Why personas?

Personas help us understand users, not as part of a group or a demographic, but as **individuals** with a history, goals, interests and a relationship to the product.
Usability depends on the point of view of a user

**Toni**

Toni is a young mother with a hectic life, with her job in a local shop, husband, home, and most of all her son, Marcus, a two-year-old bundle of activity.

She usually plans her family vacations, and makes all of the travel arrangements.

**Jerilynn**

Jerilynn works in the passport office in her county. Much of the work is routine, but she enjoys helping people, and hearing about the trips they are planning.
Different users may have different usability requirements.

Typical demographic profiles only give us a little bit of information

What does this information tell you 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?
Putting Personas to Work

When we can draw on a richer portrait, we can make better design decisions

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

Elizabeth: Expert Searcher

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
Personas are a portrait of a person who might use your products

**GEORGE**
"Professional updater"
Enquirer

23 years ago, George completed his Diploma in Hig Education and qualified as an Occupational Therapist. He now has a senior Occupational Therapist, is married with 2 daughters - the eldest is now in her sev year at university. the youngest is 16 and still home. He is a member of the Occupational Therapists that George now works with are qualified to degree level. For the couple of years, George has been applying for various positions at a higher grade without success. He feels that his lack of a degree is letting him down although he doesn’t approve of OT being a degree level profession. Both his and his wife’s salaries modest (George is earning around £33,000).

**Hypothetical...**
... Not real

**Archetype**
... Not stereotype

**Specific**
...Not average

Personas help us meet challenges in designing for usability

1. Hearing users at all
2. Making information useful
3. Seeing individuals
4. Communicating clearly
Creating Personas

Personas are created from user research and market demographics, combining quantitative data with qualitative insights.

Personas are created from user, market and demographic research

<table>
<thead>
<tr>
<th>Job or role: tasks and activities</th>
<th>Familiarity: old friend or new visitor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frequency: daily use or specialized need</td>
<td>Trusted, unknown or even mistrusted</td>
</tr>
<tr>
<td>Context: relaxed or under pressure</td>
<td>Deep knowledge or new subject</td>
</tr>
<tr>
<td>Choice: compulsory or independent</td>
<td>Relationship: insider, client/vendor, peer</td>
</tr>
</tbody>
</table>
Personas let us find different ways to think about the audience

- Look for similarities in:
  - Interaction styles
  - Personal characteristics
  - Patterns in attitudes or goals

- Look for similarities
  - By usage patterns
  - By domain knowledge or technical skills

- Look for shared stories
  - Attitudes
  - Language

The web saves me time
Visits a lot of different sites
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

Experts can provide valuable information to add to direct user research

- **Sales** spends time in customer sites

- **Trainers** know what’s hard and what’s easy to learn

- **Field service and call centers** hear about real problems in the users’ own words

- **Domain experts** remember what was it like in the field

- **Trade publications, user support forums, market research** all supply insights from the broader industry
You can still create personas, even if you can’t do any direct user research at all

- Gather existing knowledge
  - Read project definition or vision documents
  - Interview people with market or domain knowledge
  - Use existing user research or secondary research

- Create and test the personas
  - Go through the persona analysis and creation process
  - Review with stakeholders

- Use them cautiously
  - Do they hold up against new data?
  - Use them as a starting point for further research
  - See if they hold up against new data

Personas can be related in several different ways.

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
Personas can be organized around different levels of knowledge of the subject

Three personas for a health information site, based on level of knowledge and type of information they need

- SELF-HELPERS & CAREGIVERS
  - Assistance and Tools
    - recipes and diet
    - checklists
    - resources
  - Info in the tools leads to specific questions
  - learn what they need
  - gain more knowledge

- EXPERTS
  - Specific Questions
    - disease updates
    - diagnostic info

- INFOSEEKERS
  - General Information
    - warnings/risks
    - what is it

Whitney Interactive Design: Putting Personas to Work

Melissa
InfoSeeker
“I don’t like to go backwards to go forwards”

Goals:
Looking for new information

Typical Questions:
What is <condition>? Am I at risk?

Top Usability Need:
Engaging - I can tell I’m in the right place by the amount and level of information

Risks
Curious - needs to be drawn in. Little sense of site loyalty

Laura
Caregiver
“I want to know how to help my husband”

Goals:
Looking for helpful information

Typical Questions:
What do I need to know about it? What are the next steps I should take?

Top Usability Needs:
Effective - I need resources, and the right information

Risks
Needs information she can act on

Elizabeth
Expert
“I don’t stay on a site long if nothing jumps out at me”

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

Risks
Already knows the basics
Personas help us explore different patterns of use, and their implications for design.

