

Agile Procedure_215_Developing User Personas

Last Updated: 10/14/2016

Audience:
CWDS Service Teams

Frequency:
As needed

Introduction

Purpose of Procedure:

After reading this procedure, the audience will be able to understand how to develop user personas to assist in the development of user stories, conducting user research and ensuring that the scrum team stays in touch with their customer base by understanding who they are, what they do and why they do it.

Definition:

Personas are archetypes that bring to life a particular set of users in a useful and reliable way. They are a design tool that allows the team to break down customers into defined groups. Personas help to answer a simple question: *Who is the story for?*

A persona is a way to model, summarize and communicate research about people who have been observed or researched in some way. A persona is depicted as a specific person but is not a real individual; rather, it is synthesized from observations of many people.

Each persona represents a significant portion of people in the real world and *enables us to focus on a manageable and memorable cast of characters*, instead of focusing on thousands of individuals. Personas aid us to create different designs for different kinds of people and to design for a specific somebody, rather than a generic everybody.

Referring to a 'Carol Case Worker, a 'Tony Technical', or a 'Frank Foster Care Provider' persona gives us a very quick and precise viewpoint to consider. It's quicker than saying 'think about the user who is motivated by x, in context y...' and much more precise than just referring to a generic 'user'.

To be adopted, trusted and believed in - they must be evidence-based of course. Qualitative methods such as user interviews or usability testing sessions are typically used to gather in the raw data. Quantitative methods can also be used to validate and add weight to the observations identified. To be useful, they need to contain the right level of detail to support the anticipated design challenges ahead. Therefore it is good practice to make the associated research report as widely available as the Personas themselves (containing the supporting evidence for each persona).

Objective:

User Personas area developed for the following reason:

- Build empathy
- Develop focus
- Communicate and form consensus
- Make and defend decisions
- Measure effectiveness

When do we need to use Personas:

Personas are a useful tool for story development. Here are just a few examples of where you can put them to effective use.

1. Whenever you need to get closer to users

You'll need to read and re-read Personas in order to keep them in mind. So having them on the wall or in a handy portable format is absolutely key. Be wary of long periods in your project where there is no user research going on - this could be exactly the moment to remind everyone in the team about the personas - helping them to keep their empathy alive.

2. Whenever you need to align perceptions

Larger projects, like CWS-NS, involve large numbers of people - each with their own impact on the overall product or service and each with their own particular views. Personas are a great way to get everyone on the same page in order to aim for consistency across a range of digital services. It is important therefore to get into the routine of referring to them by name across the whole project team.

3. Whenever you're looking to bring focus to your product or service

Personas are a great tool to help with prioritization of functionality and features. The idea is to evaluate your backlog of requirements through the eyes of your personas. You'll need to ask which ones support the way each of your personas like to operate? Which ones are less important and could end up diluting their overall experience?

4. Whenever you're looking to identify new opportunities and stimulate ideas

The other side of evaluating your backlog against your Personas is that you can also spot areas where the Persona is not being adequately supported or encouraged in order to add new items to the backlog. As your designs evolve, they can continually provoke new ideas on how to better engage your specific users with content and / or functionality.

Persona Development

In order to develop user personas for your service, you often need to get inside the head of your users. Ask these questions:

- What do they think about?
- What do they see?
- What do they say?
- What do they do?
- What do they feel?
- What do they hear?

The details that are needed to build a persona are:

1. Role
2. Goal
3. Challenges
4. Personal Background

1. **Developing Personas - The Role:**

You may need to ask the following questions in order to develop the persona role:

- What is your job role/title?
- How is your job measured?
- What is a typical day?
- What skills did you acquire?
- What knowledge and tools do you use?
- What do you have with you at all times?
- Who do you report to? Who reports to you?
- Please tell me a little about your professional history.
- How long have you been doing what you do now?
- What did you do before this?
- How did it prepare you?
- What do you love about your job?
- What is most frustrating to you about it?
- If different, what is most frustrating to you about the information systems you use now to support you in your job?
- What do you take with you when you conduct investigations?

- How do you use CWS-CMS now?

2. Developing Personas - Goals:

You may need to ask the following questions in order to develop the persona goal:

- What are you responsible for?
- What does it mean to be successful in your role?

3. Developing Personas - Challenges:

You may need to ask the following questions in order to develop a list of the challenges your persona faces:

