USING PERSONAS TO DEVELOP AWESOME ~~PRODUCTS~~ *experiences*

WE ARE

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These slides will be made available to you after the conference.

Create + Develop

Share + Understand

Work + Evolve

Create + Develop

What they are
Why they're useful
How to create them

PERSONAS

A persona is a representation of a type of customer.

Personas answer the question

"Who are we designing for?"

They help to align strategy and goals to specific user groups.

PERSONAS

What they are

- Accurate representations of users based on user research that incorporate user goals, roles, needs, and interests.

- They answer the following questions:
  - Who are our users and what are they trying to achieve? Why?
  - What behaviors, assumptions, and expectations do they have?

PERSONAS

What they are NOT

- A list of user tasks, duties, and responsibilities.
- Broad, generic, or vague archetypes.

How they're useful

They help you understand users' needs, pain points, motivations, and context of use.

INPUTS

Client-facing team
Trends
Analytics + Research
Customer Service/Help Desk
Users

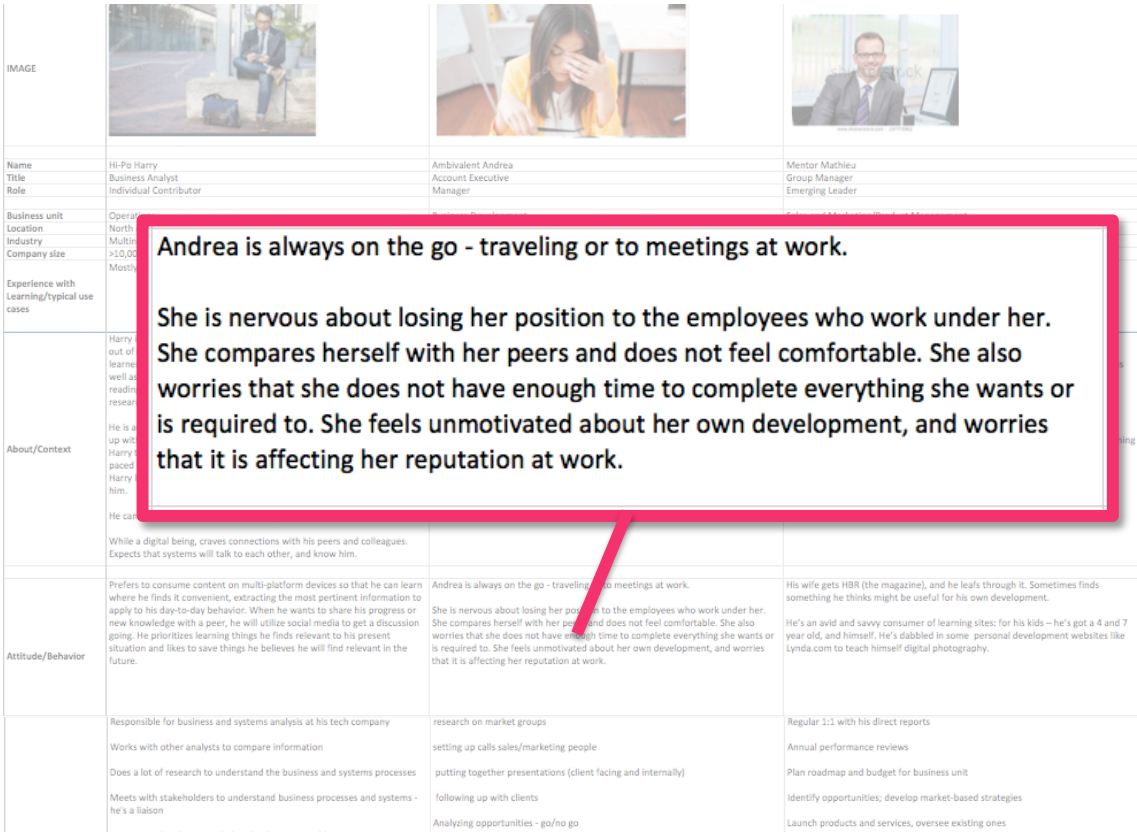
ORGANIZE

Demographics
Company info
Background story
Environment
Attitude/Behavior
Development needs
Daily tasks/needs
Challenges/frustrations

