAPPING**

# A WAY TO FIND PATTERNS IN QUALITATIVE DATA





# AFFINITY MAPPING STARTER GUIDE:

- **Step #1:**
  - Write down one observation per post-it note.
  - TIP: Use the quotes, behaviors, likes, and dislikes from your worksheet.
- **Step #2:**
  - Place observations into groupings based on similarities and trends.
- **Step #3:**
  - Refine and rename your groupings as many times as needed until the insights emerges.

## IDENTIFYING THE INSIGHTS

Look through your notes from each interview to identify:

› **Motivations**

- › Goals
- › “If...then’s”
- › Context/Surroundings
- › Emotions
- › Preferences

› **Behaviors**

- › Actions
- › “This...then’s”

# **POST-IT NOTE ETIQUETTE**

**WRITE IN  
SHARPIE  
ONLY**

# ONLY ONE OBSERVATION PER POST-IT

# WRITE IN ALL-CAPS

so it's legible to all

# USE COLOR TO CATEGORIZE DATA

you can see if issues are shared by multiple people at a glance



## IDENTIFYING INSIGHTS

USES VENMO  
INSTEAD OF  
PAYPAL

EATS PIZZA  
EVERYDAY

EATS  
BREAKFAST  
IN THE CAR

PREFERS  
WORK OVER  
SOCIAL LIFE

USES  
HANGOUTS  
INSTEAD OF  
PHONE

PREFERS  
CHAT OVER  
PHONE

PREFERS  
CATS OVER  
DOGS

USES  
SERVICES  
INSTEAD OF  
CASH

EATS AT  
IRREGULAR  
HOURS

## IDENTIFYING INSIGHTS

User 1

PREFERS  
CHAT OVER  
PHONE

USES VENMO  
INSTEAD OF  
PAYPAL

EATS PIZZA  
EVERYDAY

User 2

PREFERS  
CATS OVER  
DOGS

EATS  
BREAKFAST  
IN THE CAR

USES  
SERVICES  
INSTEAD OF  
CASH

User 3

EATS AT  
IRREGULAR  
HOURS

PREFERS  
WORK OVER  
SOCIAL LIFE

USES  
HANGOUTS  
INSTEAD OF  
PHONE

## IDENTIFYING INSIGHTS

### Preferences

PREFERS  
CHAT OVER  
PHONE

### Eating

EATS AT  
IRREGULAR  
HOURS

### Usage

USES VENMO  
INSTEAD OF  
PAYPAL

PREFERS  
CATS OVER  
DOGS

PREFERS  
WORK OVER  
SOCIAL LIFE

EATS  
BREAKFAST  
IN THE CAR

EATS PIZZA  
EVERYDAY

USES  
SERVICES  
INSTEAD OF  
CASH

USES  
HANGOUTS  
INSTEAD OF  
PHONE

## IDENTIFYING INSIGHTS

“I don’t take good care of my health”

EATS AT IRREGULAR HOURS

EATS PIZZA EVERYDAY

EATS BREAKFAST IN THE CAR

“I don’t invest in high maintenance relationships”

PREFERS CATS OVER DOGS

PREFERS WORK OVER SOCIAL LIFE

“I am highly connected”

PREFERS CHAT OVER PHONE

USES VENMO INSTEAD OF PAYPAL

USES SERVICES INSTEAD OF CASH

USES HANGOUTS INSTEAD OF PHONE

# USING “I” STATEMENTS

- States the insight from the user's point of view
- Makes it about real people, not just “data”
- Makes it gut-checkable

“This person doesn't take good care of their health”

v

“I don't take good care of my health”

## WEAK GROUPINGS

- Groups with too few data points are weak
- Groups with too many data points are weak
- Groups formed entirely by data from one user is weak
- Weak groupings suggest that more research is needed



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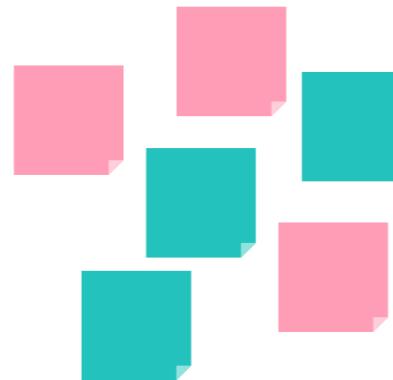
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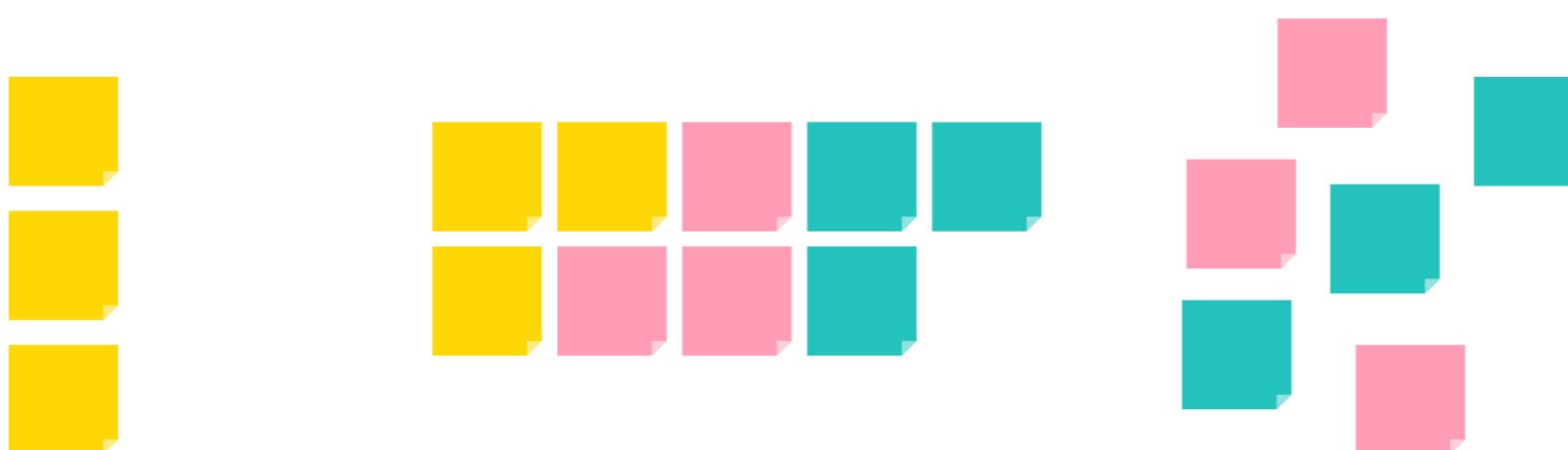
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# COLLABORATING

- Use affinity mapping to share and synthesize data from multiple sources
- Work silently to allow each teammate's perspective to be reflected by the diagram
- Any group that the entire team can't abide by should be reorganized
- Timebox the exercise

# Affinity Mapping

**10 minutes** Download your notes from your first interviews by writing individual observations on post-it notes. Try to focus on Observations, Problems, Opportunities, Needs and Quotes.

**10 minutes** Sort ideas and concepts into themes. Start with Observations, Problems, Opportunities, Needs and Quotes.

**10 minutes** Once you've captured the above, feel free to re-sort with into different categories of your choice.

**Tip:** Download Post-It App or Realtime Board App to capture digital version of your affinity map.



# Q&A



## Raw Notes

“

Navigating the insurance companies—I really needed help with that. Up until that point, I hadn't given it any thought. Like picking a plan, will they cover, won't they cover, premiums... My mom knew, because my dad had cancer. But for whatever reason, she wasn't really interested in helping me. I had to do it all myself. I wish there had been a resource that I could have sat down with that would say, 'this is what kind of plan you need, these are your needs.' I felt very overwhelmed. Particularly when I was dealing with the company in DC, where they wouldn't terminate my coverage but also wouldn't cover what I needed in MA. I didn't know what to do. All I did was kept calling and harassing them. It would have been great if someone could have stepped in at that point.

