



Using Personas Effectively

2. Using Personas



Why bother with Personas?

Three major traps for Designers

Self Referential Design

The Elastic User

A brilliant solution to a non-existent problem



Self Referential Design

In the words of Monty Python...

You're Weird!

Designers see the world differently.

We have perfect knowledge of the systems we design (sometimes!). Our users never do. We understand the models we invent. Users frequently don't, and never completely.

So if we design things the way we want them we'll end up with lousy products that don't work for **normal people**.

We're weird!



Elastic Users

"The users will want to do ..."

"This user might like to ..."

"That other user might ..."

"Power users would want ..."

"Novice users ..."

Without a clear vision of who your user is you end up designing for all sorts of conflicting demands - the design loses coherence.

You end up with MS Word; over 2,500 features (as of 2003).



Undefined Problem

If you don't define the **problem** (and the **context**) then you haven't a hope of **solving** it!

"Who" is a vital part of that context. Without it the problem can never be entirely defined.

Therefore it can never be entirely solved.

Christopher Alexander's work on Architectural **Patterns** (real architecture, not software!) defines a pattern as being **a solution to a problem, in a context** (put very crudely).



Using Personas

Personas for ...

Design

Communicating with your client



Who to design for

You have a few Personas.

Now you must decide which one you're going to concentrate on for the design.

Sometimes this is very clear cut, sometimes not. Either way you need to discuss this with your client.

Marketing often has a view on this, so they should be included in any discussion.

Your selection will become the **Primary Persona**.



Secondaries, Negatives and ...

A **secondary persona** is one who you would also like to please. But not at the expense of the primary. Minor adjustments to the design might be able to satisfy them.

A **negative persona** is one you decide is explicitly not a potential customer for your products, and therefore their opinions should be ignored.

You may decide that for this design Bob is negative, but you'll design another product for him later, with him as Primary.

Personas often interact with other people (who are not personas). These are walk-on parts, or bit players.



From Persona to Design

How do you take a Persona and use that to create Design?

Think **Dramatis Personæ**! We have characters, we need a **story**.

The story and the design will emerge together, lead by the Persona.

The initial story will be nothing more than an outline. As it becomes more detailed the design will emerge, which adds detail to the story, which adds to the design, which ...

By the end you have a matching **Scenario / Solution pair**.



Goals \Rightarrow Scenarios

What is the desired end state? (In other words the **goals**).

Keeping an **eye on the goal** at all times, how do we get from the initial state of things to the desired goal?

What has to change?

What must be done?

Here we write a simple story, which starts in a typical situation, and through **a few big steps** gets to the goal.

Try to take the most typical route from start to end - this will **inflect** the design towards being most efficient for the normal case.

Exceptions can afford to be a little more complex (normally).



Goals ⇒ Scenarios

We don't care about the technology yet.

At this point we should be most concerned about the way our Primary Persona **achieves their goal**.

Walk the persona through the scenario, considering what they are thinking about at each stage. What are they feeling? Are they confident? Nervous? What other factors might they be considering from outside the system?

At each stage of refinement, retest by walking the persona through the system.

These walkthroughs are ultra-high-speed user tests. Not as accurate as user tests, but they're quick and cheap so you can do lots.



inflect

|in 'flekt| |In , flɛkt| |ɪn , flɛkt|

verb [trans.] (often **be inflected**)

1 Grammar change the form of (a word) to express a particular grammatical function or attribute, typically tense, mood, person, number, case, and gender.

- [intrans.] (of a word or a language containing such words) undergo such change.

2 vary the intonation or pitch of (the voice), esp. to express mood or feeling.

- influence or color (music or writing) in tone or style.
- vary the pitch of (a musical note).

3 technical **bend or deflect** (something), esp. inward.

DERIVATIVES

inflective | -tiv | |In , flɛktɪv| adjective

ORIGIN late Middle English (sense 3) : from Latin *inflectere*, from *in-* 'into' + *flectere* 'to bend.'



Scenarios \Rightarrow Workflows \Rightarrow Tasks

A **scenario** is the broad brush-strokes. It outlines the way the problem is approached.

When we add our (imaginary) system, then it becomes more rigidly defined, and turns from a story into the basis for a **workflow**.

The technology and the story can now interact to some extent, each guiding the other.

The **information needs** of the Persona, at each stage through the workflow can also be determined.

Information might be necessary for the **task**, or it may be necessary to support the Persona - for example to reassure them all is well.



Tasks \Rightarrow Features!

Along the way the emerging scenario may indicate certain features (and capabilities) are needed in the system.

Many of these will emerge from the Task level (although capabilities emerge sooner).

So features are added only to support the scenarios. Any other features that may be suggested must in some way advance the Personas goals. If they don't they should be rejected.

Keep walking the persona through the system. At each level of refinement it will have something else to contribute.



Widgets, Layout, Style

Personas almost always include some statement about level of **technical expertise**.

This guides which widgets are used. For example - drag and drop is a problem for older users who often find the co-ordination of hold down the mouse button while dragging very hard.

Style should also match the Personas taste. What is the relationship between the user and the system provider?

Trust, Fashion, Brand - style affects all. How will the Persona perceive the system.



Communication with Personas

Once upon a time there was a caveman.

We've been telling stories since history began (and a bit before that).

Stories are so important that the brain actually deals with stories differently from other types of memory.

So to explain to someone why a particular design works - tell them a story.

Stories require characters: Personas!

By focussing on a Persona it's easier for those seeing your design for the first time to understand why you made specific design choices. When they (inevitably) ask how you would do some unsupported task your defence is asking why would the persona want to do that.



Questions

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