Personas:
Bringing Users Alive

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Why Personas

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Personas are...

- A portrait of a typical user, based on data
- A "real person" for whom the interface is designed
- Personas
  - Represent important demographics
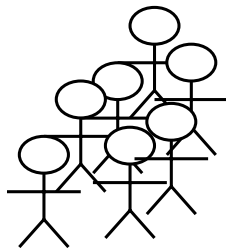 - Have a personal background and relationship
  - Have tasks and goals

Hypothetical...
  ... Not real

Archetypal
  ... Not average

Specific
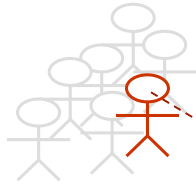 ...Not generalized

Archetype ≠ Stereotype

What do we know about these people?

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

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

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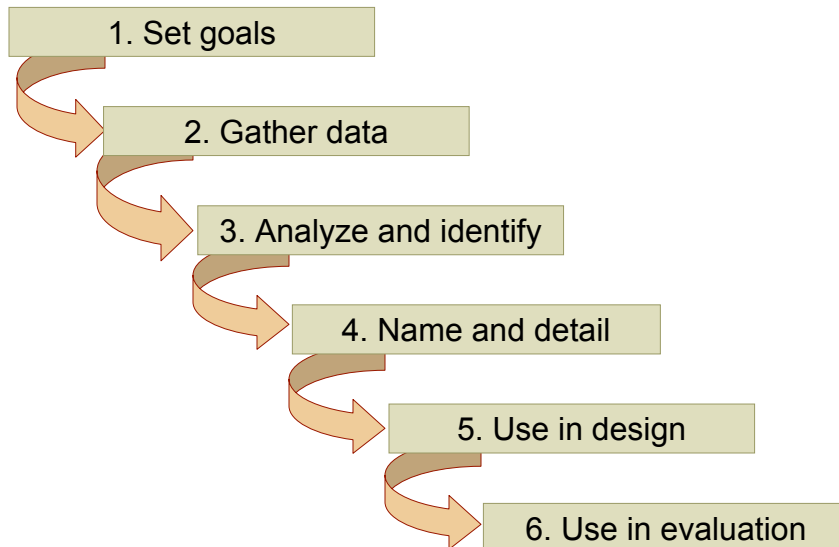
What do we know about this person?

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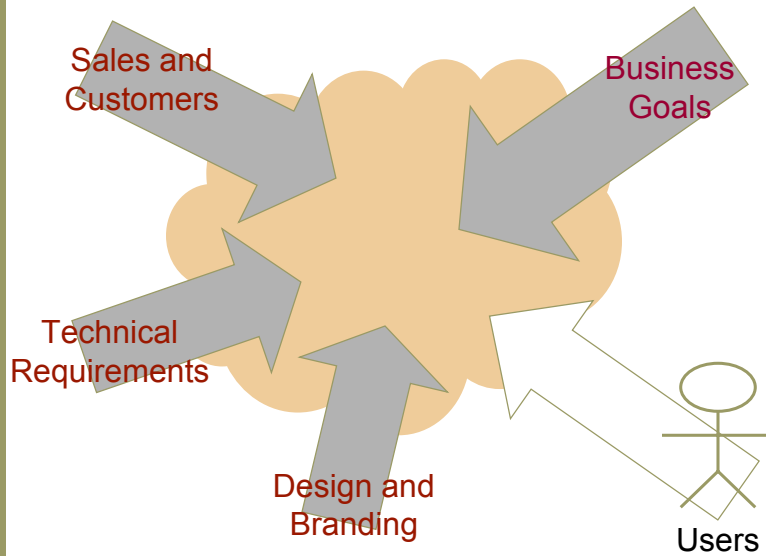- 35 years old, married to Joe, has a 5 year-old son, Mike
- Attended State College and manages her class alumni site
- Uses Google as her home page
- Last used the web to find the name of a local official
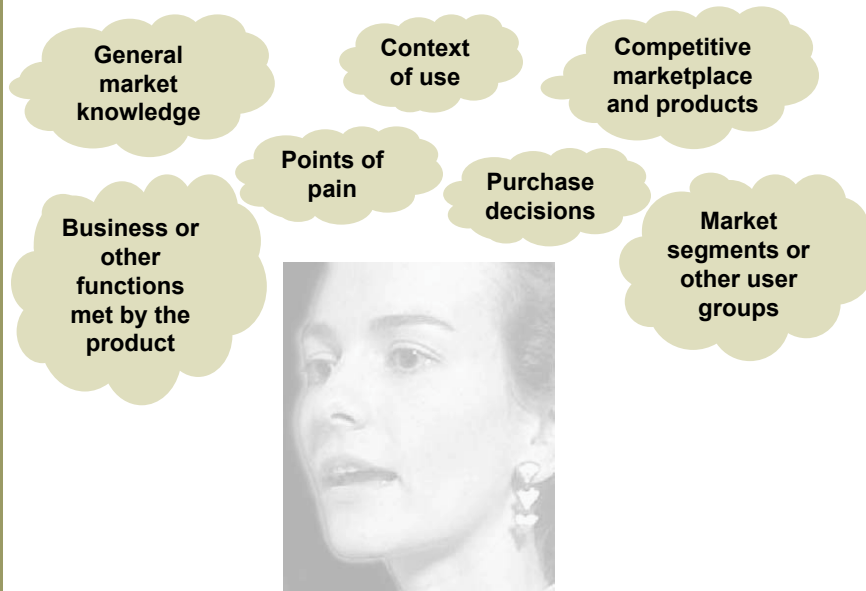
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Creating personas