- Anne

# Raw Notes

66

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Positive



Neutral



Negative

- Anne

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# Data Points

"I wish there had been a resource to say, 'this is what kind of plan you need'" ANNE

"Up until that point, I hadn't given [ins] any thought."

ANNE

Mom didn't help her with her insurance

ANNE

"I felt very overwhelmed."

ANNE

Wanted help cancelling her DC insurance and getting MA coverage ANNE

Her mom knew how to handle insurance from dad's cancer

ANNE

"I didn't know what to do"

ANNE

DC ins wouldn't terminate my cov but also wouldn't cover what I needed in MA.

ANNE

"I kept calling and harassing them"

ANNE

Positive Neutral Negative Needs/Wishes

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"It seemed like I was just kind of a pain to my case manager."

WONIYA

Two Chairs made it easy for her to find a therapist

LIZ

Wanted help cancelling her DC insurance and getting MA coverage

ANNE

Her mom knew how to handle insurance from dad's cancer

ANNE

"I didn't know what to do"

ANNE

DC ins wouldn't terminate my cov but also wouldn't cover what I needed in MA.

ANNE

"I have no idea what's next. I feel like things are on hold, which is really sad."

YVONNE

"It would have been great to have more follow up on their end. I was really sick." WONIYA

"I kept calling and harassing them"

ANNE

Positive      Neutral      Negative      Needs/Wishes

# Patterns & Themes

"I wish there had been a resource to say, 'this is what kind of plan you need'" ANNE

Two Chairs made it easy for her to find a therapist LIZ

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"It seemed like I was just kind of a pain to my case manager." WONIYA

"I felt very overwhelmed." ANNE

They want a helping hand

They want to know what comes next

"I have no idea what's next. I feel like things are on hold, which is really sad." YVONNE

"I didn't know what to do" ANNE

"I kept calling and harassing them" ANNE

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"It seemed like I was just kind of a pain to my case manager." WONYA

"I felt very overwhelmed." ANNE

## Provide visibility

"I have no idea what's next. I feel like things are on hold, which is really sad." YVONNE

"I didn't know what to do"

"I kept calling and harassing them" ANNE

"Up until that point, I hadn't given [ins] any thought." ANNE

DC ins wouldn't terminate my cov but also wouldn't cover what I needed in MA. ANNE

## Be an ally

# Personas

# WHAT ARE PERSONAS?

*A persona is a user archetype you can use to help guide decisions about product features, navigation, interactions, and even visual design.*

**KIM GOODWIN**



# Personas

- **Construct a persona that you care about.** You want something people can empathize with...
- **Keeps you focused on your key users.** Instead of, "This software could do this, and this, and this..." try, "What would this persona need to do with this product?"
- **Keep you from designing for yourself.** They help you tailor your designs to your target audience.
- **A tool for stakeholder alignment.** Getting everyone on the same page about who the user actually is, versus who they think it is.



**ERIN** Age: 30  
Kindergarten Teacher  
Married, No Children  
Jersey City, NJ

**SUMMARY**  
Erin learned by her parents to recycle at an early age. As a child, her family consumed lots of soda. Her father would crush the cans, take the kids to the recycling center and get paid in \$2 bills. Her father made the act of recycling fun and a bit like an adventure. Her husband is a vegetarian who consumes lots of compostable material but cannot compost since they live in an apartment with no access to a backyard. Numerous times, they've tried to join local gardening groups but had to give up when no one would get back to them. She admits that she is lazy and uses Fresh Direct to save her walking up four floors with groceries. She feels somewhat guilty, since the service produces lots of packaging waste, although she does recycle this.

**NEEDS**

- Would like to find recycling options for items not picked up by her local town
- Reliable place to learn more about recycling rules
- To see that her individual effort is making a difference

**DILIGENT BUT FRUSTRATED RECYCLER**  
Will go the extra mile to recycle. Tension between recycling aspirations & the reality of daily life.



**TISHON** Age: 40  
Executive Creative Director  
AKQA, NY  
Based on Parker, Bob & Ray

**“Successful people never reach their goals alone.”**

Tishon is a 40-year-old Executive Creative Director at AKQA, who lives on the Upper West Side with his wife and two children. He runs the NY office and is widely recognized in the industry as an award-winning creative person. He loves his job because he gets to work with some of the most brilliant people in the business. He follows Apple and CreativityOnline.com, and his new passion is wearable technology. He is really excited about the Apple Watch.

Tishon forces himself to have a work-life balance. He decreases the hours that he spends at the office by making sure that his time is spent more efficiently and intensely. As a result, he has the time to help foster the growth of the next generation of creatives. He loves mentoring because it finds a huge rewarding emotionally. He benefited from the mentorship of others growing up and wants to pay it forward. Professionally, it's also a great way to recruit the best talent. Tishon mentors students from the University of Michigan. Beyond work, he enjoys reading books and being a unique, unfiltered perspective to the table. Culturally, they also keep him in “The loop”.

**KEY CHARACTERISTICS**

- Motivational, assertive leader
- Thrives on the recognition aspect of his life and very well paid
- Excited about waking up and going to work everyday
- Gets satisfaction from giving back to the younger creative generation

**GOALS**

- Continue creating innovative, award-winning work
- Find a balance between work and personal life
- Balance his professional and personal life

**FRUSTRATIONS**

- Has very limited free time
- Sometimes he feels like he has too much on his plate
- Works in a very high pressure environment



**PERSONA**  
Age: 29  
Job: Promotion Manager  
Location: Chicago, IL  
Status: Single

**“I am trying harder to let friends know that I am thinking of them and that they are still important to me.”**

She works as a Promotion Manager at an Ad agency in Chicago. She is very close to her mom and sister, but has a hard time staying connected with her grandparents and friends, because her job is so demanding.

**Pain Points**

- Now that she has more responsibilities at work, she has less time to call her old friends and she has a hard time connecting with friends via social media.
- She has a hard time remembering to call old friends. She usually forgets to call them because she sees an Instagram post showing the great things they've been to.
- She has a hard time connecting with her friends because she doesn't have time to call them or text them, and she doesn't speak with them frequently enough on the phone.

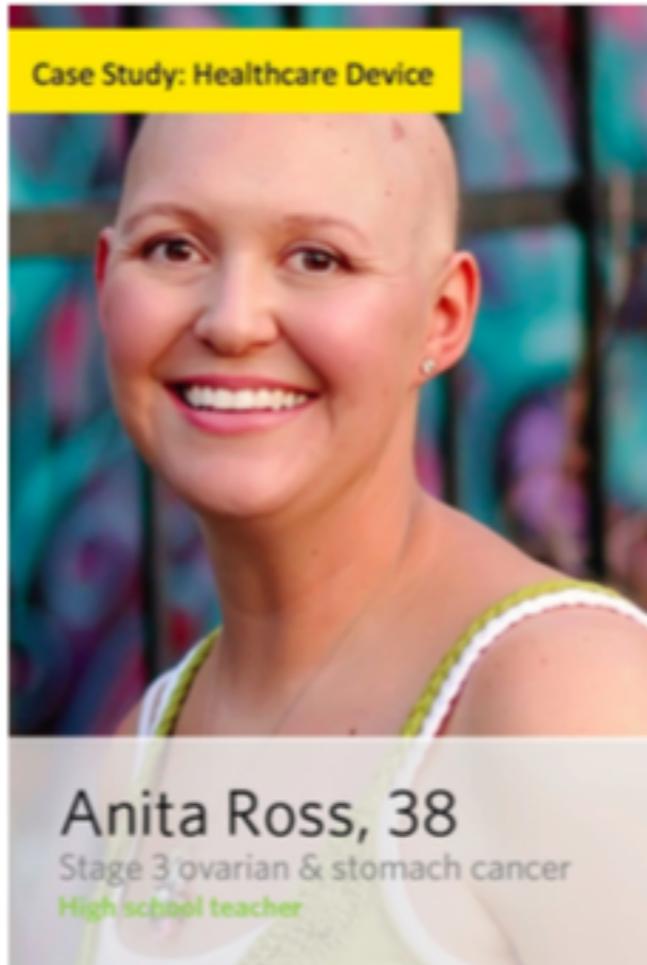
**Feelings**

- She wants to keep better track of the time she has to call her friend, email or called her friend.
- She is in constant contact with her Mother and Sister because they all live in the same city and she doesn't speak with them frequently enough on the phone.

