



Using Personas Effectively

I. Creating Personas



What is a Persona?

Design Tools

They help the designer ensure that the design matches the needs of the future users.

Communication Tools

They help the designers communicate who the design serves, to other designers, developers, stake-holders and clients

User Models

Rich representations of users, to act as a trigger for empathy.

A Journey

It's as much the creation of the personas that matters as the final artefact.



What does one look like?

Geoff Marchens (48)

Wildlife Photographer

Freelancer, he's worked on assignments for National Geographic, BBC wildlife, and the Kenya Wildlife Service.

Lives in Nairobi for much of the year, but has a flat in Cheltenham.

Has recently switched from 35mm to digital photography for some projects. He uses a laptop, to view shots in the field, especially when he's further away from home.



He's not used a computer much, but he's very experienced is more traditional photo editing techniques.

Drives a Land Rover Discovery. All his electrical gear is powered by a mains inverter running off the Discovery's battery - which limits how much electrical gear he can use.

Goals: Spend less time travelling from base to the field. Run his business from the field.



Where do Personas come from?

Data for Personas can come from...

1. Ethnographic Studies
2. User Interviews
3. Field Studies
4. Marketing Information
5. From the Designers imagination!



Ethnographic Studies

Ethnographic Studies are time consuming and expensive, and therefore probably impractical for everything but the largest projects. However, they give the most accurate and detailed information from which to create personas.

Observe how people do their jobs (or relevant activity).

What tools do they use?

Who do they work with?

What problems do they encounter?

How do they manage their time?



User Interviews & Field Studies

User Interviews are quicker (and cheaper) than ethnographic studies. For the majority of studies they provide the best trade-off between accuracy and effort.

Ask people how they perform their jobs (or other activity).

What tools do they use?

Who do they work with?

What problems do they encounter?

How do they manage their time?

Same questions, different method. If possible this should be done in the interviewees work environment, which will provide a few extra clues. It also allows interviewees to show the interviewer relevant things in their environment. (**Field Studies**)



Marketing Information

Marketing information can provide useful input.

Large corporations often analyse their user base in great detail for marketing purposes.

Market segments appear similar to Personas, but they are not the same. They lack behaviour information, which is a critical component.

It is also possible to have more than one Persona for a market segment.



From the Designers imagination!

Off the top of the **designers head!** This is the worst place to get personas!

This is nothing more than documenting assumptions.

For small, quick projects this may be the most practical.

It does provide some benefit, but it requires more experienced designers and works best in a domain that is already well known.

Higher risk of error, which can lead to inappropriate design decisions.



User Interviews & Field Studies

Interviews and Observation

Finding users

Conducting interviews

What to ask

What to record

Field observations



Finding Users

Existing user-base.

Cheap & Simple!

Best for redesign / up-versioning projects

Market Research firms

Can find people who match your specifications

This can be expensive, especially if your spec is very tight

Little point in being specific about technology

Specify needs instead



Planning an Interview set

Interviewing is a **two person job**.

For most projects interviews should take an hour or so.

Plan to do four a day, maybe with one in contingency in case of last minute cancellations. **Never do more than six.**

It's helpful if you can get time between interviews to discuss them and record significant findings, so leave 20-30 minutes between interviews. Give yourself an hour at the end of the day to go over the whole day.

If possible take a half a day out at the end of the week for further analysis.



Conducting Interviews

User interviews for Persona creation are all about **exploration**.

One person drives the interview, one records.

Explain what you're doing. Try not to be authoritative.

A typical interview will last about an hour.

The first interview is always the hardest (and often quite painful!). The first 5-10 should be seen as pilots - finding out what are useful questions and generally getting the lay of the land.

Start with an open question, to get the conversation moving.

Don't bother with focus groups - they're a waste of time.



What to ask, what to record

People will tend to talk about their concerns - this is a good thing - let them. You're trying to determine their **goals**.

It's best not to ask closed questions. Allow the interviewee to guide the conversation towards the things that concern them most.

What is their job?

What are the problems in their job? What is easy / works well?

Who do they work with? How do they organise things?

Can you give me some examples?

Mental models - get people to explain things to you.

Don't lead the witness. It's easily done.

Don't ask straight questions!



What to ask, what to record

Sometimes participants want to talk about specific features of a system they already use.

Dig underneath to find the **motivation** behind their ideas.

Specific ideas can sometimes be useful later in a project, but it's not helpful for persona creation. Visibly make a note, and **gently** move the conversation back onto more useful ground.

If a participant isn't forthcoming, cut your losses and terminate the interview.



Collating User Interviews

Patterns will start to emerge during the interview process.

The aim is to **group interviewees** into relevant clusters. This will happen naturally.

Each cluster will ultimately become a distinct **persona**

For a typical project you'll end up with anywhere from 2-8 personas although there is no right number.

People should be groups according to what their **goals** are. Not by demographics. Often these will correlate however.



Knowing when to Stop

Stop interviewing when you routinely recognise which cluster someone will fall into almost immediately.

It's still possible that a new type of person might appear, but as you interview more people that becomes increasingly improbable.

You have to predict how many interviews you'll need up front. As a rule of thumb - about 40 is a good number.

That's 10 days of interviews.

If you're not seeing a pattern your **scope** is probably too wide.



Creative Writing

For each cluster we can now write a persona description.

This is the fun part! Your Persona needs...

Name. The phone book is good for getting random names.

Age. Be precise.

A **job, family, friends, income** level.

Relevant **lifestyle**

Add **constraints** - real people have them!

Relevant **skills** (or lack of)

A **photo** (use a stock photo library)

This should be consistent, and based on the real people you talked to. It doesn't have to be slavish.



Adding Goals

List two to four Goals. These are the things your design must help your persona to achieve.

Some goals will relate closely to the project.

Some will be more general - even lifestyle goals.

Valid Goals

Make sure I never run out of my medicines

Always have music to listen to

Leave work on time to collect the kids



Testing Personas

Personas should be recognisable by people who have frequent contact with the appropriate user base.

Good: "Oh, I know someone just like him!"

Bad: "That doesn't seem right, someone like that would never..."



Dividing the Workload

There is a temptation to try and relieve the designer of the **"burden"** of going out and doing user research by having "researchers" do the persona creation and then hand them off.

This is a mistake!

The designer must be able to empathise with the target audience, and they do this through the Persona.

But their understanding comes from the **process of research**.

Only if the designer has had a lot of contact with user community already should this even be considered.



Questions

<http://www.surfaceeffect.com/services/training/upe/>