Making personas part of your team

Janice (Ginny) Redish

Redish & Associates

ginny@redish.net

www.redish.net

for
Whitney Quesenbery
Whitney Interactive Design

whitneyq@WQusability.com

www.WQusability.com

Goals for the workshop

- **Understanding personas**
  - What they are
  - Why they are useful

- **Developing personas**
  - Planning and gathering data for personas
  - Analyzing that data
  - Creating personas

- **Using personas**
  - Making the personas part of the team
  - Doing persona-based reviews
  - Designing from and for personas

2

Exercise: Sharing web stories

Think of a specific experience when you or someone you know used the web site of a city transportation system
− bus, subway, ferry, local train.

What was it for?
Why did you or the other person go to the web site?

What did you (or the other person) do?

Share the story with your neighbor.

3

Products, services, processes all require people

Without people, we would have no reason to create products, services, or processes.

Google

Faces and products from Flikr with attribution license
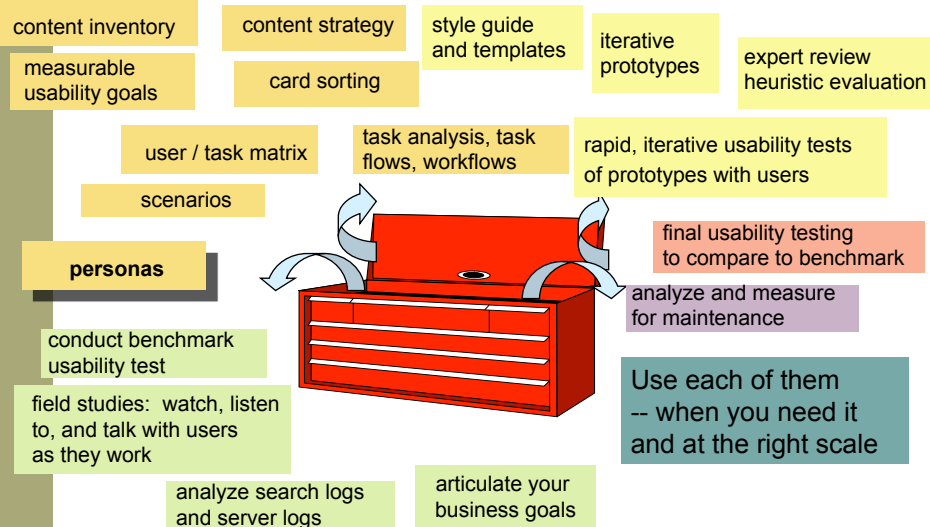Credits: Diet of Worms, Ernop, V J Fungo, Kai Hendry, Peiquianlong,

4

People need products, services, processes to be useful and usable

- A product, service, or process is usable if and only if

  the **people** who must (or should or want to) use it

  can use it to **achieve their goals, do their tasks**

  in **their own environments** and

  in the time and effort that **they think it is worth**.

- people = user analysis = personas
- goals, tasks = task analysis = scenarios, story boards
- environments = environment analysis = parts of personas, scenarios
- worth = value = measurable usability goals

5

Personas are one of many techniques in successful user-centered design

content inventory

content strategy

style guide and templates

iterative prototypes

expert review heuristic evaluation

measurable usability goals

card sorting

user / task matrix

task analysis, task flows, workflows

rapid, iterative usability tests of prototypes with users

scenarios

personas

final usability testing to compare to benchmark

analyze and measure for maintenance

conduct benchmark usability test

Use each of them -- when you need it and at the right scale

field studies: watch, listen to, and talk with users as they work

analyze search logs and server logs

articulate your business goals

6

What are personas?

Personas represent our users
- similarities
- differences

Personas show us that users are **individuals** with a specific age, history, needs, values, goals, and relationship to the product.

7

A portrait of a typical user

GEORGE
"Professional updater"
Enquirer

ABOUT GEORGE
- Senior Occupational Therapist working in a large NHS hospital
- Highest Education level: Diploma in Higher Education
- Age 44

PERSONAL GOALS
Seeking promotion; wants to find out 'how to be a manager'
Wants more 'professional recognition'

INFO SEEKING AND WEB HABITS
IT literate - uses the web at work and at home for "fact checking" and finding out about sport.

