Making Personas Part of Your Team

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
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.

Products, services, processes all require people

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

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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

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**
- **user / task matrix**
- **card sorting**
- **task analysis, task flows, workflows**
- **rapid, iterative usability tests of prototypes with users**
- **conduct benchmark usability test**
- **field studies: watch, listen to, and talk with users as they work**
- **analyze search logs and server logs**
- **articulate your business goals**

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

**A portrait of a typical user**

**GEORGE**

“Professional updater”
Enquirer

23 years ago, George completed his Diploma in Higher Education and qualified as an Occupational Therapist. He is now a senior Occupational Therapist with 2 daughters - the eldest is now 10 years old, the youngest is 3 years old.

Most Occupational Therapists that George works with are qualified to degree level. In the past couple of years, George has been applying for jobs at a higher grade without success. Although he doesn’t approve of OT’s level of responsibility, both his and his wife’s salaries are modest (George is earning around £25k while his wife is earning around £23k). George is now looking for an alternative career path.

**ABOUT GEORGE**

- Senior Occupational Therapist working in a large NHS hospital
- Higher 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
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?

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
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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
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Challenge #1: Hearing users at all

- Business Goals
- Sales and Customer Service
- Technical Requirements
- Design and Branding

Challenge #2: Organizing the data

- General market knowledge
- Context of use
- Competitive marketplace and products
- Business or other functions met by the product
- Points of pain
- Purchase decisions
- Market segments or other user groups
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Challenge #3: Seeing the individual

Challenge #4: Communicating clearly
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Challenge #5: Dealing with assumptions

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Developing personas

- Planning and gathering data
- Analyzing the data
- Creating the personas
- Using the personas

Planning and gathering data for personas
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

Personas are not market segments

PERSONAS
- Built on different types and styles of interaction
- Focus on defining user’s goals and how to meet them
- Primarily based on qualitative research
- Rich understanding of people

MARKET SEGMENTS
- Built on different buying behaviors
- Focus on how the business can reach and attract them
- Relative quantitative size of segments is important
- Usually based on quantitative data (surveys)
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

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
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?

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.
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Analyzing the data we gathered

Visits a lot of different sites
Uses e-commerce
Navigates easily

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

Organize the information

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Look for patterns in the data

- Look for personal similarities in:
  - Interaction styles
  - People with similar characteristics
  - Patterns in task approach 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
  - Stories reveal attitudes and emotional factors

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?

In each cluster, one person will often be the inspiration for the persona.
Organizing your personas

- **Strong primary and secondary personas**, often based on tasks

- **A collection** of personas, with different key characteristics, or

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

Our project

**Analyzing the data:**

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

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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

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
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

Examples from Whitney’s notes

**Jason**
- **Name:** Jason
- **Market Segment:** Education
- **Hodge:** I'd attend a university
- **Age:** 18
- **Add:** Woman of beauty over the summer
- **Education:** Upper-class, about to take A-Level
- **Key points:** car, travel, fast, but without driving

**Rechel**
- **Name:** Rechel
- **Market Segment:** Traditional Part Time
- **Hodge:** I’d be a singer some day
- **Age:** 21
- **Add:** Woman of beauty over the summer
- **Education:** Music
- **Key points:** car, travel, fast, but without driving

**Abila**
- **Name:** Abila
- **Market Segment:** Passionate Chef
- **Hodge:** I’d be a writer some day
- **Age:** 21
- **Add:** Woman of beauty over the summer
- **Education:** Culinary
- **Key points:** car, travel, fast, but without driving

**George**
- **Name:** George
- **Market Segment:** Real Estate
- **Hodge:** I’d be a real estate agent some day
- **Age:** 21
- **Add:** Woman of beauty over the summer
- **Education:** Real Estate
- **Key points:** car, travel, fast, but without driving

**Martin**
- **Name:** Martin
- **Market Segment:** Blue-Collar Worker
- **Hodge:** I’d be an engineer some day
- **Age:** 21
- **Add:** Woman of beauty over the summer
- **Education:** Engineering
- **Key points:** car, travel, fast, but without driving

**Margaret**
- **Name:** Margaret
- **Market Segment:** Serious Learner
- **Hodge:** I’d be a professor some day
- **Age:** 21
- **Add:** Woman of beauty over the summer
- **Education:** Professor
- **Key points:** car, travel, fast, but without driving
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Our project

Three personas for our project

Geraldine
“The Tourist”

Toni
“The Urban-ite”

Mark
“The Commuter”
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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

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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 Peave: "Let me KNOW if you're not available"

Inspiration: Kate Gomoll

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How can we share personas and make them part of the team?
Doing persona-based reviews

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

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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.

About Ginny

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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.