1. Set goals
2. Gather data
3. Analyze and identify
4. Name and detail
5. Use in design
6. Use in evaluation

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Challenge #1: Hearing users at all

Sales and Customers

Business Goals

Technical Requirements

Design and Branding

Users

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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

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Challenge #3: Seeing the individuals
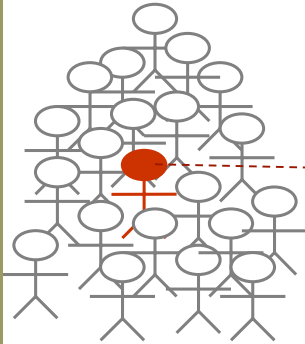
How do we understand each person, not as part of a group or a demographic, but as an **individual** with a history, goals, interests and a relationship to the product

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Challenge #4: Communicating clearly
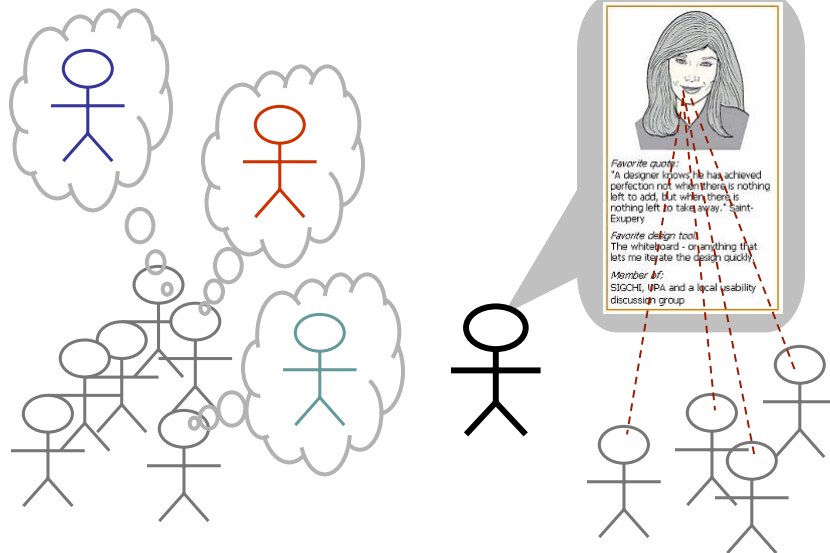
Favorite quote:
"A designer knows he has achieved perfection not when there is nothing left to add, but when there is nothing left to take away." Saint-Exupery

