

Personas:

what they are and how they work

There are many strategies and approaches to increase the quality and consistency of design practice, but none more effective than the persona.

Personas have been in use since the mid-'90s and since then have gained widespread awareness within the design community

For every designer who uses personas, there are those who even more who strongly oppose the technique.

Personas can be viewed with disdain, seeing them as a silly distraction from the real work at hand — that is, until the design practice engages with the process and witness them being used properly and to their full potential.

Once understood why personas are valuable and how they could be put into action, the designer can make a start on using them in Goal Targeted design process.

1. Generate customer insight
2. Inform design processes
3. Test or validate assumptions
4. Uncover unknown or unexpected issues
5. Fix problems early when they are cheapest to resolve
6. Implement 80%-20% cost value- ratio at the projects' outset
7. Highlight unnecessary features
8. Achieve a greater fit between your product and customer
9. Identify unmet or emerging needs
10. Discover opportunities to innovate or improve the product
11. Provide objectivity and help resolve clashes of opinion
12. Improve end user experience
13. Commence the 'prototyping' of your design thinking

- humanise design focus
- form & test project scenarios
- aid design communication within a design team, clients & user groups
- enable user-centred design so that designers understand people (users + consumers)
- impactful and useful to others
- clarity, productivity and success in my own work
- supercharge your work, and take your designs to the next level.

What is a Persona?

- A persona is a way to model, summarise and communicate research about people who have been observed or researched in some way.
- A persona is depicted as a specific person but is not a real individual; rather, it is synthesized from observations of many people.
- Each persona represents a significant portion of people in the real world and **enables the designer to focus on a manageable and memorable cast of characters**, instead of focusing on thousands of individuals.
- Personas aid designers to create different designs for different kinds of people and to design for a specific somebody, rather than a generic everybody.
- A persona document should clearly communicate and summarize research data.



**Tom Brodie,
Shop Manager**

“Sometimes I’m so busy fighting alligators that I forget about draining the swamp.”

Tom has 8 years of experience in lube shop operations. He’s married with two young kids, and his wife jokes that the last time his hands were completely free of grease was on his honeymoon 5 years ago. At the shop he manages, Tom constantly puts out little fires. He works on the floor most of the day, trying to be everywhere at the same time although he prefers to act as greeter and cashier.

Most shop trends get measured on a monthly basis, since Tom has to meet sales targets defined by the owner, Eddie, in order to get his manager’s bonus. On a daily basis, Tom frequently monitors car counts, ticket average and employee productivity (especially individual service statistics). Sometimes his team needs a kick in the pants, but he tries to lead by example.


Tom’s Goals:

- **Keep the cars coming.** Tom has to rely on Eddie’s marketing efforts but car count is his make-or-break figure; he focuses on customer service to generate repeat customers.
- **Reduce labor percentages without sacrificing customer service.** Staffing is a tricky balance between keeping the shop’s labor costs down while ensuring employees get enough hours and bay times stay low.
- **Meet or exceed last year’s numbers for this month.** The Owner’s sales targets aim for year-on-year increases across the board, but in the current business climate Tom is happy simply meeting last year’s numbers.

What does a Persona look like?

While a persona is usually presented as a one-pager document, it is more than just a deliverable — it is a way to communicate and summarize research trends and patterns to others. This fundamental understanding of users is what's important, not the document itself.

EZ-Write primary persona: the main user type



Fred Fish: Corporate Chef

"Get me out of the office & into the kitchen."

Employer: Boise Controls
Background: Masters from Johnson & Wales University
Computer skills: Novice

Quick take on Fred	
Computer skills	Novice Expert
Job situation	Employee Director Manager Vice president
Computer type	Netbook Laptop Desktop
Computer tools	Advanced features Coding tools Email Web browsing Word processing
Background	Business Engineering Marketing Management Other: cooking

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Key goals
Fred doesn't get his hands dirty the way he used to (literally). He stops in at all six Boise Controls sites as often as possible to stay in touch with cooks and cooking.

He wants to learn computer tools, but not at the expense of managing his kitchens.

A day in the life
Once a month, he meets with the head chefs and to plan the menu. When they're done, he sends it to his staff and his manager.

