Using Personas Effectively

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ABSTRACT

Personas are a powerful design and communication tool to help all those involved in the creation of interactive systems to better focus their efforts on their users. A persona is a fictional character made to represent an archetypal user, and is best derived from field research. They help direct design, and clearly communicate that design to both to marketing and engineering teams.

General Terms

Design, Human Factors, Theory

Keywords

Interaction Design, Persona, Empathy, User Research

1. INTRODUCTION

While Personas have become a more popular tool over recent years they are widely misused, and this robs them of much of their utility.

While Personas can assist in communicating who the intended audience for a specific design is, the Persona alone is of limited use in the design process. Rather it is the process of their creation that is useful in design, because this forces the designer to improve their understanding of their users. The Persona then acts as a spur to remind the designer of those users as the design progresses.

For rapid, low budget projects doing a full-blown user research project may not be economically viable, so the designer is forced to use cheaper methods. In doing this it is important to understand what risks are being taken, and the possible impacts this can have on the quality of the final design.

But for larger projects, where the consequences of errors are more severe, failing to do detailed user research is dangerous, and Personas provide a useful way of summarising and communicating the results of that research. They also provide a way to keep those findings at the front of the designers mind all the way through the design process.

2. PERSONA CREATION

Ideally Personas are created from field research. For large, complex multi-role projects this may require ethnographic research. For typical commercial projects user interviews can

provide sufficient information. For small projects a client's own understanding of their users may be the only practical source of information.

Personas are not statistical in nature. It is not important that they represent the "average" user; in fact this is discouraged. Instead each Persona should represent a different kind of user. A typical project will have multiple Personas, and an important design question will be which of those Personas should the system support.

Personas must include goals. Goals can vary from very vague high level desires, such as "a good work-life balance" to the very specific such as "find how long my journey will take". It is the Personas goals that guide the overall structure of the design.

3. PERSONAS DURING DESIGN

Once User research is complete and Personas have been created the goals of those Personas can start to guide the selection of appropriate functions, information architecture, and flow through a product.

Rough scenarios, which walk the Persona through the emerging design help to test the design from the Personas perspective, keeping the design appropriate to the intended audience. This relies on triggering the designer's empathy for the Persona. This process can continue right through the process to the final complete fully detailed design.

4. POST DESIGN USE

Once a design is complete communicating that design to stakeholders also uses Personas. Explaining why certain design decisions were made is made easier if the context in which they will be used is clear. Personas can help support a narrative form of explanation, which elicits an empathic response, helping non-designers understand why the design solutions are appropriate. This can also be useful in communicating with design teams since it helps them appreciate that design decisions are grounded and reliable, not merely the whim of the designer.

5. TUTOR

Peter has substantial experience using personas. He worked for two years at Cooper, Alan Cooper's firm in Silicon Valley, which is credited with inventing the persona methodology. His research also includes persona methodology, specifically examining where the technique breaks down. He has also taught the technique on Lancaster University's MRes HCI course.

6. KEY LEARNING OUTCOMES

Delegates will complete the day knowing...

- How to collect relevant data for persona creation

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- How to create personas, either from user interview data or not
- How to use personas to generate and guide an evolving design
- How to use personas to manage client expectations and requirements
- Why personas work, and the limits of their utility

7. TUTORIAL SCHEDULE

7.1 Segment 1 (90 minutes):

7.1.1 Lecture: *Creating Personas*

What is a persona?

How to create personas

User research

Ethnographic research

User Interviews

Field Studies

Made up Personas (and risks)

Finding Users

Planning and Conducting User Interviews

Identifying Persona's goals

What information to include

Persona generation

Creative Writing

Dividing the workload (or not)

7.1.2 Lecture: *Using personas*

Why use Personas?

Self-referential design

Elastic users

Undefined problem

Using Personas

Primary persona

Secondary and negative personas, and walk-on roles

Persona to design

Goals to scenarios

Inflection

Scenarios, workflows, and tasks

Tasks to features

Widgets layout and style

Design Communication through Personas

7.2 Segment 2 (90 minutes):

7.2.1 Practical exercise: *User Research*

Delegates will see a demonstration of a user interview, and then carry out a number of user interviews themselves. The data from these interviews will then be collated and used to create a cast of Personas. These will be used in the afternoon session to inspire some design work.

Interviews will be carried out in groups of three, one subject, one interviewer and one recorder who will observe and take notes of salient details coming out of the interview.

Interviews will be kept short, 10-15 minutes, allowing each delegate to be in each role.

7.3 Segment 3 (90 minutes):

7.3.1 Practical exercise: *Persona Guided Design*

In this exercise a design will be derived from the personas.

After selecting a primary Persona, who will be the focus for the design work, delegates will be guided through a group to create scenarios that aim to address the primary persona's goals.

These scenarios will then be used to form a conceptual design of the system, and set of functions the system must support. The emerging design will be tested against the persona to ensure it is appropriate.

7.4 Segment 4 (90 minutes):

7.4.1 Lecture: *Persona Theory*

How do Personas work?

Empathy

How does empathy work

Empathic distance

Method Acting

When do Personas fail?

Persona Overload

Empathic over-stretch

Avoiding the problems

Solutions to Persona Overload

Solutions to reduce Empathic Distance

Persona Reuse - Risks

7.4.2 Discussion & Questions

The last 30 minutes of the day will be reserved for discussions arising out of the exercises, and delegate's specific questions about how the technique might be applied in their organisation.

Delegates are welcome to bring along Personas they have used in their own projects for discussion.