<table>
<thead>
<tr>
<th>Company Size</th>
<th>Number of Roles</th>
<th>The Focused Worker</th>
<th>The Office Assistant</th>
<th>Office Leader</th>
<th>Jack-of-all-Trades</th>
</tr>
</thead>
<tbody>
<tr>
<td>large</td>
<td>single-role</td>
<td>Long daily sessions</td>
<td>Knows the details</td>
<td>Trains her staff to do it her way</td>
<td>Runs the place</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Knows the details</td>
<td>Needs shortcuts for repetitive tasks</td>
<td>Considers payroll a sensitive function</td>
<td>Constantly interrupted</td>
</tr>
<tr>
<td>small</td>
<td>multi-role</td>
<td>Proud of her job, but ready to leave at 5</td>
<td>Wants to check each item carefully</td>
<td>I’m in charge, and I get it done right</td>
<td></td>
</tr>
</tbody>
</table>

Personas show action

Scenarios and stories create the life of a persona, showing them in action.
Personas tell stories that reveal patterns of use

- 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

Stories communicate efficiently.

Tanner was deep into a game - all the way up to level 12 - when he got a buddy message from his friend Steve with a question about his homework. He looked up with a start. Almost bedtime and his homework still not done. Mom or Dad would be in any minute...

The Tanner persona and scenarios are based on work in The Personas Lifecycle by Tamara Adlin and John Pruitt.
Putting Personas to Work

Stories and scenarios help us imagine how a persona will use a product.

Springboard Stories
"needs and goals"

Key Scenarios
"context for actions"

Design Map
"perception, actions and barriers"

Use Cases
"sequence of actions"

Evocative

'Points of Pain' Stories
"barriers to overcome"

Narrative Scenarios
"what happens and why"

Flow Diagrams
"actions and decisions"

Prescriptive

Stories from the personas can spark design ideas

Our products have different names in different countries, so it can be hard to manage international customer service.

Let's think about how we could make it better. What if it went something like this...
Mary was filling in on payroll while Kathy, the office manager, was away. On Thursday, Kathy left her a message to remind her about some special bonus checks for that week.

Mary had not used the payroll program for a while, and only remembered that special checks could be difficult. Reading the post-it notes on the wall next to the computer, she scanned for instructions, and was relieved to find one for bonuses.

Following these brief notes, she found the right screen and puzzled her way through the on-screen instructions. Moments later, the missing checks were rolling out of the printer. As she breathed a sigh of relief, she made a copy of the checks to show Kathy when she returned - just in case.

Use personas to explore scenarios

In this scenario:
- The task is difficult
- Unfamiliar users may need to complete it because the task cannot be deferred
- Primary users make themselves cheat-sheets to help remember functions

Design Ideas:
- Add a feature to allow primary users to add “if you need to…” instructions for replacements
- Use a wizard to walk users through the task
- Be sure the wizard has a checklist for the complete task - can users add their own procedural notes?
Personas keep design work grounded and ‘comment’ on design issues

- 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

Personas review

Personas can guide reviews, giving them more validity and helping avoid personal opinion
Review personas with stakeholders, especially those who have good contact with users

- 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

Review layouts and information architecture

**George**
“Professional upoderer”
Enquirer

**Scenario**
George has saved himself a target of getting a plan together within a few weeks. He is looking for how to get a degree, keywords are ‘management, healthy, occupational therapy’. He is at home in his study with a beer.

**Why Do They Visit The OU**
George saw an advert for the OU on ‘Public Servant’ online.

Open University, Four Portals Strategy Review
Be sure that every persona has a successful path to critical information

**SITE WALK-THROUGH WITH PERSONAS – 23 JUNE 2004**

<table>
<thead>
<tr>
<th>Persona</th>
<th>First Click</th>
<th>Use of Search</th>
<th>Path to Site</th>
<th>Summary</th>
</tr>
</thead>
</table>
| Ruth    | Student Home High or Slugging at the OU 1 click (traffic) | Not Likely to search | 1. Click OU Home, Ruth chooses ‘studying at the OU’  
2. Click there either browse the subjects – Maths, Economics, Social Sciences and is more interested in study.  
3. On click asks ‘Find a person’ and finds out about events in their area.  
4. Alternatives  
Ruth now starts from Student Home where she  
tries first course but is pulled by the  
mechanical nature of the page.  
5. She goes into qualification page and from  
there (OU) through to more information  
about the BSc.(Hons). degree.  |
| George  | Student Home 1 click (traffic) | Uses search only when browsing (tabs) | 1. Click OU home page, selects ‘studying at the OU’  
2. He then clicks into Health and Social care and is a bit confused by the apparent lack of the offer.  
3. He has Management and eventually comes across the BA (Hons) degree which talks about the flexibility of subject matter which appeals to him.  
4. He also notices and navigates to the Credit Transfer information – he may be able to count his Degree towards the degree.  |

- Generally successful although a current student Ruth is many ways like an explorer.  
- Success depends on her finding links that help her maintain a connection to the OU and stay engaged with each course.  
- We need to ensure that the site does not leave current students for granted, and offers appropriate support even on the student home.