**Goals**

- She wants to keep better track of the time she has to call her friend, email or called her friend.
- She is in constant contact with her Mother and Sister because they all live in the same city and she doesn't speak with them frequently enough on the phone.
- Does not want too much time to pass between contact.

- + User archetypes - represent the **specific needs** of many individuals
- + Based on **behavior patterns** observed in research
- + **Clear articulation of insights** about users, customers and organizations brings the big opportunities into focus
- + Used as **design and communication tools** throughout the project
- + Enable us to **drive our ideas** from data about real people



“ My oncologist should help me understand everything.”

#### Goals

- + Feel confident and in control of her treatment decisions
- + Understand her illness and treatment
- + Actively look for the latest treatment options

Personas help answer:

“Who are we designing for?”



# What is a PERSONA?

Personas are fictional characters based on behaviours and motivations of real people we've observed through user research.

Personas are NOT a market segments

Personas are NOT averages

# How can you use personas in your work?

## To build empathy.

Internalize user's needs,  
goals, challenges.

Build a more targeted solution.

## To develop focus.

If you design for everyone, you  
risk designing for no one.

If multiple users, who should  
we focus on primarily?

## To communicate and form consensus.

Multidisciplinary teams =  
vastly different expertise,  
knowledge, and perspectives.

Personas bring all members of  
a team on the same page.

# How can you use personas in your work?

## To make and defend decisions.

Determine what is useful vs. what is an edge case.

Defend decisions based on real data and research on users.

## To measure effectiveness.

Can be stand-in proxies for users when budget or time doesn't allow for an iterative process.

“Test” a design by pairing a persona with a scenario.

What would Aliah do?...



[Shlomo Goltz 2014](#)

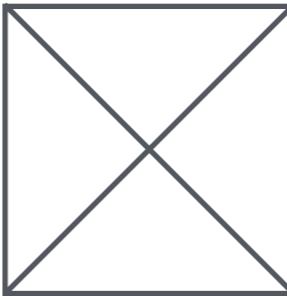
## WHAT DO THEY INCLUDE?

- A name and photo
- Demographic information
- Goals and needs
- Preferences
- A brief description of that user's ideal experience
- ...and whatever else is important

# WHAT ARE PERSONAS?

50

- Name
- Tagline
- Who are they?
- What is their context?
- What is important to them?
- What are their pain points?



**Firstname Lastname**  
Tagline

Bio & Demographics	Behaviours
Stories & Scenarios	Goals / Needs

# Ella Dunne



Age 33

Occupation Teacher

Civil Status Single

Location Canada

"I go to my friendly local game store a lot for trying out games so I like to support them."

## Behaviours

Ella is a semi-regular at the Toronto Boardgame Group, where they meet up weekly at the local game store. She goes there twice a month to try out new games and spend time with her friends.

Ella is a practical shopper and wants to get the best possible deal when buying a game. She compares prices by visiting websites that aggregate games from different publishers.

In addition to price, the most important factors for her are the game's mechanics and its ranking on BoardGameGeek.com.

She only visits publisher's websites to find out more about the game and to purchase replacement components.

Gaming Noob

Practical Shopper

Meetup Regular

Sky's the Limit

## Goals

- Find out as much as she can about a game to help her make a decision to purchase.
- Get the best possible deal when buying a game.
- Assurance that her credit card details won't get compromised.

## Frustrations

- Difficulty navigating the publisher's website. Cannot find the information she is looking for.
- Gets automatically included in mailing lists when purchasing items from publisher's website.
- Shipping prices to Canada are too high.

Buys new games once every 3 months

For personal use

As gift to someone else

# EXAMPLE

*"This is a persona I created for a book app that allows book lovers to discover new books based on their reading preferences."*



## Nerdy Nina

"The book is way better than the movie!"

#booklover

#bookaddict

#booknerdproblems

### DEMOGRAPHICS

Age: 25  
Location: São Paulo, Brazil  
Education: Software Engineer  
Job: Q/A at Indie Game Company  
Family: Lives with her boyfriend

### TECH

Internet  
Social Networks  
Messaging  
Games  
Online Shopping



### GOALS

- Discovering new books / authors to read
- Finding unique stories
- Cataloging book collection

### FRUSTRATIONS

- Keeping track of different series
- Forgetting a book launch date
- Finding space for more books

### READING HABITS

- Fast pace reader
- Never lends books
- Likes hardcovers and boxed collections
- Pre-order books to get them first
- Reads eBooks, but prefer physical copies
- Always finishes a book
- Loves binge reading and re-reading

### FAVORITE BOOKS



American Gods  
Neil Gaiman



Harry Potter  
J.K. Rowling



Ready Player One  
Ernest Cline

# EXAMPLE

*“These are the key four personas that embody Shopify Plus customers”*

The image displays four cards, each representing a different persona for Shopify Plus customers:

- Trainee (Green Card):** "THE UPGRADE TRAINEE". Illustration of a person squatting with a kettlebell. Description: Growing company with a small team. They're budget conscious and have high expectations of Plus. Often on upgrade from another Shopify plan. Needs: Reassurance of the value add of Plus, Business nature, customer support, Resources for marketing and growth, Close relationship with AM and support, Theme design support. Deal Killers: High price, Too similar to Shopify Unlimited. Design: Support needed. Dev: Support needed. Point of Contact: Founder, Partner. Sales Cycle: Short.
- Sprinter (Red Card):** "QUICK GROWTH SPRINTER". Illustration of a person running. Description: As a young company, the Sprinter has experienced rapid growth in a short amount of time (1st year). Looking for an out-of-the-box solution so they can focus on continued growth. Needs: Out-of-the-box solution that works, Knowledgeable assistance to maintain growth, Time saving resources and solutions, Multiple Shopify stores for global reach, Priority support. Deal Killers: Too similar to the Unlimited plan, Additional costs (e.g. apps, themes). Design: Support needed. Dev: Support needed. Point of Contact: Founder, Co-founder. Sales Cycle: Short.
- Relay (Purple Card):** "EVER CHANGING RELAY". Illustration of two hands passing a baton. Description: Young business (2-3 years) that has tried another e-commerce solution. They likely have multiple Shopify accounts to support multi-currency/wholesale. Looking for a cost effective product that will support their stable growth. Needs: Stability (high uptime), Ecosystem migration from other platforms, Onboarding assistance, Trustworthy relationship with Shopify, Detailed reports for growth. Deal Killers: Fear of change, Required 1-year contract, Migration and integration costs. Design: Support needed. Dev: Support needed. Point of Contact: Head of e-commerce, Founder. Sales Cycle: Medium.
- Marathon (Blue Card):** "STEADY GROWTH MARATHON". Illustration of a person running. Description: Well-established team players that have been around for over 5 years. Continues to experience long term, stable growth selling from multiple sales channels. They're informed spenders who are willing to invest more. Needs: Great support docs, Flexible APIs, Highly responsive dev and admin, Seamless integration between sales channels, Stability (high uptime). Deal Killers: Fear of change, Low subscription fees, Technical limitations (inventory, integrations). Design: Support needed. Dev: Support needed. Point of Contact: Head of e-commerce, COO. Sales Cycle: Long.