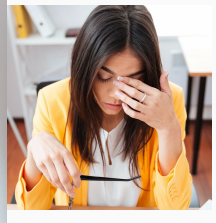
IMAGE			
Name	Hi-Po Harry	Ambivalent Andrea	Mentor Mathieu
Title	Business Analyst	Account Executive	Group Manager
Role	Individual Contributor	Manager	Emerging Leader
Business unit	Operations	Business Development	Sales and Marketing/Product Management
Location	North America - West Coast	North America	Europe
Industry	Multinational Technology	Pharmaceuticals	Consulting
Company size	>10,000	<2,500	<10,000
Experience with Learning/typical use cases	Mostly digital and online experiences with learning	Familiar with both online and blended learning	Has personal experience with online Learning, but hasn't been responsible for providing opportunities for his learners 'til now.
About/Context	Harry is a millennial. He's been working in his current job for 3 years, right out of college, and is actively looking to move up. He is a motivated learner, with big aspirations, and he completes work assigned to him as well as seek out resources to expedite his own development. He likes reading about people and topics he finds interesting and will do extensive research to learn all he can about it. He is an avid and savvy consumer of online material. Because he has grown up with technology, Harry wants his apps to feel intuitive and functional. Harry tries to do it all, so he needs products that complement his fast-paced life. He tackles problems head-on, using online resources to aid him. Harry leverages his connections to further connect to the world around him. He can be competitive, and seeks recognition for his accomplishments. While a digital being, craves connections with his peers and colleagues. Expects that systems will talk to each other, and know him.	Andrea is in her early 30s and works for a pharmaceutical company. Being at the company for several years now she has moved up to frontline manager, having four direct reports. Pharma is a tough industry - lots of competition and regulation. Her job requires her to travel a good amount. She's often tired and stressed. A lot rides on her ability to close business. She wants a way to learn without feeling guilty about what she does not already know. She needs to see inherent value in what she is doing. She has access to informal and more formal learning opportunities.	Oversees a department of 30, with 9 direct reports. He's a functional manager, pressed for time like everyone else. In addition to his regular responsibilities as a functional manager, more of the employee development is falling to him. He is to use tools to which his company provides access to support initiatives for his unit, and to support the development of his direct reports. He's familiar with the idea of cascading leadership (LAT), but has no formal training in it, nor does he expect to get any.
Attitude/Behavior	Prefers to consume content on multi-platform devices so that he can learn where he finds it convenient, extracting the most pertinent information to apply to his day-to-day behavior. When he wants to share his progress or new knowledge with a peer, he will utilize social media to get a discussion going. He prioritizes learning things he finds relevant to his present situation and likes to save things he believes he will find relevant in the future.	Andrea is always on the go - traveling or to meetings at work. She is nervous about losing her position to the employees who work under her. She compares herself with her peers and does not feel comfortable. She also worries that she does not have enough time to complete everything she wants or is required to. She feels unmotivated about her own development, and worries that it is affecting her reputation at work.	His wife gets HBR (the magazine), and he leafs through it. Sometimes finds something he thinks might be useful for his own development. He's an avid and savvy consumer of learning sites: for his kids – he's got a 4 and 7 year old, and himself. He's dabbled in some personal development websites like Lynda.com to teach himself digital photography.
	Responsible for business and systems analysis at his tech company Works with other analysts to compare information Does a lot of research to understand the business and systems processes Meets with stakeholders to understand business processes and systems - he's a liaison	research on market groups setting up calls sales/marketing people putting together presentations (client facing and internally) following up with clients Analyzing opportunities - go/no go	Regular 1:1 with his direct reports Annual performance reviews Plan roadmap and budget for business unit Identify opportunities; develop market-based strategies Launch products and services, oversee existing ones

ORGANIZE

Why is Andrea a challenge to design for?