He's not a computer whiz. On a good day, he can drag in some clip art and do some formatting with fonts. Once in awhile, he'll format menus with the new editor they on his MacBrook Pro.

He's figured out a lot, but not everything. He always had a problem sending a message without the attachment, or an attachment with no message. That's annoying and embarrassing and used to keep him away from computers.

The new EZ-Write system seems to have some features to help with that. Anytime he writes something like "...see the attached menu..." the program prompts him if he doesn't attach something. If there were a Nobel Prize for software, he'd nominate the people who designed this.

Chefs are different from other users
Computers are just tools for a chef. Fred would rather use a cutting board than a keyboard.

The main elements presented here are the key goals and the "Day in the Life," which are common to all well-made persona documents. Other elements, such as the "Quick Take on Fred" are included because of team and/or project requirements. Each project will dictate a certain approach to producing persona documents.

I emphasize this distinction because many people think of a persona and the document that captures essential elements of the persona as the same thing — they are not. It is all too easy for novice practitioners of goal-directed design to fixate on the "best way" to make a persona document and to lose sight of the bigger picture, which is to fully understand a user and then simply share the top-level information with others.

For designers looking for a jump start on creating persona documents, I highly recommend the [persona poster template](#) by Creative Companion. This poster organizes and formats all of the important information that a designer would need to create an amazing one-page deliverable.

NAME

Use a realistic name. Don't use names of colleagues.

DESCRIPTOR

What type of persona is it. Describe the most prominent differentiator.

QUOTE

Capture the essence to one or two points that could come out of the persona's own mouth - so to speak.



WHO IS IT ?

Sketch the personal profile, age, location, job title, what kind of person is it? Think about one or more personas from segmentation.



WHAT GOALS?

What is the supreme motivator? What are (latent) needs and desires?



WHAT ATTITUDE?

What is the point of view? What is the expectation, perception of the service, company or brand. What motivates the persona to go to the website, into the shop, or use the service.



WHICH BEHAVIOUR?

What does she do? Tell stories about her behaviour while using a service, product or site. Channel usage for various needs (internet, visiting comparable sites, mobile, social media). What works well, what are the frustrations, what is stopping her from choosing a function, service or product?

Which Trends, mindstyles or other indicators are applicable for this persona?

How important are functional, emotional, expressive benefits.

Fast or slow decision maker?
Why, how can you tell?

Decisions made on facts or emotion?
Why, how can you tell?



EDUCATED GUESS

ASPIRATIONAL

ASPIRATIONAL

ACTUAL

ACTUAL

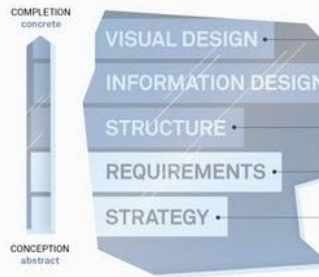
USER CENTRED DESIGN

“THE CENTRAL PREMISE OF USER CENTRED DESIGN IS THAT THE BEST DESIGNED PRODUCTS AND SERVICES RESULT FROM UNDERSTANDING THE NEEDS OF THE PEOPLE WHO WILL USE THEM.” — Design Council

Good design is more than meets the eye. The visual part of a design – the look and feel – is only the tip of the iceberg. Beneath the surface lies the foundation of a successful design: a user centred design process. It is a development cycle which takes into consideration what users really need and makes adjustments by exploring, testing and tuning the design until these needs are satisfied. The result of this is a high level of usability: the design is effective, efficient, engaging and easy to learn. The process can be applied to all design practices that have the aim to provide a good user experience. This includes web design, interface design, product design, editorial design, urban design, wayfinding, service design and architecture.

There are a variety of tools, techniques and methods at each stage of the process which are used to progress the design. Some of them are explained here. The product's probability of success is greatly increased by understanding and using these techniques.