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

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

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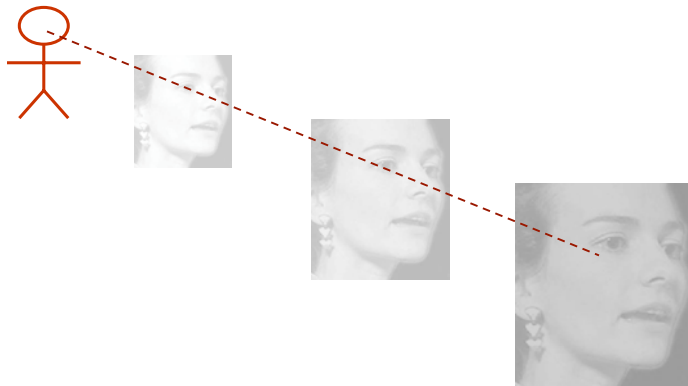
Personas tell stories

- Stories are patterns. They...
  - Present a coherent vision of the world
  - Store and transmit knowledge
  - Help organize facts in new ways

- Stories help us share information, vision, and values

The Springboard Project
Stephen Denning - www.stevedenning.com

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Creating Personas

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Creating personas

1. Set goals

- Hearing users at all
- Organizing and presenting data
- Seeing individuals
- Communicating clearly

2. Gather data

3. Analyze and identify

4. Name and detail

5. Use in design

6. Use in evaluation

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Creating personas

1. Set goals

2. Gather data

- Identifying sources of information
- Choosing research techniques
- Information to collect

3. Analyze and identify

4. Name and detail

5. Use in design

6. Use in evaluation

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Planning for gathering data

- Identify and narrow target users for research
  - Start from current definitions
    - 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?
  - Decide on a scope
    - Are you working within one large segment, or looking across different types of users
  - Eliminate peripheral or infrequent users
    - They may have important considerations, but do not drive the design

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Personas and market segments

- Both
  - May be based on similar or overlapping data
  - Present a set of portraits to help business make decisions
- But
  - Fill different needs…and are not the same

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

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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

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Listen for stories

- Stories reveal tacit information
  - What do they tell stories about?
  - Who is in their stories?
- Quotes help you hear their voice
  - What terminology do they use?
  - How they talk about the task or product

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Creating personas

1. Set goals

2. Gather data

3. Analyze and identify
- Understanding types of personas
- Finding patterns in the data
- Identifying possible personas
- Prioritizing the personas

4. Name and detail

5. Use in design

6. Use in evaluation

Patterns in personas

1. Strong **primary** and **secondary** personas, often based on tasks

2. A **collection** of personas, differentiated by key characteristics, or

3. A **matrix**, based on two orthogonal variables

A **spectrum**, based on 1-2 strongly related characteristics

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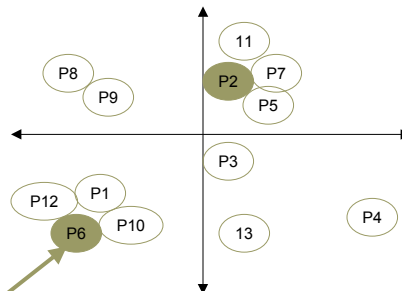## Look for patterns in the data

- Look for personal similarities in:
  - Interaction styles or the type of things they do with the product
  - People with similar backgrounds or personal characteristics
  - Patterns in attitudes or goals
- 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
- Look for shared stories