CREATE + DEVELOP



Andrea
Account Executive
Frontline Manager

Not sold on idea of bettering herself because she gets by with just the right amount of effort. Her job is stressful enough without finding time for professional development.

Not motivated--she doesn't care, doesn't see the value, or hasn't had any great learning experiences yet.

PRODUCTS

HMM LE

PROGRAMS

NLP BLP LOL LD

Who is Ambivalent Andrea?

- Early 30s
- Stressed about closing deals
- 4 direct reports
- Anxious about how she's perceived
- Time pressed
- Travels a lot

Andrea's Expectations

- Irrelevant
- Time consuming
- Boring
- Hard to track
- Same old learning experience

Show Andrea

- Inherent value of learning
- What's required
- How she compares
- Worthwhile, fun, valuable experience
- Multiple paths to learning
- Tools to help her guide direct reports
- How to apply learning

Development Goals

LEADING YOURSELF

Know and Manage Yourself; Develop Personal Adaptibility; Understand + Respect Others; Cultivate Learning Agility; Demonstrate Integrity; Communicate Skillfully

LEADING OTHERS

Accelerate Talent Development; Acquire and Manage Talent; Leverage Networks; Build High Performing Teams; Inspire Engagement; Value Differences

LEADING THE BUSINESS

Manage Complexity; Act Strategically; Manage Global Business; Focus on Customers; Foster Innovation; Drive Execution; Build Functional Expertise

QA Considerations

- Lots of apps/devices, but not tech savvy
- Mix of laptop/mobile
- Pharma industry = security reqs
- <2,500 employees
- On the road constantly

"Ambivalent Andrea"

RULES OF THUMB

- Imagery should not be cheesy
- Ideally 3-5 personas maximum
- Validate personas
- Treat personas as living: update when presented with new data, information, or feedback

YOUR TURN

Take a minute to jot down a few details about someone you have in mind.

- A goal
- A pain point
- A behavior or attribute
- A name

YOUR TURN

Take a minute to jot down a few details about someone you have in mind.

A research associate who prefers electronic data over getting data out of print sources.

A 34-year-old alum who contacts Alumni Career Services in search of career guidance after a company downturn.

A faculty professor who needs to collect specific class material during a research trip.

An admin who uses the HR software to make updates to employee information.

A goal
A pain point
A behavior or attribute
A name

Share + Understand

Trading Cards

Journey Maps

TRADING CARDS

Andrea

FRONTLINE MANAGER

"I have a sales quota, no time and a lot of stress. I'm used to learning on the job. How is this experience going to help me?"

50

NEEDS AND IMPLICATIONS

- Needs time for her own development and resources to develop her direct reports
- Multiple paths to learning that is relevant and valuable to the here and now
- How to apply learning on the job
- How she compares to her peers
- Tools to guide direct reports

WHY IS AMBIVALENT ANDREA A CHALLENGE?

- Gets by with just the right amount of effort
- Has lots of apps and devices, but not particularly tech savvy
- Unimpressed with leadership development efforts by her organization up til now

Mathieu

GROUP MANAGER

"I want to get my direct reports information that will help them – and the team – move forward."

20

NEEDS AND IMPLICATIONS

- He is pressed for time; search should be quick and helpful
- He wants follow-up questions that he can use with team to see if the content is effective
- Values content in other languages, especially for more junior people in his department
- Wants to create reading lists for his team, but also for himself; wants to know what others are reading

WHY IS MENTOR MATHIEU A CHALLENGE?

- He's not experienced with leadership development; needs more guidance to find what his people need
- Wants to know his group is getting something out of the content

Harry

INDIVIDUAL CONTRIBUTOR

"I only want to see stuff I'm interested in and ways to share it with others. Give me information and ideas I can use right away."