Find out what's below the surface of a cool design



VISUAL DESIGN • The visual treatment of graphic elements, the look and feel of the product
typography, colour palette, alignment, texture, tactile quality of materials

INFORMATION DESIGN • Designing the presentation of information to facilitate understanding
navigation, table of contents, indices, visual hierarchy

STRUCTURE • Structural design of the information space to facilitate intuitive access to content
information architecture, interaction design, wireframe, progressive disclosure

REQUIREMENTS • Definition of scope, user needs, content and information requirements, functional specifications
personas, accessibility, feature set, ethnographic research, differentiation, purpose

STRATEGY • Planning out the objectives and goals of the project, specifying organisational requirements
project space, project schedule, selecting methods and techniques, briefing

ANALYSIS AND PLANNING

LAUNCH

IMPLEMENTATION

CONCEPT

EVALUATION

The user centred design process is an iterative cycle where every step is evaluated against the initially identified requirements of the users and iterated until these requirements are met. Evaluation methods include:

- PERSONAS & SCENARIOS
- ROLE PLAY
- USER TESTING
- ACCESSIBILITY TESTING
- FOCUS GROUP
- OBSERVATION

DESIGN

METHODS AND TECHNIQUES

STICKY NOTES

Comparing notes is a useful tool to aid decision making. Ideas are written down on individual sticky notes, weighed against one another and organised according to priority or other criteria (speed, cost, quality, desirability etc). This technique can also be used with users to get them to put their considerations in order of importance.

PROJECT SPACE

A dedicated project area where research and visualisations can be organised spatially on walls provides a creative work environment where meetings can be held surrounded by stimuli. Constructing a story about the project in the space providing roughs and unpolished design invites others to comment and contribute.

GOOD PRACTICE GUIDELINES

It is important to consider good practice guidelines relevant to the project in order to address broad user requirements and meet accessibility standards. For example RNIB legibility guidelines, WC validation, ISO standards, British Standards of ergonomic principles.

AESTHETICS

Visual design impacts greatly on the usability of a product. Users prefer a beautiful look & feel over an ugly or dull one. Aesthetic designs are perceived as easier to use, whether they are or not. Good designers find a perfect combination of accessibility and aesthetics.

PROTOTYPING

Prototypes are simple, incomplete models that can be used to evaluate responses to form (look-like prototype) or aspects of build and functionality (works-like prototype) of a product. They typically evolve from concept sketches or wireframes to low and high-fidelity models as they progress through the development cycle.

METHODS AND TECHNIQUES

USER REQUIREMENTS

It is vital to use all available resources to gather information about the users' requirements. Successful projects use an average of five different sources of information. These may be focus groups, contextual or individual interviews, observation, surveys, etc.

PERSONAS AND SCENARIOS

A persona is an archetype comprised of habits and characteristics of the target audience. Scenarios are little stories describing how typical user tasks are carried out. They help to anticipate and identify the decisions a user will have to make at each step in their experience and through each environment or system state they will encounter.

PROGRESSIVE DISCLOSURE

Managing the information complexity or cognitive load by displaying only relevant information at any given time prevents information overload. For example through effective signposting of destinations in a wayfinding system or using "read more" links on a website.

USABILITY TESTING

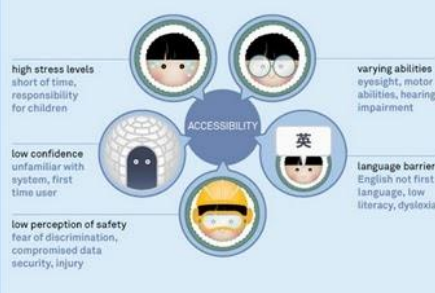
Evaluating a product by testing it with representative users helps to identify usability problems by collecting quantitative data on the users' performance (e.g. error rate) and establishing their satisfaction with the product.

RAPID VISUALISATION

Visualising ideas and concepts rapidly using pen and paper is helpful to communicate them to the team and to test ideas quickly without investing time and resources into polished design. Rough and unpolished looking sketches, wireframes and storyboards encourage constructive feedback and stimulate discussion.

USER CAPABILITIES

Users have different requirements depending on their situation and capabilities. Catering for these needs and enabling access to the product or system for as many people as possible is the aim of inclusive design.



USER GOALS

Users' needs depend on what they are trying to achieve when they use the product. These user goals inform the information requirements that need to be addressed in order to achieve a high level of usability.



USER INVOLVEMENT

The most successful results are achieved when the user is involved in every step of the design process either through direct feedback, user testing, observation or informed evaluation using previously gathered information.



Where does the Concept of Personas come from?

Understanding the historical context and what personas meant to their progenitor will help us understand what personas can mean to us designers. Personas were informally developed by Alan Cooper in the early '80s as a way to empathize with and internalize the mindset of people who would eventually use the product he was designing.