USABILITY NEEDS
Efficient - wants the right answer in a short space of time.

23 years ago, George completed his Diploma in Higher Education and qualified as an Occupa[...]
He is now a senior Occupational Ther[...] with 2 daughters - the eldest is no[...] year at university; the youngest is [...] home.

Most Occupational Therapists that G[...] with are qualified to degree level [...] couple of years, George has been ap[...] posts at a higher grade without suc[...] that his lack of a degree is lett[...] although he doesn't approve of OT [...] level profession. Both his and his w[...] modest (George is earning around £23[...]

Composite...
   ... Not one real person

Archetype
   ... Not stereotype
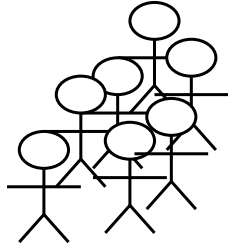
Specific
   ...Not average

8

UserFriendly 2008
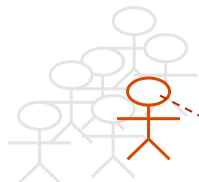© Janice (Ginny) Redish and Whitney Quesenbery

What do we know about our users?

- Ages 30-45
- Well educated
- 45% married with children
- Over half use the web 3-5 times a week
- 65% use search engines

But how would we use this information to make design decisions?

9

What if we made that information into a persona?

Elizabeth
- 35 years old, married to Joe
- has a 5 year-old son, Mike
- attended State College and manages her class alumni site
- Uses Google as her home page
- Last used the web to find the name of a local official

10

UserFriendly 2008
© Janice (Ginny) Redish and Whitney Quesenbery

Elizabeth

Goals:
Information I can use
Answers to specific questions

Typical Questions:
Tell me something new
I want the latest!
I need <this> information.

Top Usability Needs:
Efficient: Give me a search box and
I'll tell you exactly what I want

Effective: Give me accurate, reliable,
up-to-date information

Information Seeking Styles:
Find: Specific question or keyword

Query: What's new about….

Risks
Not interested in personalization or
community features

Already knows the basics

"I don't stay on a site long if nothing jumps out at me"

"Where do I type? Here? We have to change that!"

For Elizabeth, the web is a vast library. She likes to keep up with healthcare information, and uses the web to do it. Starting from Google, her favorite search engine, she finds a collection of pages that look good and tries them until she finds one that seems promising.

She doesn't like a lot of personal stuff on the web - testimonials, kids, interactive tools don't interest her a lot - but she does have definite ideas about how it should work

Needs:
• Targeted information at the right level of detail
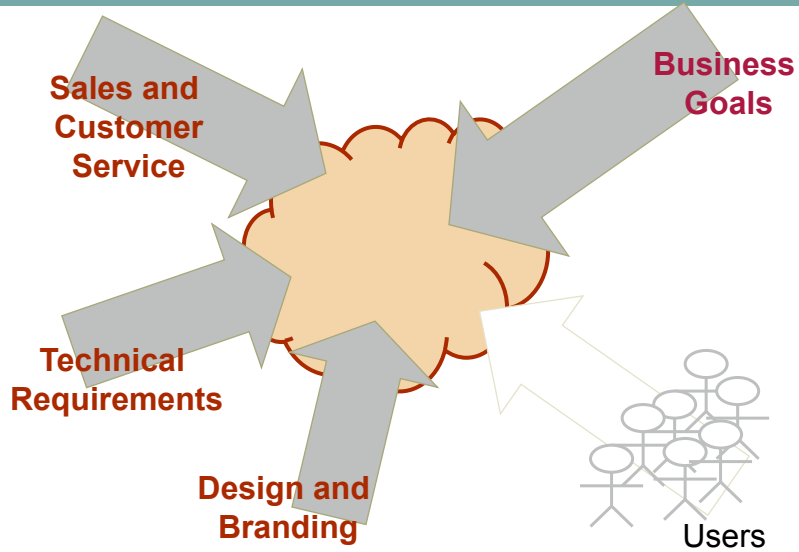• Search box or ways to reach information directly

---

Why are personas useful?