30

NEEDS AND IMPLICATIONS

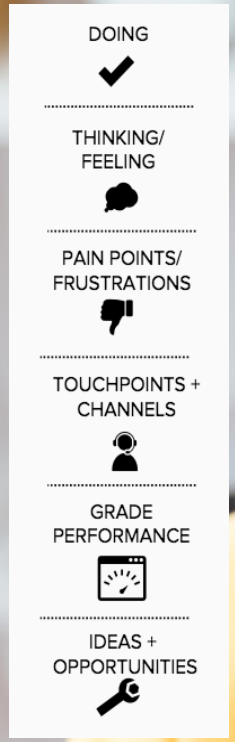
- Wants to know quickly whether it's worth reading or not
- Plans his time; how long do things take?
- Wants to remember the salient points, so he can use them in day-to-day work
- Share with colleagues and know what they are finding useful, too
- Save interesting stuff for later - online or off!
- Mobile Mobile Mobile

WHY IS HI-PO HARRY A CHALLENGE?

- Wants everyone to know he's reading Harvard content
- Wants his boss to know that he's using it on the job
- Eager, has high expectations for the content, the experience, and the application to his day-to-day work

SHARE + UNDERSTAND | CREATE + DEVELOP

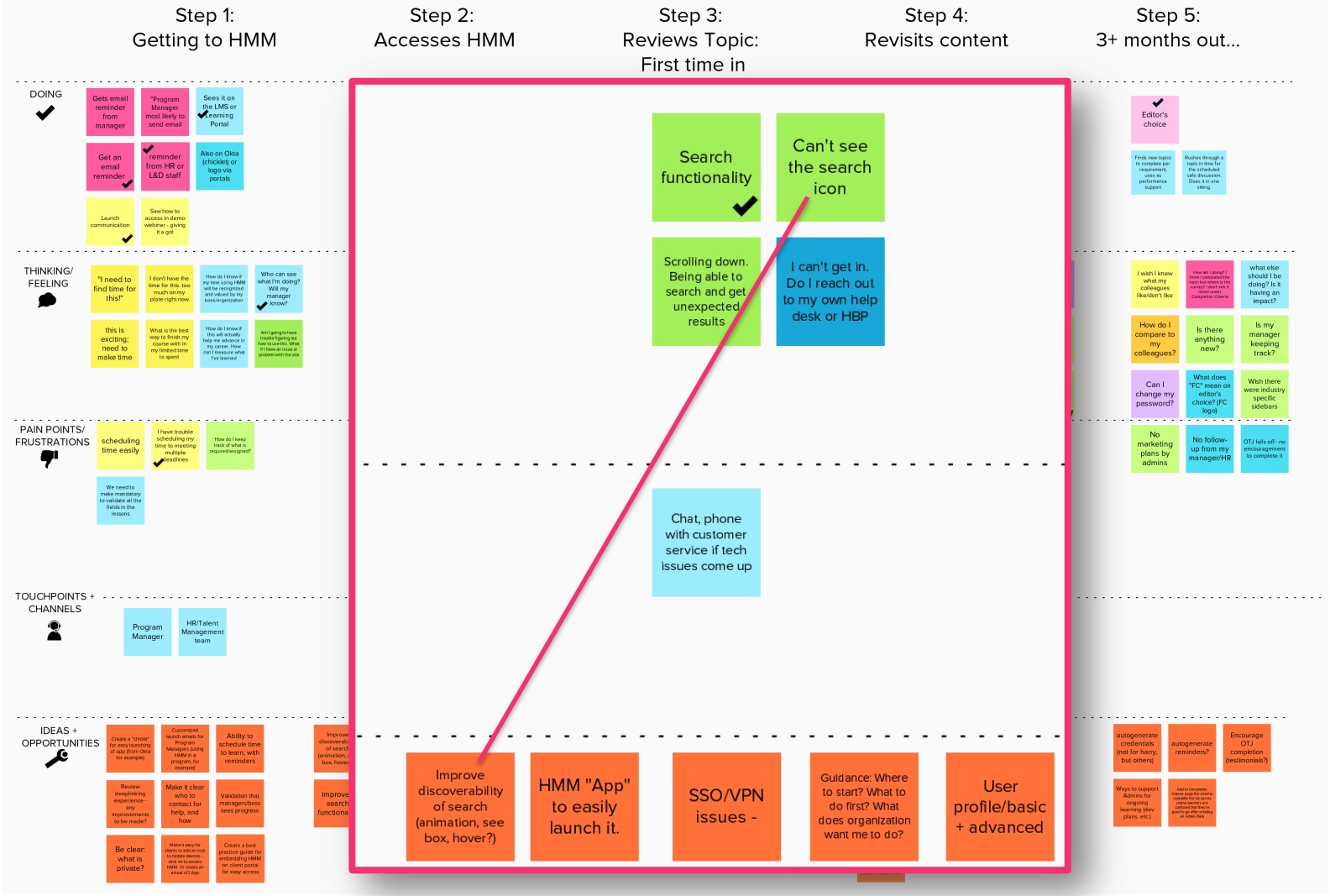
JOURNEY MAP



STEP 1 | STEP 2 | STEP 3 | STEP 4

CREATE + DEVELOP | SHARE + UNDERSTAND

Step 1: Getting to HMM	Step 2: Accesses HMM	Step 3: Reviews Topic: First time in	Step 4: Revisits content	Step 5: 3+ months out...



discover
RESEARCH
moment of need
LOGIN
CAROLE
MARY
HARRY
DOING
THINKING
FEELING
ENV
investigate
SEARCH
ACTIVE
PASSIVE
Browse/sort
ACQUIRE/COLLECT
APPLY/SHARE
use
READ/USE
REPORT

YOUR TURN

Take a minute to jot down a couple of steps in your persona's journey. What are they doing, thinking? What frustrates them?

Do you have any ideas or opportunities to make their experience better?

Work + Evolve

Scenarios

Prioritization Matrix

Agile Stories

Hypotheses

SCENARIO

SCENARIO