Alan Cooper interviewed several people among the intended audience of a project he was working on and got to know them so well that he pretended to be them as a way of brainstorming and evaluating ideas from their perspective. This method-acting technique allowed Cooper to put users front and centre in the design process as he created product. As Cooper moved from creating product himself to consulting, he quickly discovered that, to be successful, he needed a way to help clients see the world from his perspective, which was informed directly by a sample set of intended users.

This need to inform and persuade clients led him to formalize personas into a concrete deliverable that communicates one's user-centred knowledge to those who did not do the research themselves. The process of developing personas and the way in which they are used today have evolved since then, but the premise remains the same: Deeply understanding users is fundamental to creating exceptional product.



Personas are an essential part of goal-directed design. Each group of users researched is represented by a persona, which in turn is represented by a document. Several personas are not uncommon in a typical project.

How Do Personas Fit In The Design Process?

Since its humble origin, Alan Cooper's design methodology has evolved into a subset of user-centred design, which he has branded goal-directed design. Goal-directed design combines new and old methodologies from ethnography, market research and strategic planning, among other fields, in a way to simultaneously address business needs, technological requirements (and limitations) and user goals. Personas are a core component of goal-directed design. I have found that understanding the fundamentals of this goal-directed approach to design first will help the designer understand and properly use personas.

Personas are easy to understand conceptually, mastering their use with finesse and precision would take me many months.

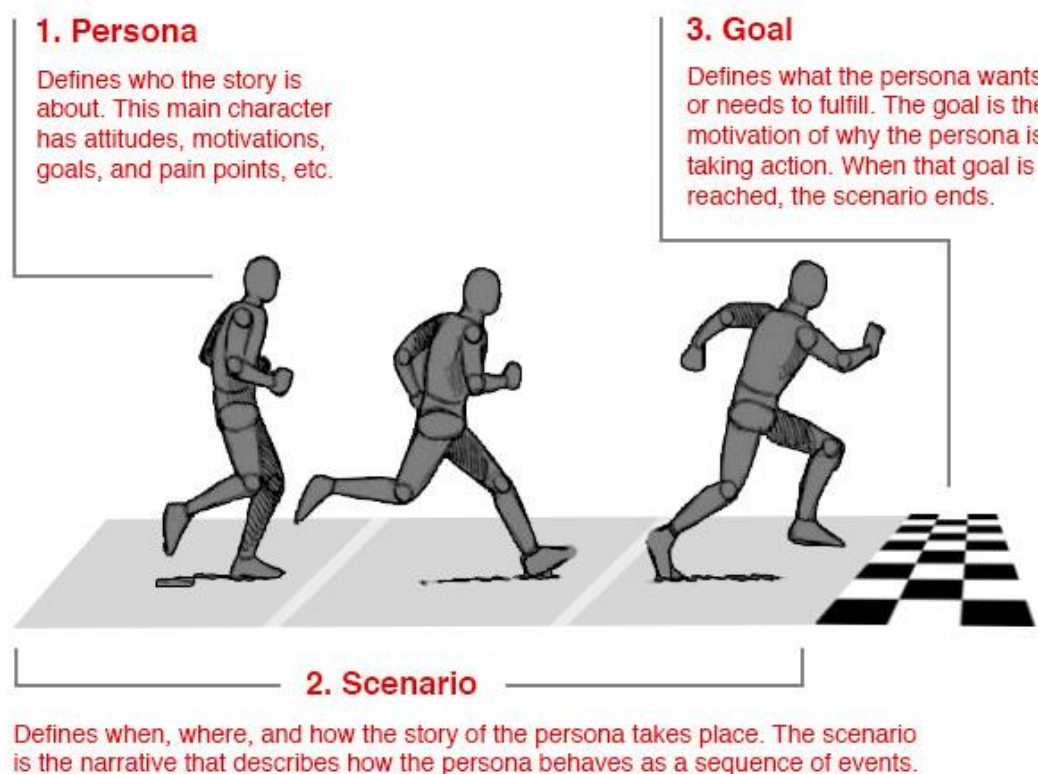
The design team (and even the clients) are seen to be referring to personas by name in almost every discussion, critique and work session.