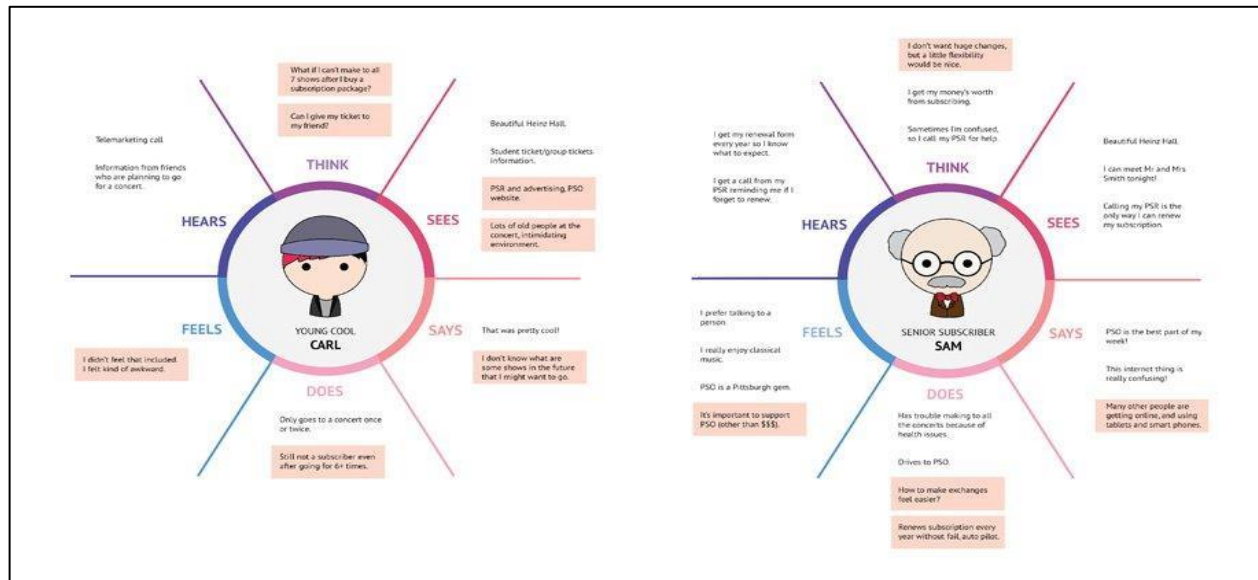
- What are your biggest challenges/impediments?
- How do you overcome these challenges/impediments?
- What would make these challenges/impediments lessen or disappear?




4. Developing Personas – Personal Background:

You may need to ask the following questions in order to develop the personal background of your persona:

- Age
- Family (single, married, children)
- Education
- Experience
- Hobbies
- Likes/Dislikes

Persona Procedure



 PICTURE & NAME	 DETAILS	 GOAL
<p>What does the persona look like? What is its name?</p> <p>Choose a picture and a name that are representative, and that allow you to develop sympathy for the persona.</p>	<p>What are the persona's relevant characteristics and behaviours?</p> <p>Consider demographics, job, lifestyle, spare time activities, attitudes, and common tasks, for instance.</p>	<p>Why would the persona want to buy or use the product?</p> <p>What problems should the product solve?</p> <p>What benefits does the persona want to achieve?</p> <p>If there are multiple problems or benefits, identify the main one and put it at the top.</p>

<http://www.romanpichler.com/>



Step-by-Step Process for Developing Personas:

Step	Description of Persona Task
1	Conduct Initial Brainstorm: Think of potential user personas for your service team

Step	Description of Persona Task
2	Conduct user research: Answer the following questions: Who are your users and why are they using the system? What behaviors, assumptions, and expectations color their view of the system? <ul style="list-style-type: none"> • What is their Role? • What are their Goals? • What are the Challenges they face? • What is their Personal Background?
3	Condense the research: Look for themes/characteristics that are specific, relevant, and universal to the system and its users.
4	Brainstorm: Organize elements into persona groups that represent your target users. Name or classify each group.
5	Refine: Combine and prioritize the rough personas. Separate them into primary, secondary, and, if necessary, complementary categories. You should have roughly 3-5 personas and their identified characteristics.
6	Make them realistic: Develop the appropriate descriptions of each personas background, motivations, and expectations. Do not include a lot of personal information. Be relevant and serious; humor is not appropriate.

Example of CALS Persona – RFA Social Worker:



Marc

RFA Social Worker

"I approach my caregivers with respect and with the understanding that caring for someone else's child is not for everyone. I really need to know Title 22 Regulation and any updates."

As a RFA Social Worker I have a B.A. in Psychology. My background was in Probations as a Correctional Officer where I worked 12 years. I then transferred to Children and Family Services as a S.W.II and did Intake and Case Carrier worker (ongoing services). After two years of that I came to Foster Care Licensing and I have been here about 16 years. My unit is currently transitioning from Foster Care Licensing to a Child-Centered Resource Family Approval Unit.

I currently utilize CMS to input information and visits I have with new applicants for approval and existing licensed foster families. Since 60% of my work is conducted in the licensee's /approval homes, I input data into CMS after every annuals, follow-ups, and inspection visits. For annuals I not only input the dates of the visit, but also the deficiencies/ problem areas observed. When corrections have been made, I input the data and how that deficiency was corrected. During Inspections I need to input various specifications of the home (population served, type of home – open or adoptive, capacity on license/approval, gender and age preference, ethnicity, language, religion, schools, pets, transportation, child care plan, etc.)

One pet peeve is the limited ability to communicate health and safety concerns, specifically with placement entities. Another pet peeve it to have not enough real estate in the application to document critical/necessary details/info effectively.

About Me

- 53 years
- Married
- Father of 2 grown men
- BA Psychology
- 29 years as County Employee

My Needs

- Safe/loving environment for children in need.
- Badge
- Business Cards
- Laptop and mobile printer
- Access to data system that can populate licensees information on different State/County forms.
- Approval history of applicants previous approval family and complaint history
- Cell phone with camera

What's in My Bag

- Camera phone for photos
- State and County Forms
- RFA Manual/Handbook
- Child's Personal Rights
- Documented Alternative Plan (DAP)
- Corrective Action Plan (CAP)
- Pens/Notepad



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