Andrea is tired. She travels a lot. The Pharma industry is pretty ruthless; she's got sales quotas to make, and four people to manage to help her get there. Her own development is not top of mind, and unfortunately it shows in her performance reviews. Recognizing this, her manager recommended that Andrea have access to HMM. There are regular communications from HR about suggested topics and readings, and links to tools that could be used on the job. While there's no requirement to complete topics, to get credit for completion, employees are expected to complete lessons and assessments. OTJ is available - not required - but strongly encouraged.

In addition, Andrea's direct reports are hankering for more responsibility as well. They're motivated and sharp. Andrea is a little nervous that they could move up the ladder more quickly, even though they have less experience than she does. Andrea will be expected to help guide their development as well. How will she manage that in addition to her own development? Will it even be worth it?

PRIORITIZE

Andrea
FRONTLINE MANAGER
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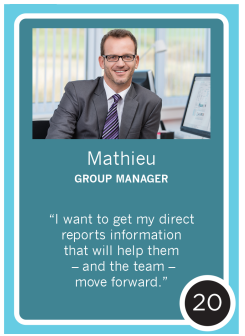
Mathieu
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"I want to get my direct reports information that will help them – and the team – move forward."
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PRIORITIZE

ITEM	VALUE	TOTAL
Video guide for "Develop Others"	-1: detrimental 0: neutral 1: nice-to-have 2: must-have	
Save your search		
Recommend/guidance upon login		
Read content while offline		

PRIORITIZE

ITEM	VALUE			TOTAL
Video guide for "Develop Others"	1	0	1	70
Save your search	0	1	1	50
Recommend/guidance upon login	2	2	1	180
Read content while offline	2	1	1	150