# Personas

## Personas May Include Scenarios

- Is there any important context you need to call out? Describe WHAT they would do, and WHY they would do it, but also make sure you mention the context of the situation. Where are they when this is all happening? Is there a device involved?
- Be specific. Personas should be specific enough that they reflect a mixture of all the research you performed.
- You'll need at least 8 interviews to create a solid persona



# How to use personas

- **Steer away from the ‘elastic user’**
- **Have them up in your space and refer to them in your design process**
- **Write out scenarios for personas**
- **Role play experiences with personas**
- **Reference them in team conversations**

# CREATING AND USING PERSONAS

## THE PROCESS

1. Create affinity diagrams
2. Create personas to represent a user from each group
3. Prioritize your personas
4. Validate them
5. Keep them alive

# CREATING PERSONAS

- What are the groups that naturally form?
- What are their shared characteristics?
  - Frequency of use
  - Expertise
  - Geography
- Not just demographic!



*Uses Facebook  
10+ times/day*

*Addicted Instagram  
& Snapchat*

*Uses Reddit  
& GitHub*

**IF YOU'RE DESIGNING A NEW SOCIAL MEDIA APP, WHO IS INCLUDED?**

A photograph of four diverse individuals networking outdoors at sunset. On the left, a man in a light blue shirt and glasses holds a small device. Next to him is a woman in a white top and sunglasses. In the center, a man in a camouflage jacket and sunglasses is smiling. On the right, a man in a brown vest and sunglasses is clapping his hands. The background is a bright, hazy sunset.

*MBA student*

*Marketing  
Associate*

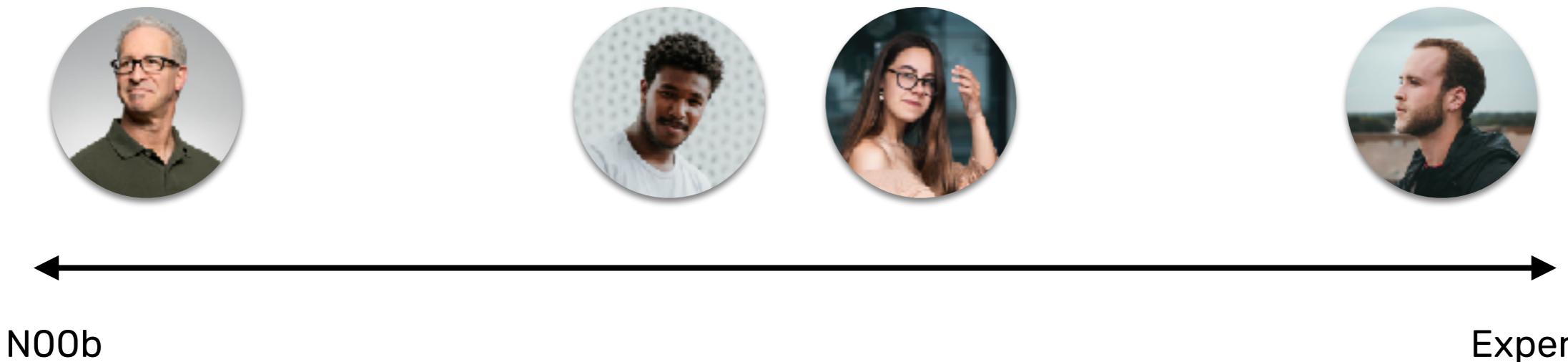
*Sales Manager*

*UX Designer*

**IF YOU'RE DESIGNING A NETWORKING SITE, HOW MANY PERSONAS?**

## CHARACTERISTICS ON CONTINUUMS

**Computer and IT Experience**



## CHARACTERISTICS ON CONTINUUMS

**Frequency of Browsing**



Once a week

Every day

## 3. PRIORITIZE PERSONAS



Primary



Secondary



Special

# VALIDATE THEM

- Do a quick gut-check:
  - Are they based on research?
  - Do I know people like this?
  - Are they useful?
- Role-play as a persona – still realistic?
- Continually refine your personas

# KEEP THEM ALIVE

- Make posters and display them prominently
- Refer to them in presentations and documentation
- Use them in casual product discussions

What would  
Aliah do?...



If you don't have a real user to photograph,  
where do you get photos for personas?

- ▶ [unsplash.com](https://unsplash.com)
- ▶ [imcreator.com/free](https://imcreator.com/free)
- ▶ [pexels.com](https://pexels.com)

**Are there templates for creating personas?  
... yes! But customize it.**

- [xtensio.com/user-persona](http://xtensio.com/user-persona)
- [hubspot.com/make-my-persona](http://hubspot.com/make-my-persona)
- [personapp.io](http://personapp.io)
- [compose.ly/strategy/user-persona-guide](http://compose.ly/strategy/user-persona-guide)

# LET'S TRY IT



# Personas: Day in the Life

- **Bring your persona to life.** Write a "day in the life" outlining a particular context or interaction with your product.
- **Make your persona different.** Add a unique detail to your persona to help focus your design team.



**ANYA.**

THE SINGLE, HARD WORKING COLLEGE COMMUTER

"Washing dishes and clothes is the bane of my existence, but I find Zen in the act of making coffee and whipping up something tasty with whatever I have in the fridge" (Noel)

MARITAL STATUS: Single OCCUPATION: Student AGE: 21

**FRUSTRATIONS.**

Struggles with time management  
Unable to find things in her apartment  
Is always short on cash  
Balancing work and school  
Short on kitchen items, ingredients  
Little to no relaxation time  
Overwhelmed

**GOALS.**

Manage budget better  
Be more organized  
Not have to work as many hours  
Awareness of schedule and commitments  
Locate things quickly  
Manage groceries better

**DAY IN THE LIFE.**

Anya wakes in the morning to her alarm clock, which has to be set each night. As an alternating driver in her carpool, the time varies when she has to get up and ready for classes. She has to wake earlier when driving, or can sleep in when picked up. The alarm can't take into consideration her class schedule or whether she's driving, so it's a mental load each day for her to remember and set it (Noel). Making coffee in the morning is a peaceful experience for her, mainly because it's one of the few things that doesn't ever move so she's not losing it. "There's no drama there" (Rich). Classes last throughout the morning and early afternoon, where she heads back to the apartment to catch a late lunch. With the cost of School, Anya is tight on cash and scrambles to find what's available in the fridge. She enjoys the challenge to creatively think of something to whip up with what's in the fridge, but sometimes she's missing one item and has to bolt to the supermarket to complete her meal (Noel). After eating Anya has to get ready for work but ends up running late. Things are always misplaced and lost, wasting time for her to get ready or mobilize quickly, and get out the door (Graham). After working into the evening, Anya's got to get home and study. Feeling overwhelmed on a daily basis, she hopes to be more organized with her budget, meal planning, and apartment, so her daily routines can be more efficient (Amy).

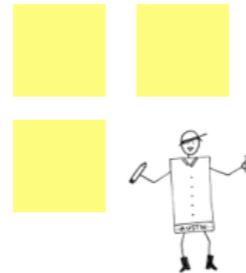
# Proto-Persona

**15 minutes** Take your synthesized research findings from the previous activity and to create a persona based on the findings.

**10 minutes** Bring your persona to life by writing a “Day in the life” for your Persona that reveals a special circumstance or challenging situation or condition – make your persona an outlier.

**5 minutes** Persona Introductions

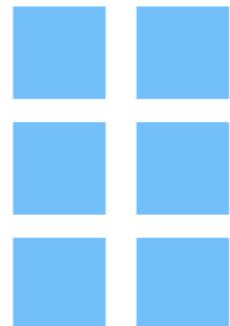
Bio



Habits & Tech



pain points



goals



# Q&A



# **Problem Statement**

# **BASED ON YOUR RESEARCH, YOU SHOULD NOW BE ABLE TO:**

- Redefine the hypothesized problem or opportunity
- Articulate your design direction

# IDENTIFY THE PROBLEM, NOT THE SOLUTION

- It's important to focus in on the problems, and decide which one you're going to solve.
- Experiences often address multiple goals, but ultimately you've got to ask yourself what a persona is actually trying to accomplish. What's their main need?
- We're still going to explore possible solutions to the problem... after we've agreed on what that problem is.