Personas
■ help us design for real users, not for ourselves

■ are a way to turn piles of notes from user research into a usable form

■ help us remember differences among users that matter for our product

■ give us a way of talking with others on our team

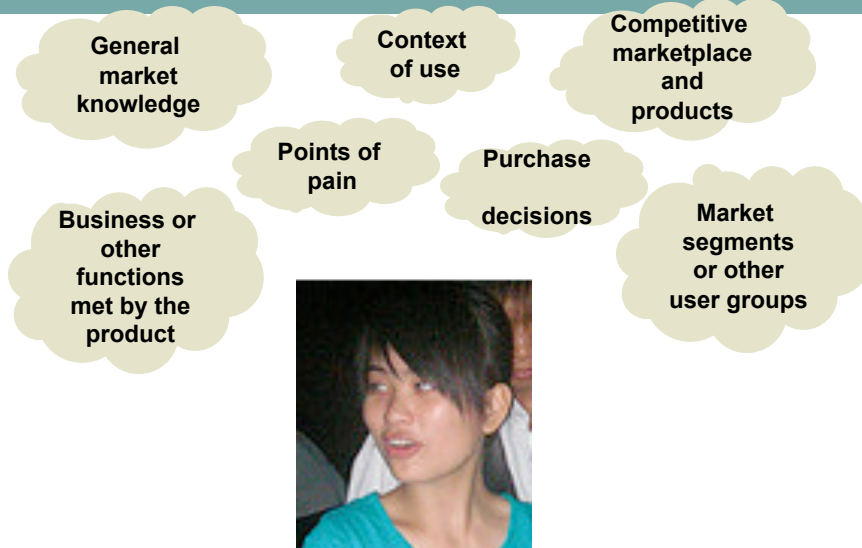■ make our assumptions about users explicit -- and help us design from data not assumptions

Challenge #1: Hearing users at all

Sales and Customer Service

Business Goals

Technical Requirements

Design and Branding

Users

13

Challenge #2: Organizing the data

General market knowledge

Context of use

Competitive marketplace and products

Points of pain

Purchase decisions

Business or other functions met by the product

Market segments or other user groups

14

Challenge #3: Seeing the individual

15
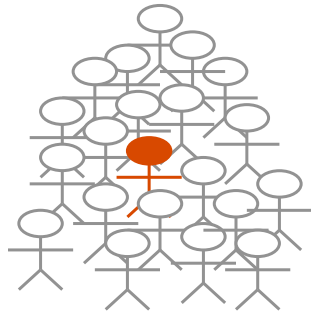
Challenge #4: Communicating clearly

Favorite quote:
"A designer knows he has achieved perfection not when there is nothing left to add, but when there is nothing left to take away." Saint-Exupery

Favorite design tool:
The whiteboard - or anything that lets me iterate the design quickly.

Member of:
SIGCHI, UPA and a local usability discussion group

16

UserFriendly 2008
© Janice (Ginny) Redish and Whitney Quesenbery
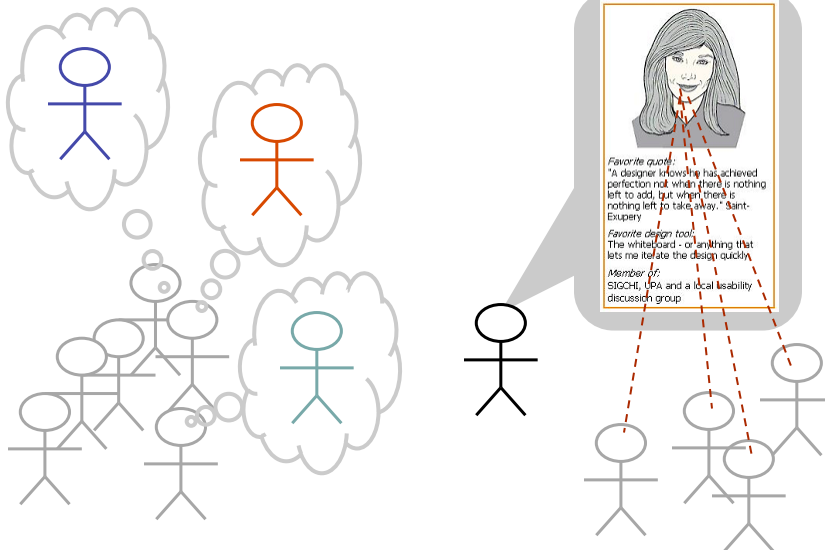
Challenge #5: Dealing with assumptions