AGILE STORIES

Format:
As <a role>,

I want <experience/
feature>

So that <value>

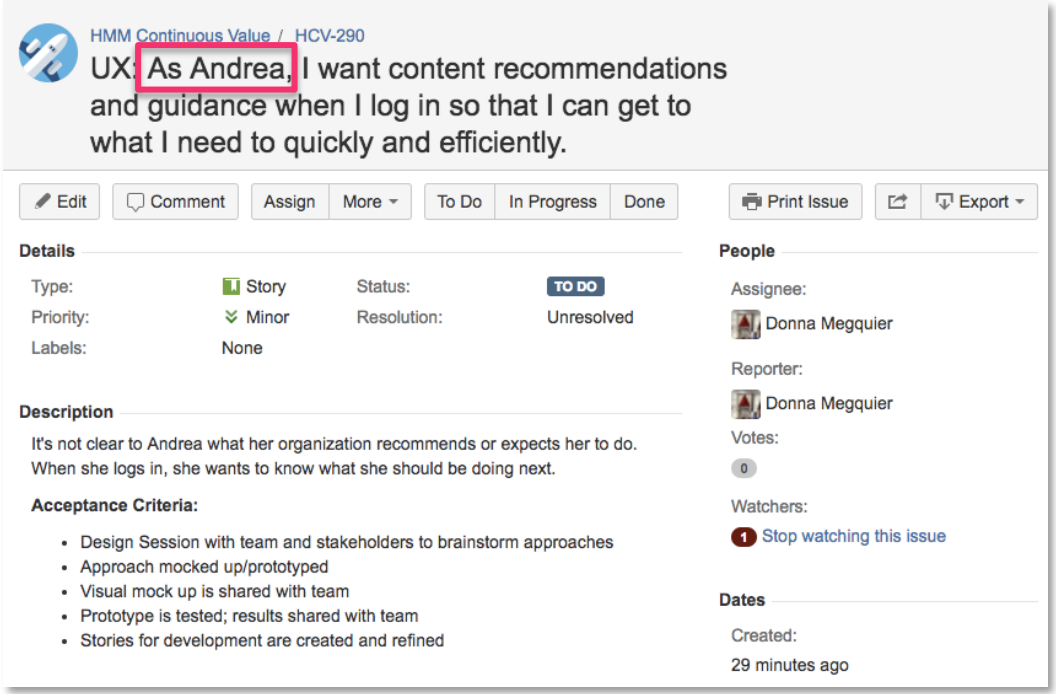
https://www.mountaingoatsoftware.com/agile/user-stories

AGILE STORIES

Format:
As <**persona name**>,

I want <experience/ feature>

So that <value>



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YOUR TURN

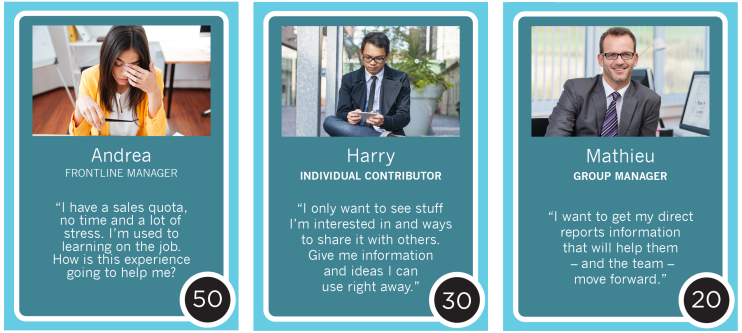
Take a minute to write an agile user story using your persona. Look back at one of the pain points from the journey map.

What could be done to address the frustration?

CREATE

MAP

PRIORITIZE



HYPOTHESIZE

We believe that [doing this / building this feature / creating this experience],

For [these people/personas],

Will achieve [this outcome],

We will know this to be true when we see [this feedback / quantitative measure / qualitative insight].

Questions?

Websites + Tools

Describing Personas (read)
https://medium.com/@indiyoung/describing-personas-af992e3fc527

Create UX Personas (video)
http://uxmastery.com/create-ux-personas/

A simple introduction to Lean UX (read)
https://www.interaction-design.org/literature/article/a-simple-introduction-to-lean-ux

Creating powerful personas (slides)
https://www.slideshare.net/blakepickering7/creating-powerful-personas

Hypotheses driven UX design (read)
https://medium.theuxblog.com/hypotheses-driven-ux-design-c75fbf3ce7cc

Anatomy of an experience map (read)
http://adaptivepath.org/ideas/the-anatomy-of-an-experience-map/