Whitney Interactive Design: Putting Personas to Work

**Personas can “walk the wall” to show paths through a site or application**

What are the most-used paths? Are there paths that need to jump across the information hierarchy?
Personas improve expert reviews

Scores on heuristics for Edith and Matthew for news sites:

<table>
<thead>
<tr>
<th>Ratings</th>
<th>Edith</th>
<th></th>
<th></th>
<th>Matthew</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>observations</td>
<td>total</td>
<td>percent</td>
<td>observations</td>
<td>total</td>
</tr>
<tr>
<td>He problem</td>
<td>4</td>
<td>8</td>
<td>12</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Minor hindrance</td>
<td>3</td>
<td>12</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total for 4 &amp; 5</td>
<td>7</td>
<td>20</td>
<td>37.0</td>
<td></td>
<td></td>
<td>14</td>
</tr>
<tr>
<td>Serious problem</td>
<td>2</td>
<td>20</td>
<td>19</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task failure</td>
<td>1</td>
<td>14</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total for 2 &amp; 1</td>
<td>3</td>
<td>34</td>
<td>63.0</td>
<td></td>
<td></td>
<td>22</td>
</tr>
</tbody>
</table>

Table 2. Sample data table

Designing Web Sites for Older Adults: Expert Review of 50 Web Sites – Ginny Redish and Dana Chisnell for Amy Lee, AARP

www.aarp.org/olderwiserwired

Even persona sketches can help focus reviews on use needs

**Experienced Geek**

This is the current typical New Egg user. He is young, techie and knowledgeable. Whether he’s building the perfect system, checking out the new toys or doing a favor for a friend, he’s always in the market for new gear. When he hits the site, he knows what he’s looking for:

- The best price on a specific item
- The best product to meet a specific need
- He’s not concerned with subtitles or pretty graphics – just get him the information he needs... and then get him the products as fast as possible.
- He needs a user interface with:
  - Fast paths to products, with all the information in one place
  - All of the technical details... all of them
  - An easy way to store research, so the final purchase is easier.

**Online Shopper**

This user is an experienced online shopper. Amazon sends her Christmas cards, and she knows how to find the best airline fare. She’s wary about being nervous about her credit card or e-commerce security.

One thing that does scare her is buying e-gear. Why can’t the computer and electronics industry make fewer products and give them easier to remember names? She used to think she knew this stuff, but she still remembers when she bought the wrong graphics card — and couldn’t return it.

She likes being offered advice — as long as it is reasonable, and actually helps:

She needs a user interface with:

- Easy-to-read information about each product (on any page with product info)
- Information about requirements, warranties and other policies in clear, plain language
- Good pictures to help her recognize products she has seen in an article or store

**Tentative Shopper**

This user is a more general consumer. He is likely to be looking for consumer electronics or computer accessories, not parts to build his own machine. He’s a little embarrassed about how little he knows about electronics, but this only makes him a little angrier when sales don’t give him the information he needs. What he really wants is to ask his friends, but you can’t do that forever — and even then, he has to get online and find what they recommend.

He needs an interface with:

- Guidance that doesn’t make him feel foolish
- A way to ask questions, or find products without part numbers or too precise language
- Support in finding compatible products (or avoiding incompatibilities)

From a comparative review of technology shopping sites

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Putting Personas to Work

Personas evaluate

Personas help with usability testing by providing demographics for participants and test scenarios.

Personas should match usability participants

Current job
Prior education
Web/technology use
Age
Goals

Problems recruiting may mean problems with the personas

GEORGE
Professional
Enquiring

23 years ago, I
Education and
He is now 50
with 2 daughters.
and 1 year
at university.
Most occupations
are male.
Over the years,
he has
never found
a job.
Wanting more
"professional"
recognition.

Info Seeking and Web Habits
IT Librarian - uses web at work
and at home for "fact checking" and finding out about sport.
### Putting Personas to Work

**Personas scenarios become usability test scenarios**

- Scenarios supply tasks and context descriptions for usability tests
- Walk personas through the tasks to test the prototype
- Match participant and persona actions and paths to test design assumptions

**Persons are a way to communicate**

- **Within the design group**
  - Build consensus in creating the personas
  - Stimulate design discussions
- **Within the development group**
  - Explore alternatives and understand trade-offs
- **To managers and other stakeholders**
  - A vision of how the product will be used by real people

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Whitney Interactive Design: Putting Personas to Work
Putting Personas to Work

About Whitney

Whitney Quesenbery
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Whitney Quesenbery is a user interface designer and usability specialist with a passion for clear communication.

She is an expert in developing new concepts for product designs and has produced award winning multimedia products, web sites, and web & software applications.

Whitney is past-president of UPA - Usability Professionals' Association and is a leader in the STC Usability and User Experience Community.

Before she was seduced by a little beige computer into the world of usability, Whitney was a theatrical lighting designer on and off Broadway. The lessons and stories from the theatre stay with her in creating user experiences.

Reading Matter


Personas and Narrative in The Persona Lifecycle: Keeping People in Mind During Product Design by John Pruitt & Tamara Adlin Morgan Kaufmann Press, 2006

More articles and publications on my web site: http://www.wqusability.com/articles/personas_storytelling.html