50 kilo
frozen
food
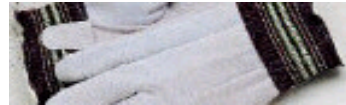
17

Goals for the workshop

- Understanding personas
  - What they are
  - Why they are useful

- Developing personas
  - Planning and gathering data for personas
  - Analyzing that data
  - Creating personas

- Using personas
  - Making the personas part of the team
  - Doing persona-based reviews
  - Designing from and for personas

18

Developing personas

Planning and gathering data

Analyzing the data

Creating the personas

Using the personas

19

Planning and gathering data for personas

20
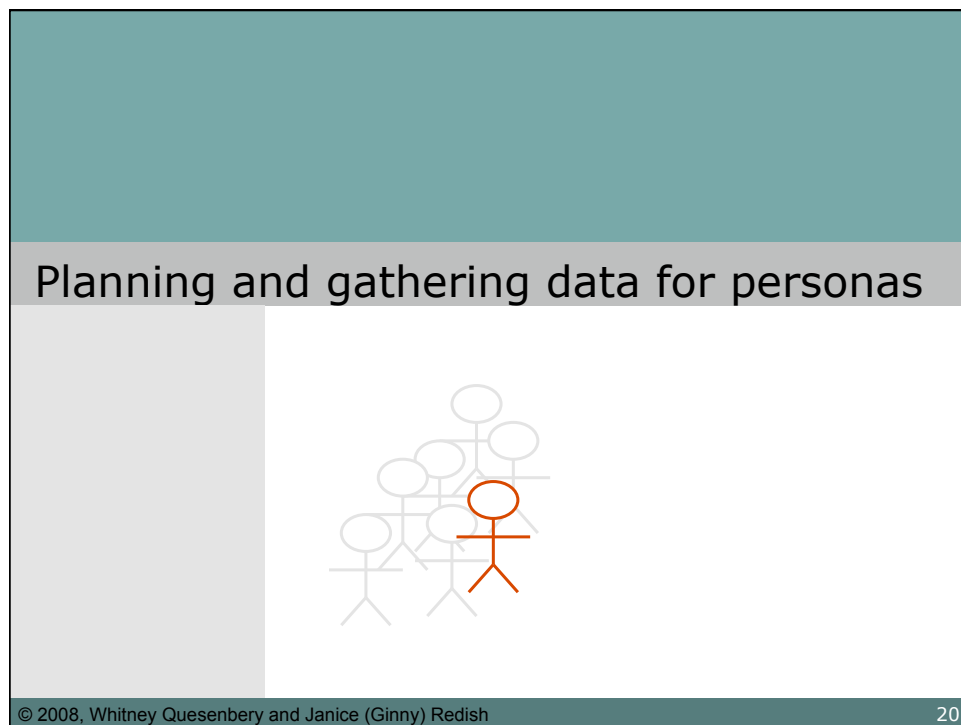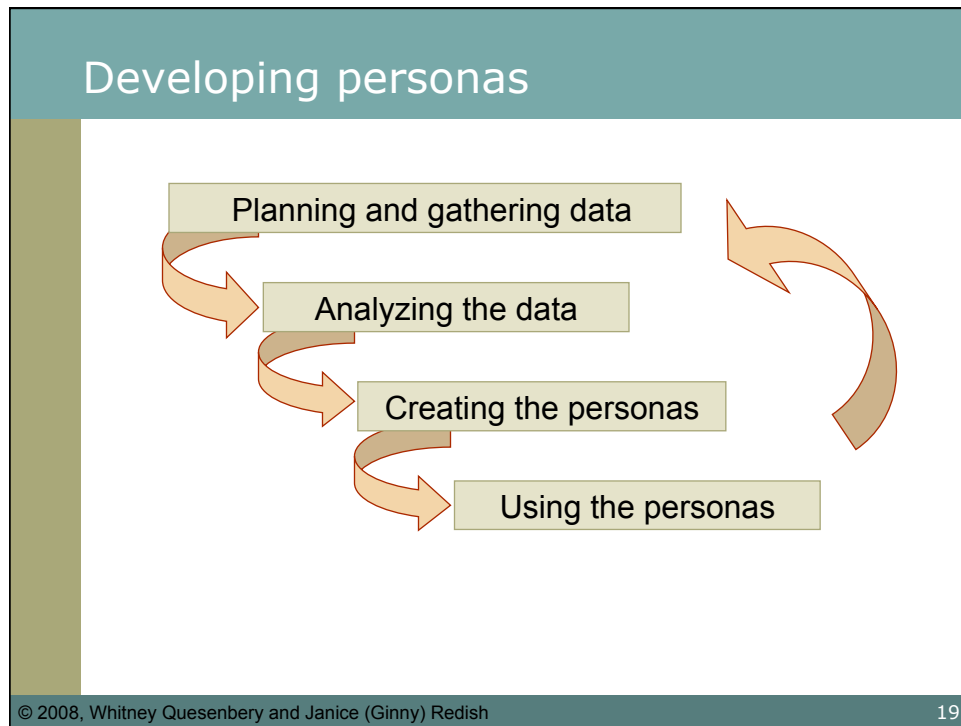
Planning personas research