The web saves me time

Visits a lot of different sites

Uses e-commerce

Navigates easily

Mistrustful of info online

Leaves a site quickly

No-nonsense. Doesn't like cute

Very deliberate approach to web

Uses search

Likes to print long pages to read and save

Takes notes as she works

Identify possible personas

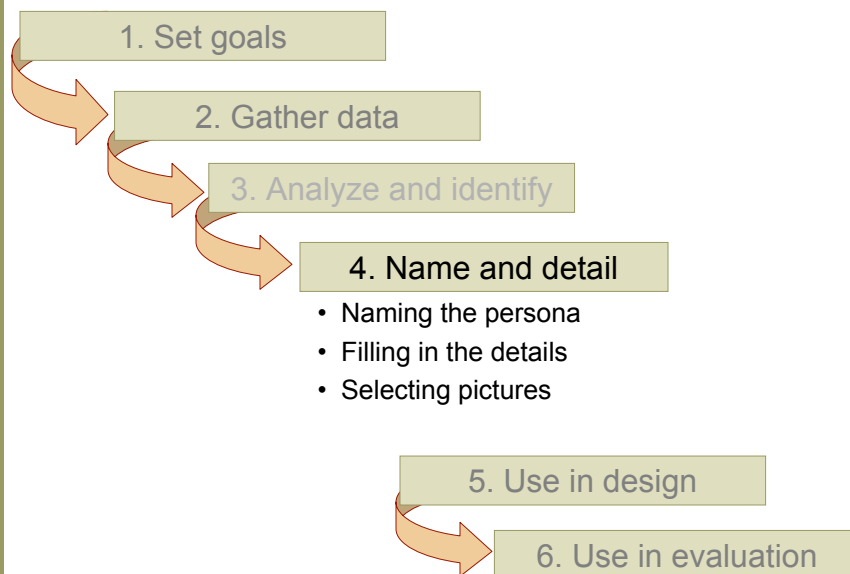- Look for variables that identify distinct differences between participants
- Test pairs of variables by plotting participants against them on a matrix
- Clusters of participants represent possible personas
- In each cluster, one participant will often be the inspiration for the persona

P8 P9 P11 P2 P7 P5 P3 P12 P1 P6 P10 13 P4

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Prioritizing the personas

- To choose a primary persona, look for:
  - The persona with the most (or most complex) needs
  - A persona who needs extra support to complete typical tasks
- The primary persona may not be the most important market segment
  - Meeting the primary persona's needs should not make it impossible for other personas (or valuable market segments) to be successful
  - The scope of the personas (ie, everyone who visits the site) may be broader than the market segments (ie, people who buy or use your product)

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Creating personas

1. Set goals

2. Gather data

3. Analyze and identify

4. Name and detail
- Naming the persona
- Filling in the details
- Selecting pictures

5. Use in design

6. Use in evaluation

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Fill in the details

1 Make a poster or area of the white-board for each persona

2 Go through your notes and add any material that that helps illustrate each persona

4 Give them a name and personal details: age, gender, family, job

3 Add some standard details for each persona:

- What are the top usability needs?
- How do they look for information?
- What are the risks for this person?
- What are their goals?

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Choose details that...

- Make sense in the context of the project, because they:
  - Reflect part of the environment that will be part of the context of use
  - Suggest how the persona might make an important decision
  - Explain past choices or history in similar activities
- Help differentiate the personas because they:
  - Expand on the differences between them, either directly or by analogy
  - Suggest different design choices in interaction, style or relationship
- Connect to usability issues, such as:
  - The 5Es
  - Learning styles
- Let the team get to know the personas by:
  - Revealing personal choices, lifestyle or activities
  - Being a little bit of fun

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Personas: Bringing Users Alive

Choosing pictures

- Each persona needs a picture
  - Usually a head shot, not a full photo
  - They should accurately reflect the demographics of the persona
  - They can be used to fill out the diversity of the personas
- Some attributes of the persona can be represented with images
  - Provides a balance for the words
  - Can be more suggestive and ambiguous
  - Good for visual learners
  - Good way to involve graphic designers to contribute to the personas