# LET'S TRY IT



# Google Drive:



## 04\_Student Resources

[https://drive.google.com/drive/folders/1zyAoc0J43ZuJXHTGrnLqkKwDeP4ZsfxS?  
usp=sharing](https://drive.google.com/drive/folders/1zyAoc0J43ZuJXHTGrnLqkKwDeP4ZsfxS?usp=sharing)

# Problem Statement

**5 minutes** Using your persona's name and tagline, write down a clear problem statement.

Write multiple statements. Edit and refine until it feels right -- or until you run out of time!

## PROBLEM STATEMENT & HYPOTHESIS

### PROBLEM STATEMENT

Define the problem that your users are facing.

\_\_\_\_\_ needs a way to  
persona

\_\_\_\_\_ because  
user's need

\_\_\_\_\_ .  
insight

### HYPOTHESIS

What can you do to address the problem?

We believe that by \_\_\_\_\_

\_\_\_\_\_ for  
doing something/creating a type of experience

\_\_\_\_\_ we will achieve  
these people/personas

\_\_\_\_\_ .  
this outcome

We will know this to be true when \_\_\_\_\_

\_\_\_\_\_ .  
we see this feedback/qualitative insight/quantitative measurement

PASTED CONTENT

# Hypothesis

**5 minutes** Write down at least 5 empathetic pitches, including:

- Name and tagline of your proto-persona.
- Highlight a specific need your photo-persona has based on your research.
- Reference an insight from your interviews and affinity map.

**3 minutes** Pick 1-2 that you think are most compelling.

## Example Problem Space: Alarm Clock & Morning Rituals

We believe Amy (working mother of a 6 month old) needs a better way to wake up and fall asleep multiple times at night because she wakes up exhausted and hates her alarm clock sound with a passion.

**PROBLEM STATEMENT & HYPOTHESIS**

<b>PROBLEM STATEMENT</b> Define the problem that your users are facing.	<b>HYPOTHESIS</b> What can you do to address the problem?
_____ persons needs a way to _____ user's need because _____ insight	We believe that by _____ for these people/personas we will achieve this outcome We will know this to be true when we see this feedback/qualitative insight/quantitative measurement

**PASTED CONTENT**

# **Experience Mapping**

# Experience Map

An experience map is a visual representation of a user's journey related to a product or service.

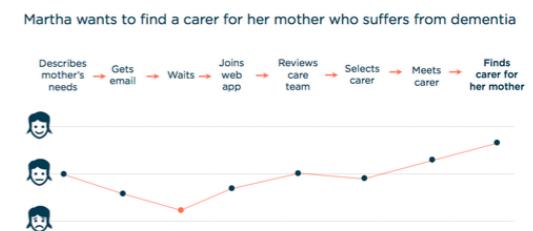
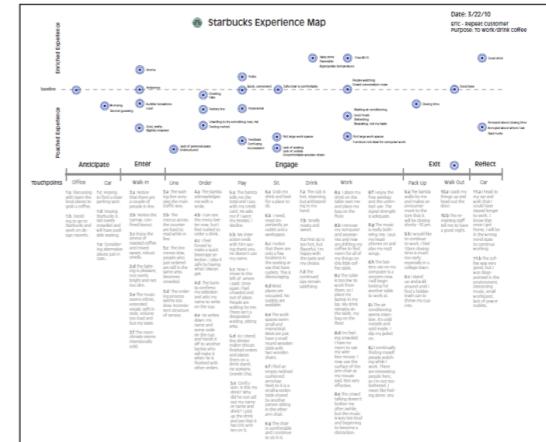
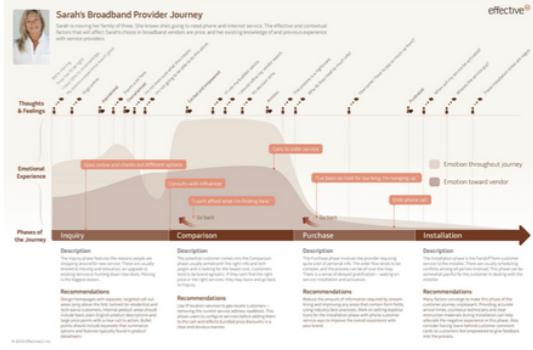
- Looks at the overall experience, not just inside the product or application.
- It charts user needs, wants, expectations from a user's point of view.
- Explores the overall experience for a particular scenario.
- Help us identify pain points and moments of delight.

**When to use:** Typically during the discovery/define phase of the project to map the existing experience.

# Experience Map

Experience Maps are a flexible artifact. The main goal is to help bring to life the context and pain points of your audience. Here are a few common components:

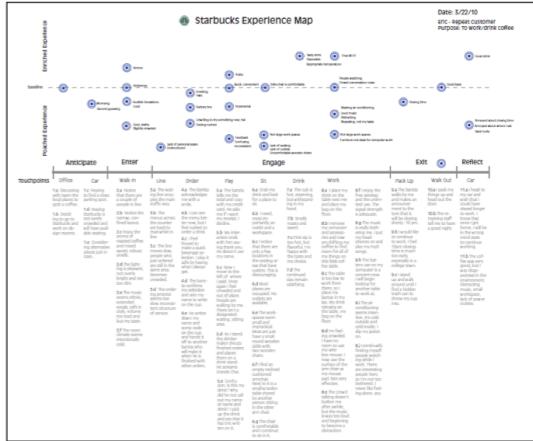
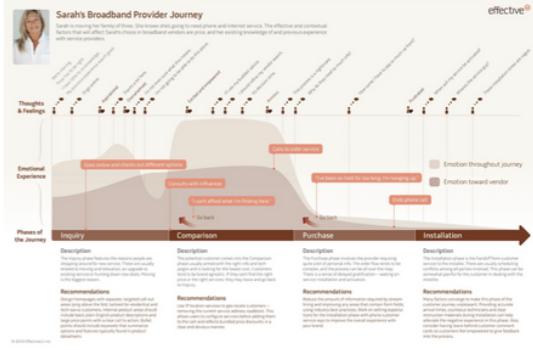
- An experience map can contain multiple parts, including:
- Main goal for primary persona (refer to problem statement)
- User Journey (main path / timeline for the map)
- Task Analysis
- Emotional and Mental State



# Experience Map

What is the "User Journey"

- Typically the core path of an experience map
- A journey map charts the main steps a user takes in a scenario
- May include key decisions
- The journey considers the user's action both inside and outside of an app or solution (offline and online)
- Is created from a specific user's point of view