Personas are not simply just created and then forgotten — they are living, breathing characters that permeate all activities and stages of the design process.

Personas are an essential part of what constitutes the goal-directed process. I learned that personas, though important, are never used in isolation, but rather are implemented in conjunction with other processes, concepts and methods that support and augment their use.

Component of goal-directed design that support personas

- **End goal(s)**
This is an objective that a persona wants or needs to fulfil by using product. The product would aid the persona to accomplish their end goal(s) by enabling them to accomplish their tasks via certain features.
- **Scenario(s)**
This is a narrative that describes how a persona would interact with product in a particular context to achieve their end goal(s). Scenarios are written from the persona's perspective, at a high level, and articulate use cases that will likely happen in the future.



The three parts of goal-directed design are most effective when used together. For instance, in order for a sprinter to reach their potential, they need a place to run and a finish line to cross. Without a scenario or end goal, the sprinter would have nothing to do or strive for.

Personas, end goals and scenarios relate to one another in the same way that the main character in a novel or movie goes on a journey to accomplish an objective. The classic “hero’s journey” narrative device and its accompanying constructs have been appropriated for the purpose of designing better product.

How are personas created?

Personas can be created in a myriad of ways, but designers are recommended to follow this general formula:

1. Interview (Primary Research) and/or observe an adequate number of people.
2. Use secondary sources to supplement this primary research
3. Find patterns in the interviewees' responses and actions, and use those to group similar people together.
4. Create archetypical models of those groups, based on the patterns found.
5. Drawing from that understanding of users and the model of that understanding, create user-centred designs.
6. Share those models with other team members and stakeholders.

Step-by-step instructions on how to create a persona is beyond the scope of this article, but we'll cover this in the second article in this series.

What are personas used for?

Personas can and should be used throughout the creative process, and they can be used by all members of the product development and design team and even by the entire company. Here are some of the uses they can be put to:

- **Build empathy**
When a designer creates a persona, they are crafting the lens through which they will see the world. With those glasses on, it is possible to gain a perspective similar to the user's. From this vantage point, when a designer makes a decision, they do so having internalized the persona's goals, needs and wants.
- **Develop focus**
Personas help us to define who the product is being created for and who not to focus on. Having a clear target is important. For projects with more than one user type, a list of personas will help you to prioritize which users are more important than others. Simply defining who your users are makes it more apparent that you can't design for everyone, or at least not for everyone at once — or else you risk designing for no one. This will help you to avoid the "elastic user," which is one body that morphs as the designer's perspective changes.
- **Communicate and form consensus**
More often than not, designers work on multidisciplinary teams with people with vastly different expertise, knowledge, experience and perspectives. As a deliverable, the personas document helps to communicate research findings to people who were not able to be a part of the interviews with users. Establishing a medium for shared knowledge brings all members of a team on the same page. When all members share the same understanding of their users, then building consensus on important issues becomes that much easier as well.
- **Make and defend decisions**
Just as personas help to prioritize who to design for, they also help to determine what to design for them. When you see the world from your user's perspective, then determining what is useful and what is an edge case becomes a lot easier. When a design choice is brought into question, defending it based on real data and research on users (as represented by a persona) is the best way to show others the logical and user-focused reasoning behind the decision.
- **Measure effectiveness**
Personas can be stand-in proxies for users when the budget or time does not allow for an iterative process. Various implementations of a design can be "tested" by pairing a persona with a scenario, similar to how we test designs with real users. If someone who is play-acting a persona cannot figure out how to use a feature or gets frustrated, then the users they represent will probably have a difficult time as well.

Are Personas Effective?

If you still aren't convinced that personas are useful, you are not alone. Many prominent and outspoken members of the design community feel that personas are not to be used. They make compelling arguments, but they all rule out the use of personas entirely, which I feel is much too strong. (A nuanced analysis of their anti-persona perspectives is beyond the scope of this article but is definitely worth further reading. Links to writings about these perspectives can be found in the section at the end of this handout.)

Like any other tool in the designer's belt, personas are extremely powerful in the right time and place, while other times are simply not warranted; the trick is knowing when to use which tool and then using it effectively.

