
Personas at Work



Carol Smith

Twitter: @carologic

NEOUPA

World Usability Day 2010

Design for Everyone
is

IMPOSSIBLE

Who will use it?

What they need to do?

Constraints...



Scope for Success

- Research and Discover
- Document
- Analyze
- Understand

Focus Your Efforts Until...



Found Patterns

- Identified groupings or clusters of users.
- Overlapping characteristics relevant to design problem.

We Are 80% Sure We Know...

- Primary user's
 - tasks
 - goals
- Prioritize with:
 - vision (why we are doing this?)
 - business needs
 - etc.
- Awareness of what not known (yet).

At Least 80%



Are Personas Like Frankenstein?

A Brief Review

Well Crafted = Based on Research

- Model and describe the user's:
 - Goals
 - Needs
 - Characteristics
- Represent primary user group(s)
- Archetype

Common Understanding

- Base from which to start:
 - Creating test scenarios.
 - Designing the product.
- Team can:
 - Think about the user easily.
 - Consider large amounts of data quickly.
 - Use to guide design decisions.

Personas Are Not

- Reusable across projects.
 - Except in specific situations.
- Real individuals or average users.
- Fictional individuals.
- “Frankenstein” (characteristics of individuals are not sewn together).
- Developed via brainstorming sessions.

Different Types of Personas

- Different teams and uses will require different types.
 - Think about persona's users.
- Make multiple versions and get feedback:
 - Narrative
 - Bulleted
 - Hybrid

Sam Peterson

Editor, Math Specialist, 5 Years Experience

Sam is 29 years old and has a BS in Mathematics from Ohio State University. His classmates almost all wanted to be teachers, but he didn't share that interest. He wanted to improve the educational system and when he saw a job opening at an educational company he felt that it would be a great opportunity to do just that.

In his current role he feels he has the opportunity make great courses for teachers and students. Because of this Sam gets upset when he hears that the users have found mistakes that need to be corrected. It means that time needs to be spent fixing a previous course instead of making new ones.

While he was a student he took organizational psychology courses and found that he enjoyed management challenges. He manages a group of freelancers who are pretty responsible and usually don't need reminders to get their work in which allows him to focus on his work.

Sam also manages many different projects at once and has to keep track of what assets are connected to each one. He needs a good tool to track all of the assets for each of his projects (images, documents, etc.). He is currently using a series of Excel spreadsheets to manage the work. He edits courses as they come to him and then sends them on to the publisher. He usually has to go back and forth with the publisher a few times to get everything just right which is very frustrating to him.

Sam says despite the frustrations, his company is great to work for and the benefits can't be beat. He isn't sure what is next for his career - he has taken some training that has been offered but is not currently interested in taking on new responsibilities



"I need help keeping track of all of the assets for each of my projects."

Persona Example 1: Narrative

Sam Peterson

Editor, Math Specialist, 5 Years Experience

Technology

- Does personal banking, shopping and email online

Personal

- 29 years old
- Lives in New Albany, OH
- BS in Mathematics from Ohio State University
- Took organizational psychology classes and enjoys management challenges

Concerns

- Needs a good tool for tracking all of the assets for each of his projects
- Too much time is spent fixing previous projects instead of working on current ones
- Resigned to having to go back and forth with the publisher a few times to get everything just right

Goal

- Improve the educational system by making great courses for teachers and students

Professional

- Frequently frustrated by work
- Company is great to work for (benefits, etc.)
- Has taken training offered
- Not currently interested in taking on new responsibilities

Responsibilities

- Manages many different projects at once
- Manages a great group of freelancers allowing him to focus on other things
- Keeps track of many separate assets for each project
- Checks work before passing it on to the publisher



“I need help keeping track of all of the assets for each of my projects.”

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Technology

- Does personal banking, shopping and email online

Concerns

- Needs a good tool for tracking all of the assets for each of his projects
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Goal

- Improve the educational system by making great courses for teachers and students

Responsibilities

- Manages many different projects at once
- Manages a great group of freelancers allowing him to focus on other things
- Keeps track of many separate assets for each project
- Checks work before passing it on to the publisher



- Sam is 29 years old and lives in New Albany, OH
- He has a BS in Mathematics from Ohio State University where he also took organizational psychology courses and found that he enjoyed management challenges
- He has never been interested in teaching, but wants to improve the educational system. When he saw a job opening at an educational company he felt that it would be a great opportunity to do just that
- Sam says despite the frustrations, his company is great to work for and the benefits can't be beat.
- He isn't sure what is next for his career - he has taken some training that has been offered but is not currently interested in taking on new responsibilities

"I need help keeping track of all of the assets for each of my projects."