- ■ Understand the scope
  - ■ Are you working within one large segment, or looking across different types of users?
- ■ Identify and narrow target users for research
  - ■ Market segments
  - ■ User groups or target users
- ■ Decide on a focus
  - ■ Which groups are important to the business?
  - ■ Or are not well served by the current product?
  - ■ Or have unique characteristics?
- ■ Eliminate peripheral or infrequent users
  - ■ Don't build your product around exceptions

21

Personas are not market segments

PERSONAS	MARKET SEGMENTS
■ Built on different types and styles of interaction	■ Built on different buying behaviors
■ Focus on defining user's goals and how to meet them	■ Focus on how the business can reach and attract them
■ Primarily based on qualitative research	■ Relative quantitative size of segments is important
■ Rich understanding of people	■ Usually based on quantitative data (surveys)

22

Learning from users

- User interviews or participatory sessions
  - One-on-one sessions to walk through their tasks, jobs, and daily routines
- Direct observation
  - Site visits, contextual inquiry and other observation techniques to learn first-hand how people go about their work
- Indirect observation
  - Watching training classes, listening in on customer support lines
- Gathering stories through interviews
  - Using the critical incident interview technique

Other Sources of Information

Sales

Training

Customer Service

Field Service

Call Centers

Published Research

Industry Magazines

Subject Experts

© 2008, Whitney Quesenbery and Janice (Ginny) Redish   23

What do we want to learn?

- Personal characteristics
  - Demographic details
  - Personal characteristics
  - Job or domain knowledge
  - Computer and web skills

- Goals and tasks
  - Activities
  - Tasks

- Motivations
  - Influencers or advisors
  - Decision factors
  - Barriers
  - Expectations

- Attitudes and needs
  - Information needs
  - Tactile and visual
  - Trust and assurance

© 2008, Whitney Quesenbery and Janice (Ginny) Redish   24

Stories reveal personas

- Stories provide rich information in an indirect format
  - What do they tell stories about?
  - Who is in their stories?
  - What situations do they describe

- Real quotations help you hear their voices
  - What words do they use?
  - How do they talk about the task or product?

25

Our project

We are planning a web site that will help people use the metro area public transport system

They will need to be able to plan their trips, find the fastest or easiest routes and...

Gathering data

We have interviewed and observed many people who use the transit system... but let's gather a little more.