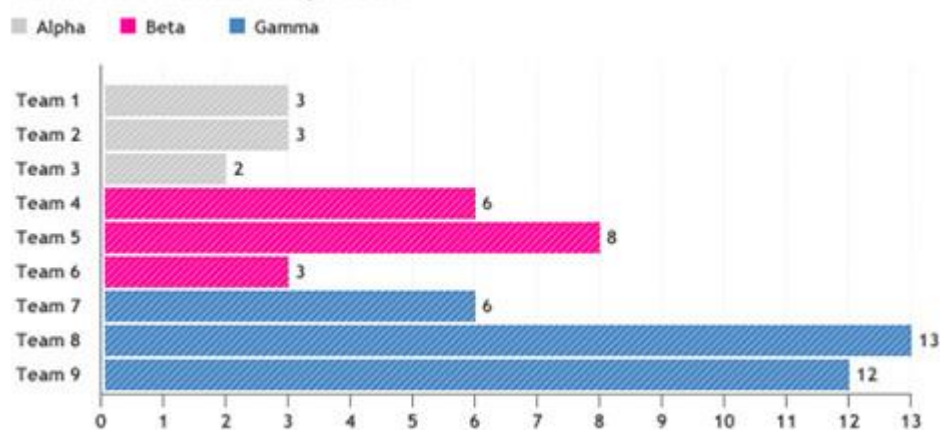
Any tool can be used for good or evil, and personas are no different.

If used improperly, as when personas are not based on research (with the exception of provisional personas, which are based on anecdotal, second-hand information or which are used as a precursor or supplement to first-hand research), or if made up of fluffy information that is not pertinent to the design problem at hand, or if based solely on market research (as opposed to ethnographic research), then personas will impart an inaccurate understanding of users and provide a false sense of security in the user-centred design process.

There are two rigorous academic studies on the effectiveness of personas which have been conducted: the first by Christopher N. Chapman in 2008, and the second by Frank Long in 2009. Though small, both concluded that using personas as part of the design process aided in producing higher-quality and more successful designs.

These studies join a growing body of peer-reviewed work that supports the use of personas, including studies by Kim Goodwin, Jeff Patton, David Hussman and even Donald Norman. The anecdotal evidence from these and many other writers has shown how personas can have a profoundly positive impact on the design process.

Total Heuristic Score by Team



An excerpt from Frank Long's study of the effectiveness of personas. Designs created by students who used personas and scenarios (pink and blue) scored higher than the designs of those who used neither (gray) in a type of usability test called a heuristic analysis.

How and why do personas work?

Personas are effective because they leverage and stimulate several innate human abilities:

- **Narrative practice**
This is the ability to create, share and hear stories.
- **Long-term memory**
This is the ability to acquire and maintain memories of the past (wisdom) from our own life experiences, which can be brought to bear on problems that other people face.
- **Concrete thinking**
This is the tendency for people to better relate to and remember tangible examples, rather than abstractions.
- **Theory of mind (folk psychology)**
This is the ability to predict another person's behaviour by understanding their mental state.
- **Empathy**
This is the ability to understand, relate to and even share the feelings of other specific people.
- **Experience-taking**
This is the ability to have the "emotions, thoughts, beliefs and internal responses" of a fictional character when reading or watching a story.

Personas, goals and scenarios tap into our humanity because they anthropomorphize research findings. When hundreds or even thousands of users are represented by a persona, imagining what they would do is a lot easier than pouring over cold, hard, abstract data. By using personas, goals and personas together in what Cooper calls a "harmonious whole," one is able to work in a more mindful way, keeping the user at the heart of everything one does.

If a designer truly understands and internalizes the user and their needs and how they could potentially fulfill those needs, then seeing potential solutions in the mind's eye becomes much easier; rich and vivid ideas from the user's perspective seem to percolate to the top of mind more rapidly and frequently. These ideas are more likely to turn into a successful design than by using other methods because the designer has adopted the user's filter or frame as their own.

This potent combination of personas, goals and scenarios help the designer to avoid thinking in the abstract and to focus on how product could be used in an idealized yet more concrete and humanistic future.

Do you really need to use personas?

To determine whether personas would be appropriate, a designer must first step back and determine who they are designing for. Determining the audience for a design is deceptively simple, yet many people never think to take the time to explicitly figure this out.