Martha wants to find a carer for her mother who suffers from dementia

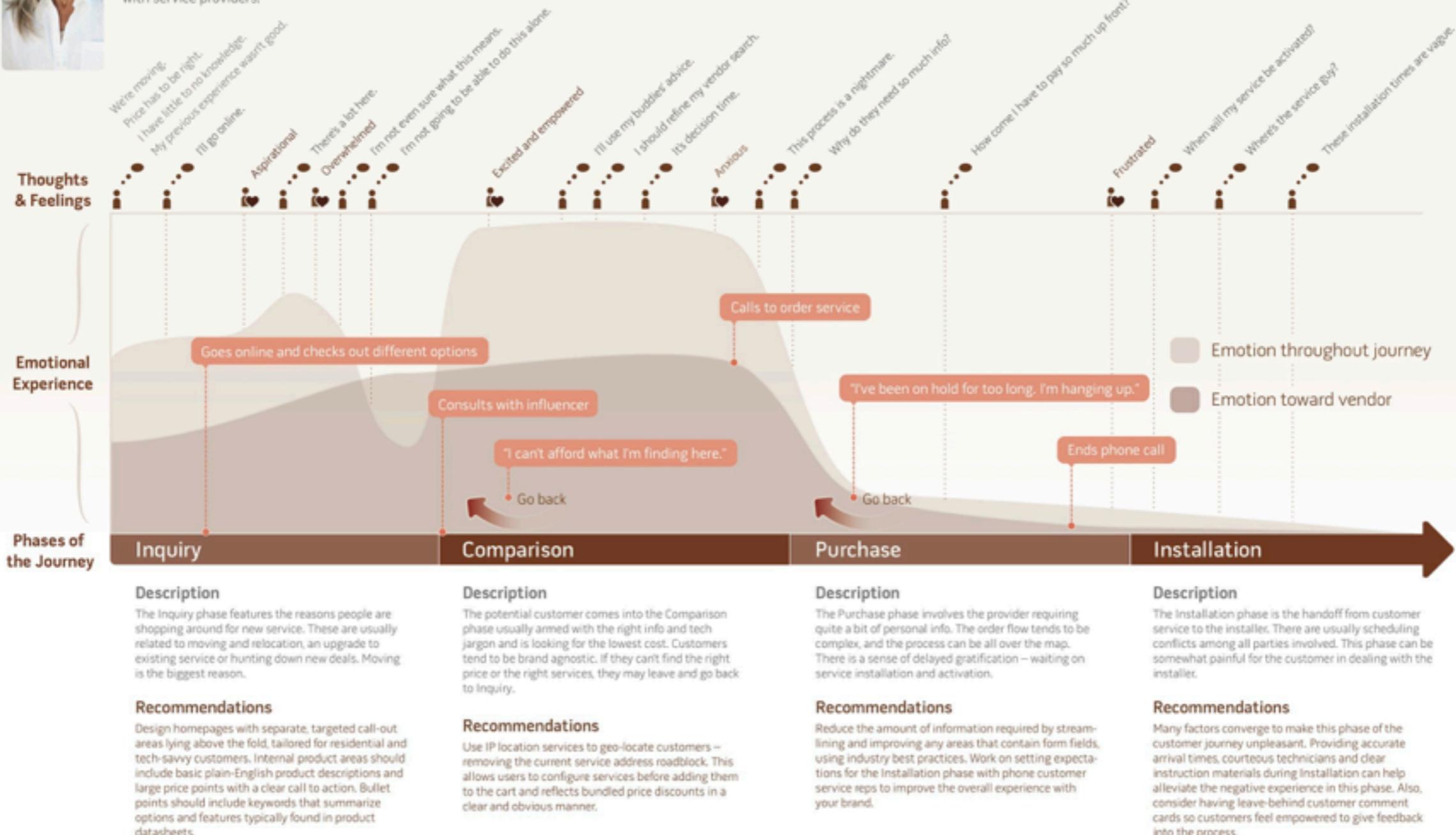




## Sarah's Broadband Provider Journey

effective<sup>®</sup>

Sarah is moving her family of three. She knows she's going to need phone and Internet service. The effective and contextual factors that will affect Sarah's choice in broadband vendors are price, and her existing knowledge of and previous experience with service providers.

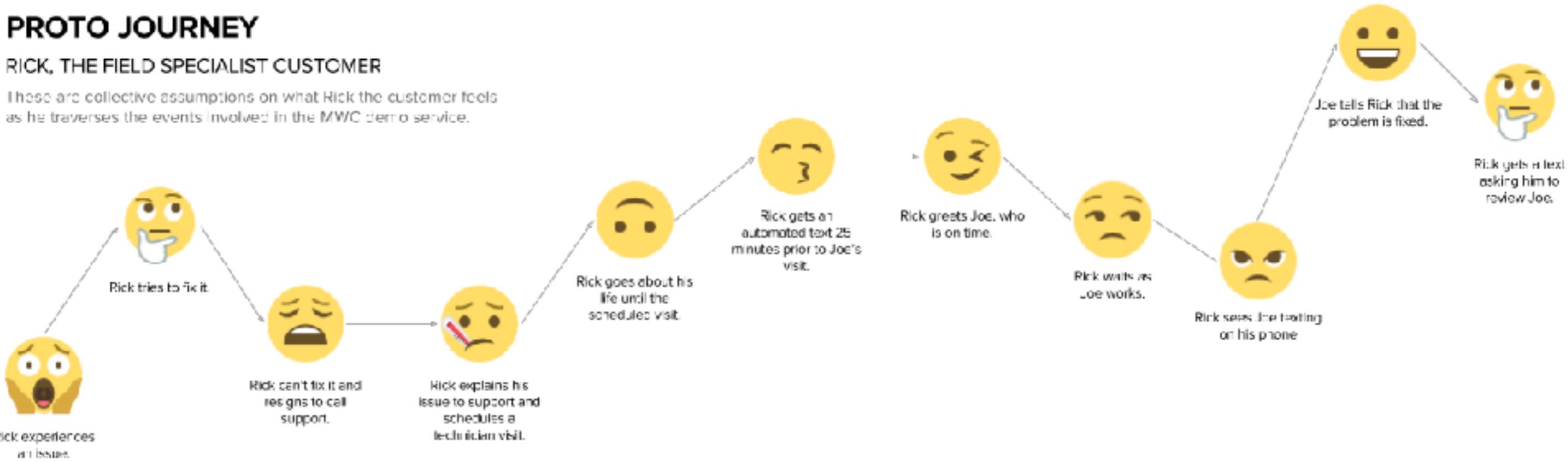


# PROTO JOURNEY

## RICK, THE FIELD SPECIALIST CUSTOMER

These are collective assumptions on what Rick the customer feels as he traverses the events involved in the MWC demo service.

delight



*Design challenge: how might we raise Rick's delight so that he advocates the service?*

**Anticipate Joe's issue**  
Could equipment send status updates so that the service can provide Rick with a health update of his system?

*buzz: Internet of Things*

**Provide helpful content**  
If Rick is a highly valued customer and a known DiYer, could the service provide him with helpful content to avoid a field trip?

*buzz: content partnership*

**Confirm Rick's request**  
After Rick calls, the service could send Rick a text confirming his request. This might make him feel assured his request is being processed and prime him to expect text from the service.

**Send Rick Joe's profile**  
Letting a stranger into your home is a sensitive subject. Share Joe's name, photo and other information to establish trust and let Rick know who to expect.

*buzz: "Wee Uber"*

**Provide helpful content**  
While Rick is living in an less than ideal state, could the service provide some tips for working around the issue while Rick waits?

*buzz: content partnership*

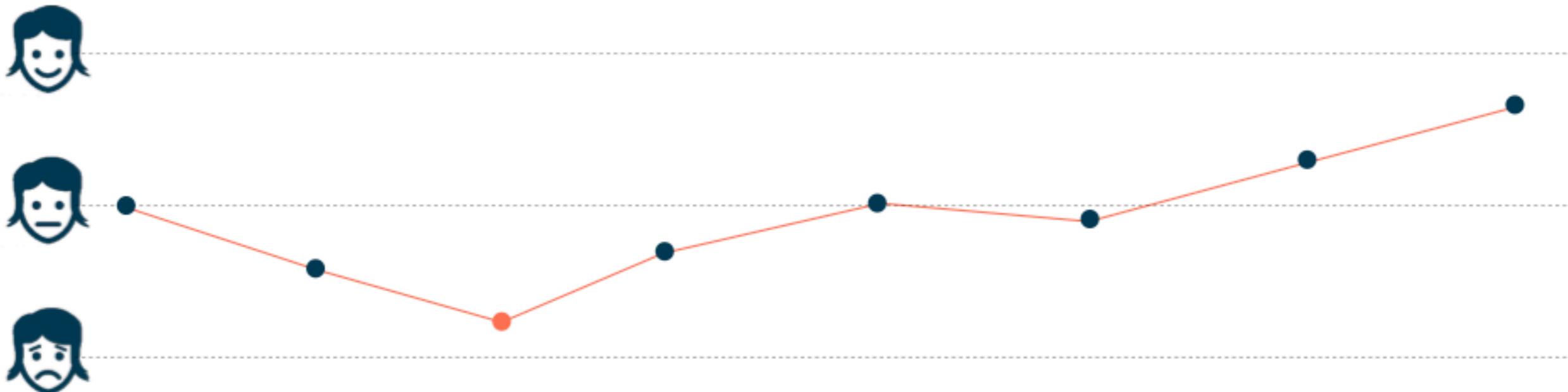
**Make sure Joe lets Rick know if he'll be late**  
Research suggests that if Joe expects to be late and lets Rick know, Rick will be happier than if Joe were actually on time.