Sources of images
- Stock libraries
- Magazines
- Clip art
- Catalogs

- Don't use people you know
- Consider copyright and how the images will be used

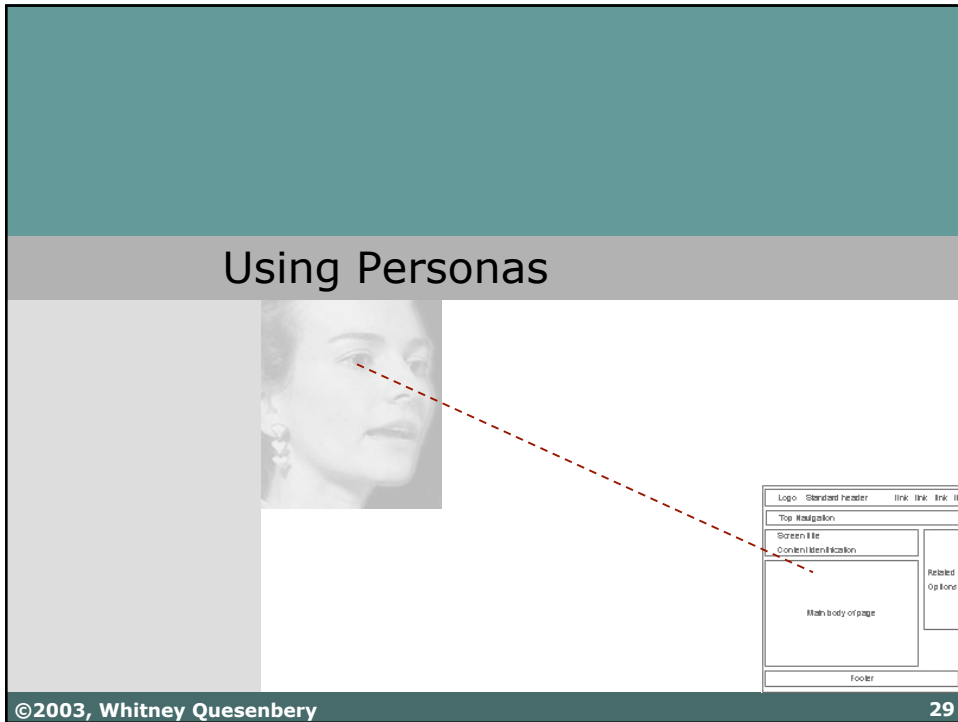©2003, Whitney Quesenbery   27

Validate the personas

- Review them with others who meet real users
  - Do sales or support staff recognize them?
- Review them with user or internal business stakeholders
  - Do they recognize themselves?
  - Do they recognize their colleagues
- Test them against market segments
  - Do they match, or at least make sense as relating to the same people?

Do they "work" as characters and match the storytelling test for:

Coverage
Coherence
Uniqueness
Goodness-of-fit

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Using Personas

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Creating personas

1. Set goals

2. Gather data

3. Analyze and identify

4. Name and detail

5. Use in design

- Create scenarios based on the personas that show what, when, why and how

- Use scenarios to develop design ideas

6. Use in evaluation

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Start with scenarios

- Short stories that illustrate how the persona will use the site or application
  - Focus on storytelling, rather than on representing task analysis
  - Show how the new design will solve specific problems, remove barriers, or minimize risk
  - Connect to characteristics of the personas
  - Use stories from the initial research as sources

Establish a goal and context
- Why is the persona using the product now
- What will make this interaction successful

Describe the interaction
- Stay at a high level and
- Avoid detailed descriptions of the interface