The fundamental premise of user-centred design is that as knowledge of the user increases, so too does the likelihood of creating an effective design for them. If a designer designs for themselves, then they wouldn't need to use personas because they are the user — they would simply create what they need or want.

Designers do design for themselves from time to time, but professionally most design for others. If they are doing it for others, then they could be designing for only two possible kinds of people: those who are like them and those who are not like them. If they are designing for people like them, then they could probably get away without personas, although personas might help. Usually, though, **designers design for people unlike themselves**, in which case getting to know as much as possible about the users by using personas is recommended.

***Treat different people differently.
Anything else is a compromise.
– Seth Godin***

Personas help to prevent self-referential thinking, whereby a designer designs as if they are making the product only for themselves, when in fact the audience is quite unlike them. This is how most designers actually work: according to what they like or think is the right way to do things. Even a seasoned designer can go only so far on intuition. This is one of the biggest mistakes one can make when designing product (or anything else, for that matter).

Three Important Benefits of Personas

Next time you have a chance to watch someone reading a map, look for the first thing they do. They'll likely do the exact same thing everyone else does: find themselves on the map. It doesn't matter what kind of map it is, whether it's of their neighbourhood or an amusement park. They'll open the map and find something that is personally meaningful, such as their house or their favourite roller coaster.

Psychologists call this 'grounding'—the natural behaviour of initially finding a known reference point in a foreign information space. Once the person has grounded themselves, they can then use the starting point to understand the rest of the space.

While grounding helps people adjust to complex situations, it can be detrimental when it happens during the design process. If, while conjuring up an interface, designers ground themselves in the design, they run the serious risk of creating an interface that only they can use.

Separating You from Your Work

Creating an interface for yourself is great if you're going to be the only user. When we decide how we'll arrange our kitchen cabinets—where the plates, glasses, pots, and pans will go—we want to put ourselves into the design. But, we don't expect other people to wander into our kitchen and start grabbing things without help.

When we're creating online interfaces, it's a whole different story. Here we're designing for others, not for ourselves. We may know too much about the layout and structure. We'll understand the relationships between various design elements ("That button is only used with this dropdown"). We are very familiar with the jargon and business rules.

Therefore, when a designer grounds themselves in their own design, they run the risk of designing an interface that only they can use. Any tools that help designers prevent the natural behaviour of grounding helps them attack the design more objectively, with their target user in mind.

1: Preventing Grounding with Personas

We recently had the opportunity to talk with several design teams currently using personas to help create their designs. We discovered, while studying how they integrated their personas into their design work, one major benefit was to prevent grounding.

Personas are model users that the team creates to help understand the goals, motivations, and behaviours of the people who will use the interface. The persona represents behaviour patterns, helping the designer understand the flow of the user's day and how the interface will fit into it.

The teams we interviewed used personas as a way to avoid the grounding problem. Instead of asking, "How would I use this system?" they asked, "How would Mary use the system?" They found their persona's (Mary) initial reference point instead of their own, making judgments about the design from the persona's point of view.

Understanding Retirement

One team in our study was working on an investment tool, primarily used by retirees. The team, who consisted of primarily 20-somethings, naturally assumed that, when they retire, they would have simple investment and financial needs. As a result, they created the initial design for simple transactions.

Their subsequent field research produced a persona named Ron, an active 76-year-old who had nine sources of income, three mortgages, and needed to write 21 checks every month from his multiple accounts. In the field, the team had seen many people similar to Ron and their transactions were anything but simple.

As soon as the team looked at their design from Ron's perspective, they realized that their simple transaction approach was going to complicate his life immensely. Putting Ron into the design, instead of themselves, made them realize that they needed to take a different approach.

It turns out that preventing grounding wasn't the only major benefit of personas we discovered during our research. Two others jumped out at us as well.

2: The Oral Tradition Lives On

As we studied teams who made substantial use of personas, we noticed that the personas were talked about frequently, almost in mythical terms. The team members had made up lives for these people, usually based on the actual observations they made when they studied real users. They constantly used these imaginary lives to relate important stories about how these users would interact with the proposed designs.

Storytelling is an age-old tradition. Long before the written word, humans have used stories to teach their children values and prepare people for the world ahead.

This tradition hasn't gone away. A few years ago, Xerox Corporation set about studying how field repair technicians learned to effectively deal with infrequent, yet complex problems. The researchers originally assumed that it was a mix of training and mentoring that played the biggest role.