**Make sure Rick understands Joe might use his phone**  
Rick might understandably be agitated if he sees Joe texting on his phone without any explanation that Joe is reaching out for help.

**Make the review clear and feel like it matters**  
This shouldn't feel like a burden for Rick. It should feel like the service is reaching out to genuinely value his feedback.

# Martha wants to find a carer for her mother who suffers from dementia

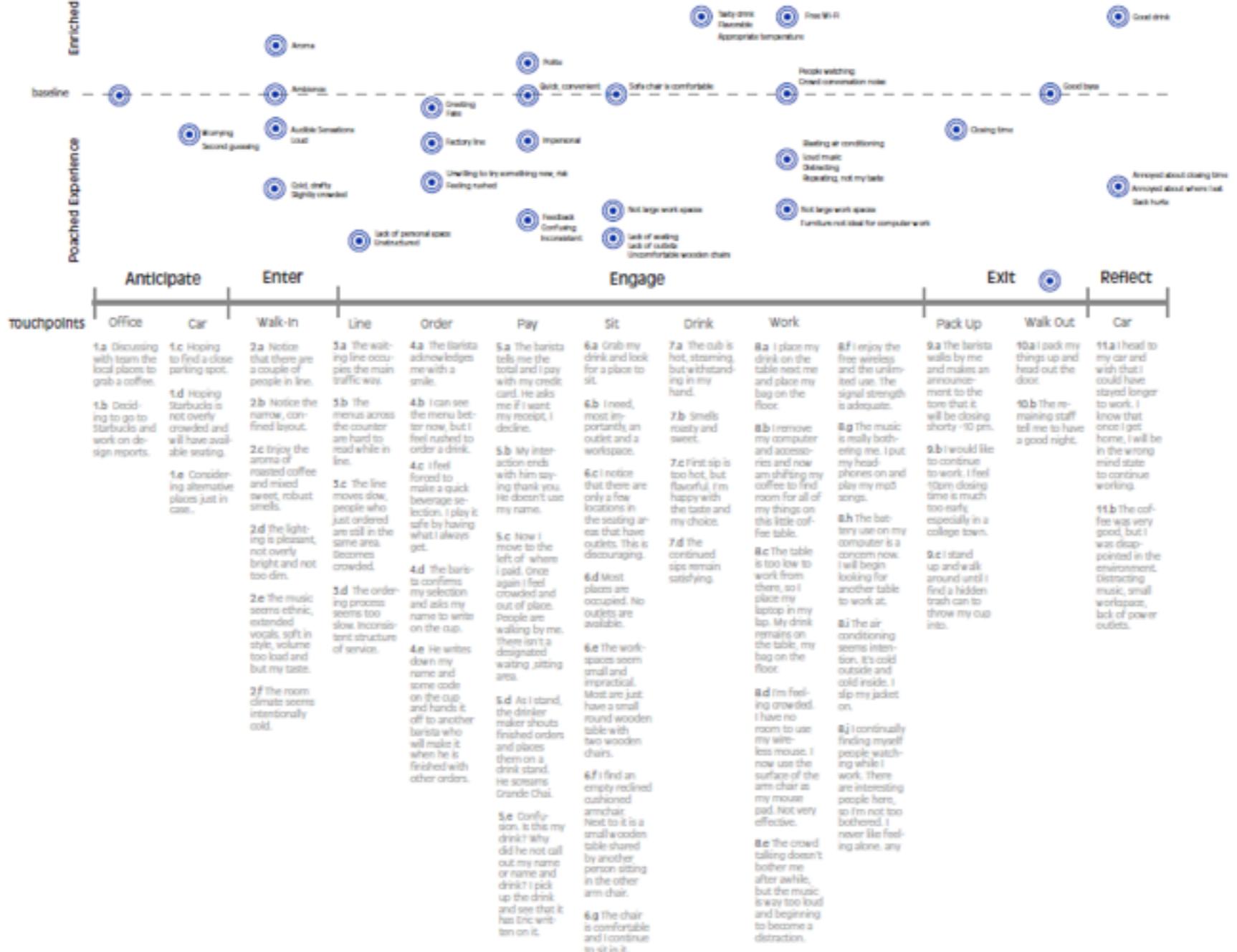
Describes mother's needs → Gets email → Waits → Joins web app → Reviews care team → Selects carer → Meets carer → Finds carer for her mother



# Starbucks Experience Map

Date: 3/22/10

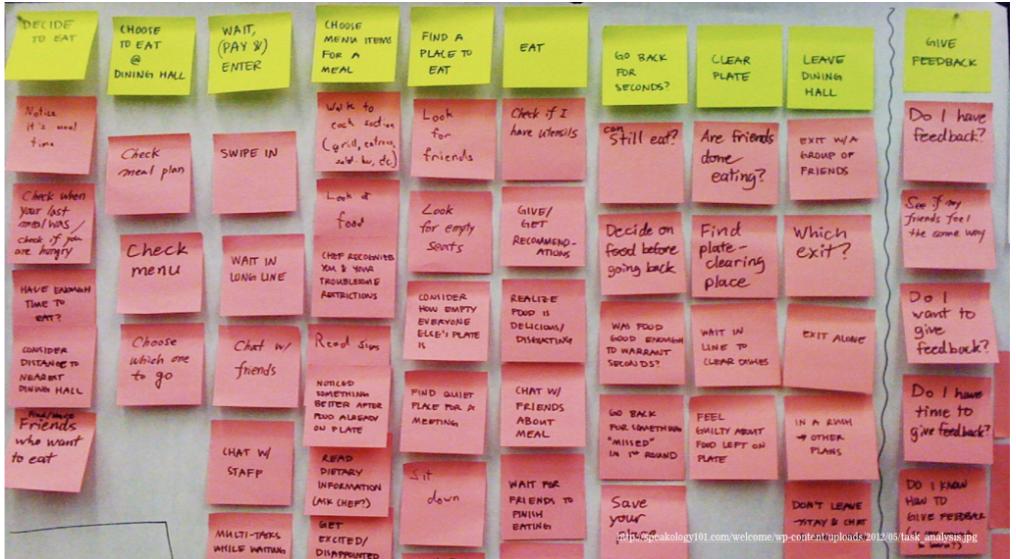
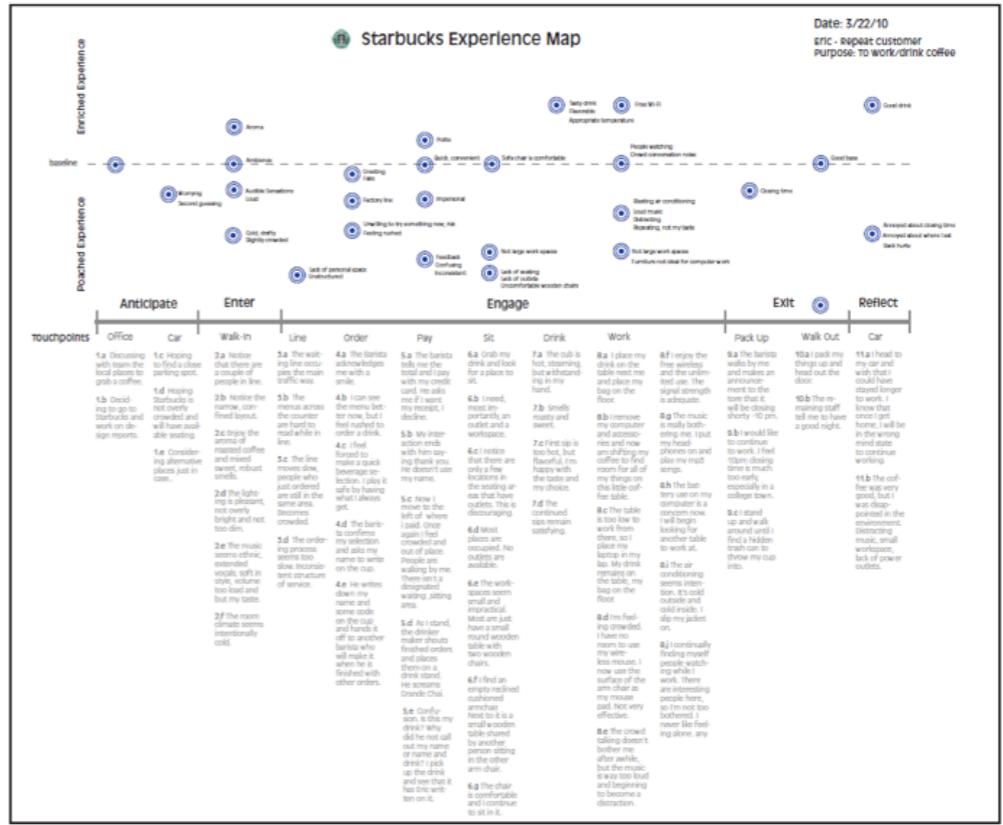
Eric - repeat customer  
Purpose: To work/drink coffee