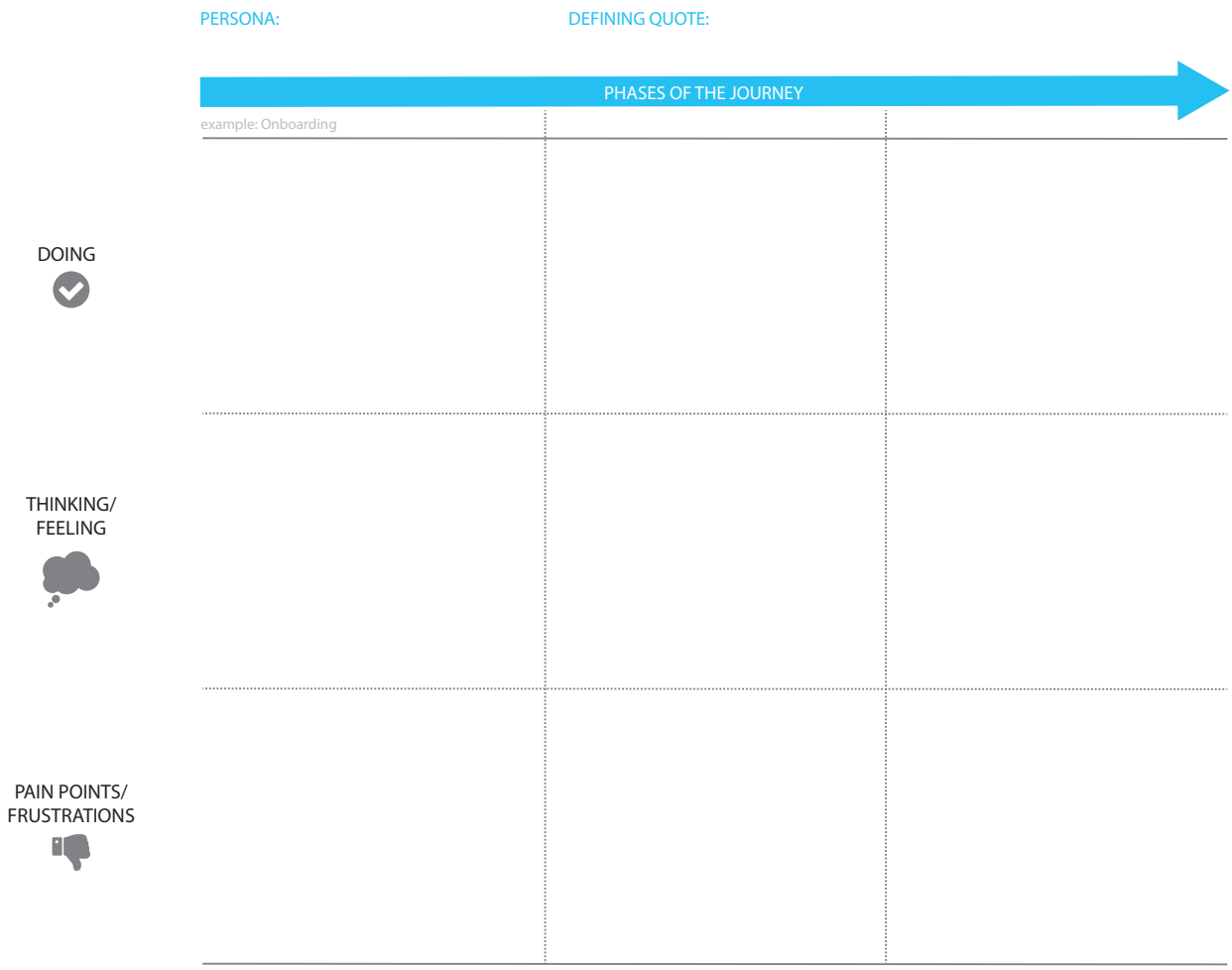
Mural online collaboration (app)
https://mural.co/

Try searching online for: UX personas, Lean UX, UX journey map, UX experience map, UX hypothesis

Using Personas to Develop Awesome Products
WORKSHEET

Persona Details (a goal, a pain point, an attribute or behavior, and a name)

User Journey Map (write down a few steps of your user's journey)



Agile Stories (As <persona name>, I want <experience/feature> so that <value>.)