End with the result
- What happens as a result of this interaction
- What made it a success
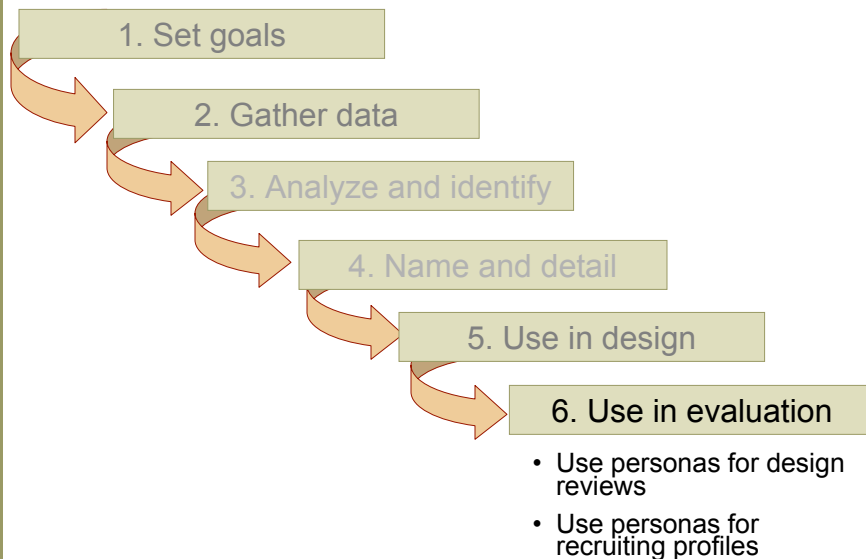
Personas have a point of view

Keep up with me...

"Of course I know it's a machine, but you do want it to know..."

"You ask for one thing, and you get all of this."

"We're already in 'stroke.' Will that stay, or will I have to add it..."

Personas can "comment" on design issues

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Personas keep design work grounded

- Use personas to keep work connected to real people
  - Design, plan or write for the personas, making sure a new design works for each of them
- Bring personas to design sessions
  - Use the personas to work through design problems
  - Role play to explore differences in how the personas react to different designs
  - Consider not just what they would do, but how they would prefer to do it

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Creating personas

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2. Gather data
3. Analyze and identify
4. Name and detail
5. Use in design
6. Use in evaluation
- Use personas for design reviews
- Use personas for recruiting profiles

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Use the personas for design reviews

- Use the personas (and their scenarios) for a task walk-through
- Conduct the review as you would an expert or cognitive walk-through, but from the point of view of a persona.
    - Walk through a task
    - Use the persona to make navigation choices
    - Look at each screen/page form the persona's perspective
    - Make notes of the interactions and choices

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Using scenarios for usability

- The scenarios become the scripts to walk through the interface design, and see whether it supports the features.
    - It's not a usability test, but a good way to check a design as it is created
- Scenarios can be the basis for QA testing
    - Do they show typical or unusual ways of using the program?
    - The context established in the story can be helpful in creating a realistic QA script

Every Thursday, lorem ipsum dolor ipspantio

Then, she lorem ipsum dolor manent and consqueitor

Sometimes dolor, lorum pusum and manent

When lorem ipsum dolor, she manent and consqueit

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Personas are a way to communicate

- **Communication within the design group**
  - Team exercise in creating the personas
  - Stimulus for design discussions
- **Communication to the rest of the development group**
  - As a basis for comparing designs
- **Communication to other stakeholders**
  - A vision of how the product will be used

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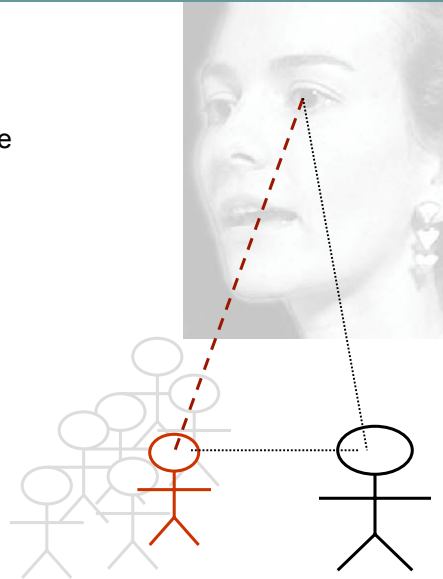
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Whitney Quesenbery designs interfaces for projects from web sites to applications and helps companies implement a user experience capability to improve the usability of their products. She is an expert in developing new concepts that achieve the goal of meeting business, user *and* technology needs.

As a developer of LUCID (Logical User-Centered Interaction Design), she promotes the importance of a user-centered approach and usability in design.

Whitney is a director of the Usability Professionals' Association (www.upassoc.org), and web site manager for the STC Usability SIG (www.stcsig.org/usability/)

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