They were shocked to discover that those technicians who were best prepared for the craziest problems didn't learn how to solve them in a classroom or by tagging along with a more senior technician.

Instead, they learned that the war stories exchanged when the technicians got together were the biggest contributors to their education. In these informal get-togethers, technicians would brag about their accomplishments and try and shock their peers with stories of woe and wonder. It was in the details of the stories that the field technicians attributed their best education.

Communicating Details in a Meaningful Way

The teams we researched did the same thing. They got together and told stories about how their personas would tackle some problem. In the details of these stories, team members would start to get a real sense of who these users were and the problems they might encounter.

Using just the oral tradition, the stories become distorted with every new telling. Many of the teams prevented this distortion by capturing the stories along with the persona descriptions. (One team went so far as to create a screensaver that would randomly display

the pictures, backgrounds, and stories of each persona on the development team's machines when they were idle.)

3: The Role Personas Play in Role Playing

Along with preventing grounding and encouraging storytelling, we found personas had a third benefit to the teams we studied: enhancing role playing.

From an early age, we use role playing as a way to safely explore the world around us. By pretending to be different people, we can try things out from their perspective, seeing if their viewpoint is different from our own.

Role playing has long been a part of design processes. For example, in the '80s, designers at Apple used comic strips and play acting to think through the lives of their users and how they would integrate a variety of products, real and imaginary, into those users' lives.

One design team we studied, who was in charge of a major electronic retailer's e-commerce site, had an analyst role play each of four personas, walking through the site as each character. For example, one persona was a mom who wanted to buy educational product and technology for her children. She wasn't a technical wiz, but wasn't completely ignorant of the technology either.

The analyst adopted her role to play the shopper on the site. From that perspective, the analyst identified several issues with the design of the site that hadn't been discussed previously. As the analyst adopted the other three personas, different issues surfaced. (Interestingly, we were independently doing a usability study on the site simultaneously and discovered many of the same issues as the analyst found from the four personas.)

When we adopt a role, we can start to view the world around us from that person's perspective. Using the persona as the target role, we can identify how that person will interact with the design and the issues that will arise. We start to see things we can't see any other way.

Taking Full Advantage

Personas don't automatically get the benefits of preventing grounding, encouraging storytelling, and enhancing role playing. They have to be carefully crafted to get those benefits.

To get the benefits, the personas have to have rich, relevant detail. They need to accurately represent the users the team is aiming for. And they need to have a solid foundation in the experiences of real users to be believable and meaningful.

Our research into the usage of personas has taught us that the most successful teams are those that are constantly feeding their persona information. They conduct frequent field studies to understand who the users are and what goals and motivations they have. The teams regularly use usability testing to expand their knowledge of their users. They think of their persona documents as living descriptions—constantly changing as they learn new things from their ongoing research, studies, and design exercises.

Personas are becoming a regular staple in many of the development teams we talk to. The method helps teams make a smooth transition between requirements and design, resulting with much cleaner designs. The benefits of preventing grounding, encouraging storytelling, and enhancing role playing are rarely discussed, yet very present when you see the method in full force. It's these benefits that guide our belief that personas will be a trusted method for many years to come.

Summary

As human beings, designers are all biased and can only see the world through their own eyes — however, they can keep that in mind when designing from now on. Designers must strive to the best of their ability to keep their biases and, dare I say, egos in check.

Designers don't always know what is best — but sometimes users do and that is what personas are for: to stand up and represent real users, since real users can't be there when the design process takes place. In your next project, there will come a time when you must decide what is in your user's best interest. Just like in the movies, picture a devil and angel on your shoulders, where the devil tries to coax you to design something that pleases only your own sensibilities, and the angel is the persona who cries out in defence of their own needs. Who will you listen to?

Granted, not even the most disciplined user-centred and goal-directed designer can be completely unbiased. As professionals, we all use our best judgment to make decisions (based on knowledge of the field, knowledge of competitive markets and work experience), but **some people's perspective is more self-centred than others**. Personas help to keep a designer honest and to become mindful of when they are truly designing for others and when they are just designing for themselves. If you are going to design for someone unlike yourself, then do your users a solid and use a persona.