(Example: “As Andrea, I want content recommendations and guidance when I log in so that I can get to what I need to quickly and efficiently.”)

Hypotheses (We believe that <doing this / building this feature / creating this experience> for <these people / personas> will achieve <this outcome>. We will know this to be true when we see <this feedback / quantitative measure / qualitative insight>.)

(Example: “We believe that by providing clear guidance and recommendations about content for Andrea, it will help her know quickly what she should do next. We will know this to be true when: 1) the number of completed topics is up 10% over the same period last year, 2) completions happen over a shorter period of time, and 3) learner satisfaction measured by in-product NPS has increased by 15%.”)

Questions? Would you like us to present to your team?

Maureen Barlow: *maureen.barlow@hbr.org*
Donna Megquier: *dmegquier@harvardbusiness.org*

Sample Learner Persona: Harvard Business Publishing, Corporate Learning

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HBS Baker Library UX Team

Here are four examples of user personas from HBS Baker Library from when interviews were conducted with the core audiences during the discovery phase for their new website.

Research Associate
"S prefers electronic data access to using Baker collections, and is actually resistant to the idea of getting data out of print sources. S is good at working the system, and before they know it, 3 or 4 different Baker staff members will be helping her with her project in parallel. Her "sit down with me for five minutes" will unquestionably expand to many hours of Baker staff time. She is sensitive about her lack of familiarity with business jargon, which she doesn't want her professor to see. She meets with her professor every week or so, but they email or speak practically every day, and she is very happy that her desk isn't near his in Morgan."

Faculty for over 10 years
"F is a prolific writer, and relies heavily on Baker Library for his research. He prefers Baker's experienced staff, who know him and his methods, to an inexperienced RA, who will only stay a few years. In addition, F's travel schedule is such that he doesn't have time to break in and manage a green RA. Because his affairs are so complicated he has an FA who is both skilled and hands on – she may pass requests directly to Research Services from F, or call Research Services or BISC when she has exhausted her own resources and is stumped by a request. F has the highest regard for Baker Library's collections, staff, and services, but will never learn to use the desktop tools the library has put on the home page, and is unlikely to visit the library in person. He has come to love email, because, unlike the phone, time zones don't matter. When possible, though, he still prefers the phone."

Alumni
"After a downturn at his current company, 34-year-old alum W has contacted Alumni Career Services in search of some career guidance. He is referred to Baker Library to investigate potential new employers. While at HBS, W utilized Baker a few times for help on field studies and to benchmark his salary before accepting his current position. He is frustrated about not being able to get into the same resources (databases, tools, information sources) that he had access to as an MBA student. He's never really understood that in terms of Baker Library his privileges have changed radically, and is surprised that his HBS MBA status doesn't carry over past graduation. As an HBS alum, W is always friendly to the library staff, but expects topnotch service from both HBS and Baker Library. He is very tech savvy, and wants to learn the most effective ways to do his job searching. He needs to feel that he is in control of the situation. Although he has tried to find resources himself on the library site, W feels both overwhelmed by the amount of information on the site, and very frustrated that when he finds something useful, he is blocked from many resources."

MBA Student
"C is not "library savvy" and has become used to assistants doing her leg work and getting her the information that she needs when she needs it – usually ASAP. C doesn't use the library on a regular basis for her first year of coursework, and she is not familiar with the library's services. As a matter of fact her professors discourage library use during the first year of the MBA program because they feel that research would hinder the case method teaching approach. However, C does use the library for job search research – she needs to locate and obtain a summer internship as part of the MBA program. When she does come to the library it is usually in the afternoon after class. She finds the copy machines and printers very convenient."

Got questions?
Contact Dimitri Siavelis at dsiavelis@hbs.edu