26

Analyzing the data we gathered

The web saves me time

Visits a lot of different sites

Uses e-commerce

Navigates easily

27

Organize the information

1. About this person
- Demographic information
- Relationship to company
- Level of domain knowledge
- Level of computer use

2. Goals and tasks
- Activities
- Task approach
- Timing, order and triggers for activities

3. Motivations
- Influencers
- Decision factors
- Barriers
- Expectations
- Social pressures

4. Attitudes and Needs
- Styles and terminology
- Trust or assurance needs
- Information needs

5. Other observations
- Great quotes
- Environment or other contextual information
- Any other data points or observations

28

Look for patterns in the data

- **Look for personal similarities in:**
  - Interaction styles
  - People with similar characteristics
  - Patterns in task approach or goals

Web saves time

Visits a lot of different sites

Uses e-commerce

navigates easily

- **Look for task similarities**
  - By function: Job titles or tasks
  - By usage patterns:
    Frequency and variability of use
  - By level of experience: Domain or computer knowledge and comfort

Mistrustful of info online

Leaves a site quickly

No-nonsense. Doesn't like cute

- **Look for shared stories**
  - Stories reveal attitudes and emotional factors

Very deliberate approach to web

Uses search

Likes to print long pages to read and save

Takes notes as she works

29

Identify clusters around key variables

- **Look for variables that identify differences**
  - Put people and variables on a matrix
  - Look for clusters of people
  - Do this with different variables until patterns emerge

- **Clusters of people represent possible personas**
  - How are these people alike?
  - How are they different?
  - Do they have a defining characteristic?

11

P8 P9 P2 P7 P5

P3

12 P1 10 P6 13 P4
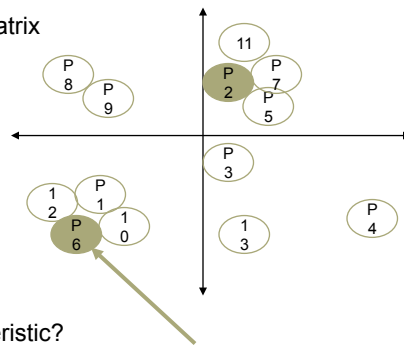
In each cluster, one person will often be the inspiration for the persona.

30

UserFriendly 2008
© Janice (Ginny) Redish and Whitney Quesenbery

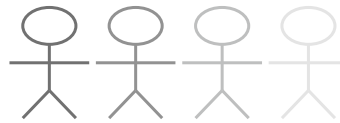## Organizing your personas
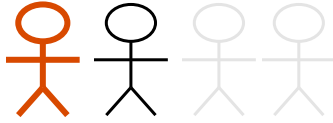
Strong <u>primary</u> and <u>secondary</u> personas, often based on tasks
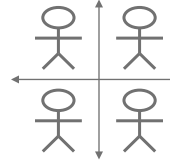
A <u>matrix</u>, based on two variables
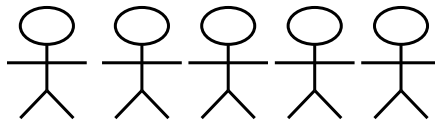
A <u>collection</u> of personas, with different key characteristics, or

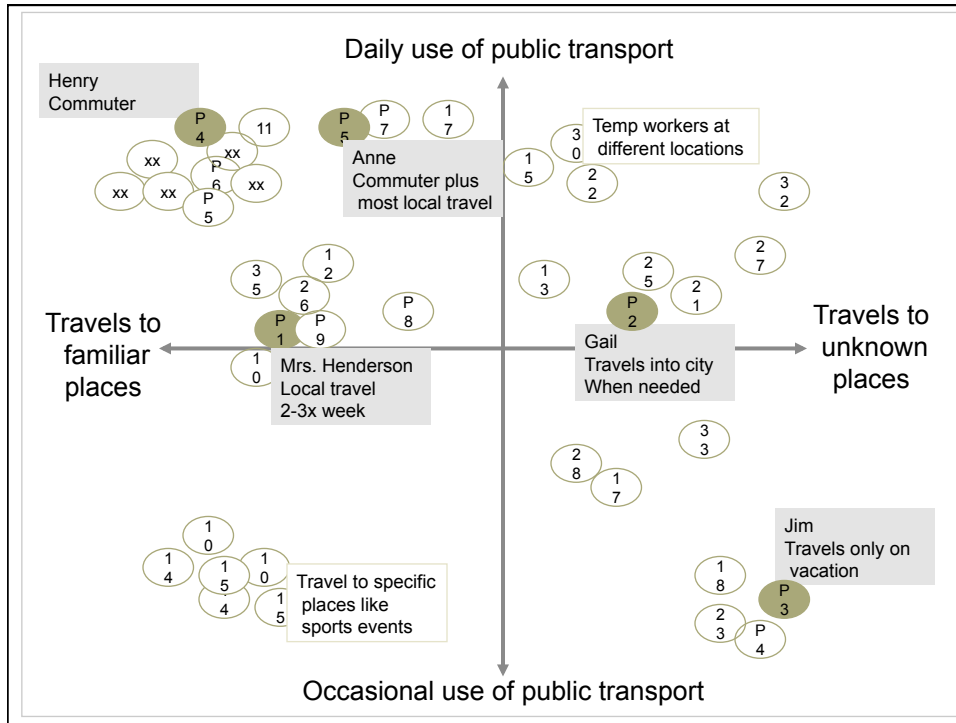A <u>spectrum</u>, based on 1-2 strongly related characteristics