Persona Example 3: Hybrid

“Irrelevant Information”

- Creating a mnemonic.
- Help recall significant details about user segments.

Profiles are Broader

- Represent secondary user group(s).
- Basic information about a target user.
 - Based on assumptions and some research.
 - Can be created quickly.

Judy Long

Retirement Plan Administration Manager

Age - Gender	37 years - Female
Goals	To enable and support Administrators in her group that help clients successfully manage their retirement plans.
Office Setting	She has a small office. The Administrators are in cubicles.
Uses System to...	Monitor company performance and Administrator's activity. Creates special reports based on what she needs to know and what the client is asking for.

Profile's Are Not

- Detailed documents with many personal characteristics.
- Reusable across projects.
- Interchangeable with Personas.

Get The Persona To Work

Communication Plan

- Successful persona program.
- Detail when, how, and to whom each piece of information will be shared.
- Each activity assigned to a specific individual to complete.
- Plan communication to the team:
 - Who the personas are.
 - How to effectively use them.

Communicate Who Persona Is

- Approach may include:
 - Meetings
 - Web site
 - Posters
 - Emails (highlights/tips for use)
 - Events
 - Artifacts

Review Session with Team

- Affirmations of profiles and personas:
 - Look familiar.
 - Can relate to them.
 - Convincingly real.
 - Minimal unrelated details.
- Show data:
 - Keep process transparent.
 - Explain details of creation.

Introduce In-Person

- Meet with all team members *in person* to introduce personas and profiles.
- Introduce each persona:
 - Not: “I made Olivia with...”.
 - “This is Olivia”
 - “Olivia has...”

Introduction (cont)

- Answer questions.
- Clarify how the personas are to be used.
- Artifacts to use and remember personas.
 - Progressively disclose artifacts:
 - Tell the story about the personas.
 - How personas use the product(s).

Managing Personas

Updating Personas & Profiles

- Regular updates:
 - Behaviors may change.
 - Priorities and goals may change.
 - Primary user-group may change.
 - Product and/or technology will change.

Plan for Updates

- Design in an easily updatable format.
- Add to schedule for events that should trigger reviews (usability testing, etc.).
- Assign responsibility.
- Plan for dissemination – update Communication Plan.

Create Persona Families

- Expand scenarios to include all aspects of experience:
 - Warehouse Software
 - Stocker
 - Customer Service Representative
 - Shipping Clerk
- Inform new persona development efforts.

Reuse Personas and Profiles

- Up-to-date personas can be used indefinitely for the same product.
- Do not re-purpose personas for disparate products.
 - Needs, goals and other dimensions will vary.
 - Different resulting scenarios.

Personas...

- Are models that represent all of your research in a form that facilitates communication and decision-making.

Controversy

- Irrelevant information
- “Pseudo-science”
 - Not trying to be scientific.
 - Statistical methods used to analyze data.
 - Rigorous, repeatable methods.
 - Result in mostly qualitative data.

Challenges

- Personas only truly meaningful in a given context.
- Effort to seek out elements of comparison:
 - Motivators.
 - Demographics.
 - Technology use.

Benefits

- Personas and profiles allow the team to:
 - Learn and remember user's efficiently and effectively.
 - Role play or “channel” the users when determining a design solution.
 - Reduce chances decisions will be made based on seniority or influence in the organization.
 - Make a better product.

Benefits (cont)

- Help teams avoid:
 - Designing for themselves/technology.
 - Designing for everyone.

Start Now

- Work on creating Profiles of users now.
- Schedule and conduct research with users.
- Expand the Profiles into Personas.
- Each project helps answer more questions for Persona development.



World Usability Day

Making life easy!

Sign the Charter: <http://www.worldusabilityday.org/>

Contact

Carol J. Smith

(773) 218-6568

Twitter: @carologic

carol@mw-research.com

Midwest Research, LLC

<http://www.mw-research.com>

For More Information:

- Designing for the Digital Age: How to Create Human-Centered Products and Services by Kim Goodwin (one chapter)
- The Persona Life-Cycle by John Pruitt and Tamara Adlin
- The User Is Always Right: A Practical Guide to Creating and Using Personas for the Web by Steve Mulder
- The Inmates are Running the Asylum by Alan Cooper
- Observing the User Experience: A Practitioner's Guide to User Research by Mike Kuniavsky