# Experience Map

For complex scenarios, you can breakdown steps with a Task Analysis

- Based on the user journey
- Documenting all of the tasks a user completes along the journey for each step
- We can do this by walking through the necessary steps ourselves, by interviewing users, or by observing actual users in usability tests



# Experience Map

**Task Analysis:** Make a cup of tea

- Entry Point
- Individual steps that require one specific action
- Success Criteria



# LET'S TRY IT



# Map: Key Actions

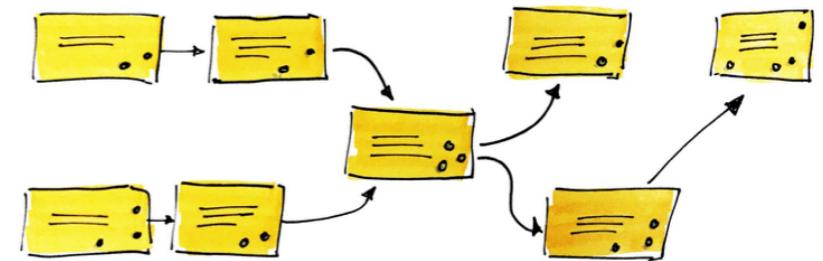
**10 minutes** List actors on the left. Put your primary persona at the top. In this case should be your interviewee/customer/personas. Write the ending/goal on the right, 'goal,' such as buying a product on the website.

**10 minutes** Write action verbs on boxes/postits and use arrows to outline the key steps. You should have over 5, but under 15 steps.

ACTORS    DISCOVERY LEARNING    USING    GOAL

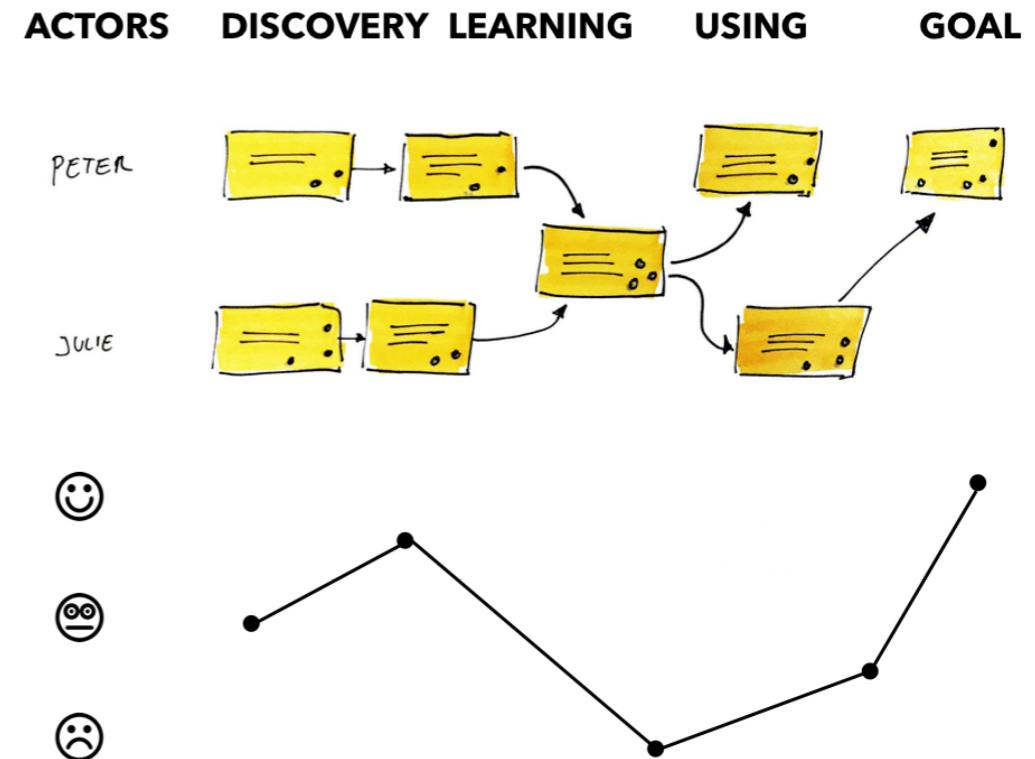
PETER

JULIE



# Map: Emotional State

**5 minutes** Map out your primary personas mental state at each phase. It's okay to make assumptions at this point, you can always test them later with your prototype.

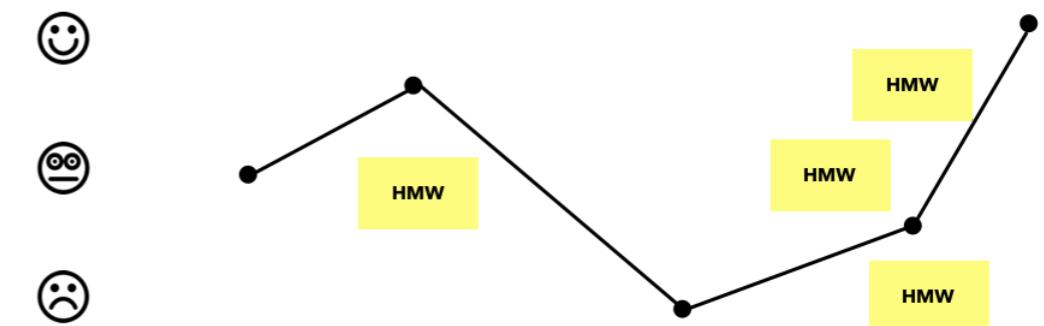


ACTORS   DISCOVERY LEARNING   USING   GOAL

# Map: Opportunities

**7 minutes** Write 3+ HMW questions and add them to your Map at specific stages (Discovery, Learning, Using, Goal)

**Bonus:** Write a task analysis to break down complex steps.



# Q&A



# **Workshop Time**

# Workshop Time Checklist

- **Document** your research
- **Affinity mapping**
- Flesh out your **persona(s)**
- Finish filling out the **Problem Statement worksheet**
  - Hand it in (physically or digitally) **by 5pm**
- Start your **experience mapping**