31

Our project

Analyzing the data:

What are the patterns in the information we have gathered about people riding our public transit system?

32

UserFriendly 2008
© Janice (Ginny) Redish and Whitney Quesenbery

Making Personas Part of Your Team

Daily use of public transport

Henry
Commuter

Travels to familiar places

Anne
Commuter plus most local travel

Temp workers at different locations

Travels to unknown places

Mrs. Henderson
Local travel
2-3x week

Gail
Travels into city
When needed

Travel to specific places like sports events

Jim
Travels only on vacation

Occasional use of public transport

Creating the personas

UserFriendly 2008
© Janice (Ginny) Redish and Whitney Quesenbery

Making Personas Part of Your Team

Make the personas real for team members

Personas might include
- personal characteristics: job, age, education, other details
- goals and motivation
- attitudes, need for trust and assurance
- great quotes from the personas
- information needs
- background: the persona's story
- scenarios: stories of why and how they would use the product

35

Choose details that...

- Make sense in the context of the project:
    - Reflect part of the environment or context of use
    - Suggest how the persona might make an important decision
    - Create a personal history
- Help differentiate the personas:
    - Expand on the differences between them
    - Suggest different design choices
- Connect to usability issues:
    - Usability needs
    - Learning styles
- Let the team get to know the personas:
    - Reveal personal choices, lifestyle, or activities
    - Have a little bit of fun

36

Use photos to give the persona "life"

- **Start with the persona**
  - The picture must "feel" right to the whole team

- **Use other photos to show the persona's life**
  - the persona in context
  - members of their family
  - house, office, or other locations
  - relevant details: pets, car, friends, favorite magazine, favorite places, technology

Husband, Jason

Son, Marcus

At the office

37

Rachel: ready for change

"Clubbing is so 2000. It's time to start my life"

Enthusiastic dreamer - scattered - uses offline contacts – texting, not email

Personal Details
- Age 25
- Lives in North London with partner
- Supervisor (retail)
- Highest education level: GCSE

Personal Goals
Wants promotion but has hit a ceiling with current qualifications
Fulfill her potential

Using the Web
No access at work
Looks up clubs, travel
Regular on eBay
iPod user

Usability Needs
Engaging - she needs to be reassured and entranced by the prospect of study.
Easy-to-learn - she will give up if it's too hard

Market Segments
I'll get a degree someday
Traditional Part Time
Highly motivated by self progression
Lower socio-economic
Considering local FE/HE college

When We Meet Rachel
Rachel left school at 16 with a GCSE then took a series of jobs in retail before moving to another area when she met and moved in with her current partner.

She still likes going out to clubs and parties, and is always one of the first to try a new place to eat in her town.

She's an energetic person, always throwing herself into new ideas, and schemes for new jobs, fun vacations and so on. For a few months, she wanted to go into adventure tourism, and even signed up for an informational course. But too often, she finds her plans slipping away. She would also like to have children and doesn't want to leave it too late.

She works for a major retail chain as a supervisor and would like to climb the career ladder further but her qualifications are holding her back from making the leap to be a store manager. In her more practical moods, she knows that she could do it, if she just had a chance to prove herself.

First Contact with the OU: OU on TV
Insomnia led Rachel to the OU, watching programs on the telly. She starts to enjoy the programmes and thinks about doing something to improve her career. It takes her a long time to act on this idea, but she visits an Open Day.

She spends a long time thinking about it, sometimes browsing the web site, but also reading the brochures she has taken from the Open Day.

On her third trip to an Open Day, she finally registers for an Openings course that's about to begin.

What Does Rachel Want to Know?
What level should I start with?

Can I study as a one-off? Can I count courses towards a degree later?

How can I choose between business studies, which I think is better for my career, or something like adventure tourism that really interests me?

Our project

Three personas for our project

Geraldine
"The Tourist"

Toni
"The Urban-ite"

Mark
"The Commuter"

40

UserFriendly 2008
© Janice (Ginny) Redish and Whitney Quesenbery

Goals for the workshop

- **Understanding personas**
  - What they are
  - Why they are useful

- **Developing personas**
  - Planning and gathering data for personas
  - Analyzing that data
  - Creating personas

- **Using personas**
  - Making the personas part of the team
  - Doing persona-based reviews
  - Designing from and for personas

41

Making personas part of the team

42

Sharing the personas

- Formal
    - Through presentations, education sessions and posters
    - On the team web site or intranet
- Informal
    - Use them in stories and scenarios
    - Refer to them during meetings
    - Use them for design reviews
- Subliminal
    - Include them as the starting point for any discussion of "what users want"
    - Find ways to keep them in view
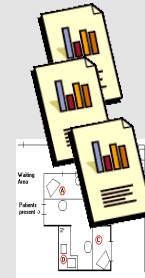
Kathy
Office Coordinator
Barnes & Grey Contractors

Married with three kids and four grandkids. (Family comes over every weekend).

30 minute commute to work

Likes to do a little shopping during lunch to save time

Best friend works nearby

Pet Peeve:
"Let me KNOW if you're not available"

Inspiration: Kate Gomoll

43

How can we share personas and make them part of the team?

44

Doing persona-based reviews

45

Persona-based, scenario-based reviews

- Select a persona
    - Become that person
    - Think like that person
    - Imagine yourself with any disabilities that person has

- Select a relevant task for that persona
    - What is the person most likely to want to do with the product?

- Walk through the product as the persona doing the task
    - Talk aloud as the persona doing the task
    - Make notes on how the persona reacts to the product

Let's do it!

46

UserFriendly 2008
© Janice (Ginny) Redish and Whitney Quesenbery

Designing from and for personas

47

What design suggestions would you have for the web site we reviewed?

48

About Whitney

Whitney Quesenbery
Whitney Interactive Design
p: +1 908-638-5467
e: whitneyq@WQusability.com
w: www.WQusability.com

Whitney Quesenbery is a user researcher, user experience practitioner, and usability expert with a passion for clear communication. She has been in the field since 1989, helping companies from The Open University to the National Cancer Institute develop usable web sites and applications.

Whitney is past-president of UPA and had participated in User Friendly conferences in China.

Before she joined the world of usability, Whitney was a lighting designer for theater productions. The lessons and stories from the theater stay with her in creating user experiences.

Visit her web site for articles and other resources.

49

About Ginny

Janice (Ginny) Redish, Ph.D.
Redish & Associates, Inc.
p: +1 301-229-3039
e: ginny@redish.net
w: www.redish.net

Morgan Kaufmann / Elsevier, 2007
www.redish.net/writingfortheweb

For more than 30 years, Ginny Redish has been helping companies and colleagues make products work for people.

Ginny provides training in user-centered design and in many of the specific techniques that make up the UX toolkit. She also mentors teams as they conduct UX activities from field studies to usability testing.

Ginny has been active in UPA from UPA's first conference in 1992.

Ginny is co-author of two of the classic books in the field:
  A Practical Guide to Usability Testing
  User and Task Analysis for Interface Design

Her new book is all about writing great content for web sites.

50