

Introduction to User Personas



From all over the techniques and tools related to design process and User experience, only personas appear as a consistent common denominator, even in methods against the use of extensive “deliverables” as Lean UX. Most of the point of view agree in that the secret of a great user experiences strategy lies on this tool, even so the building process varies significantly.

Probably **the most important reason to create personas is to set a common understand of the final user.** So that a coherent strategy is defined that will result in a product/service that is user oriented and meet the user goals.

This post and the further related ones, came from a personal work aimed to define a guideline for the creation of personas in daily work. Actually the state of art about personas is so extensive, so vast that this post doesn't pretend to say anything is not already out there, but I think you may find this structure and easy starting point.

In this first part I will make a general approach, we will see what is the starting point and the basic methodology and what are the main elements that are typically included in user personas. Later I will create different posts focused on the most critical and complex variables.

“Personas are archetypes built to identify our real users profile, needs, wants and expectations in order to design best possible experience for them”.

One starting points:

Remember User Personas is a design tool. As a tool is used for answers key questions that are made to drive design: ***What would (persona name) do in this moment? What would he need now? Do (persona name) understand this?***

The purpose is to put all stakeholders in to the user's shoes (PO, PM, Developers, Designers, etc).

Origins of User Personas

Seems to be personas origins came from marketing field, as a tool designed by Angus Jenkinson to categorize customer segments beyond the traditional segmentation based on demographic and with the purpose to achieve a higher level of knowledge about customers daily life, needs and desires, he named this tool "Customer Prints" (Check Jenkinson , A . (1993-1994) '[Beyond segmentation](#)'). Recommend you to read Jenkinson paper, include some interesting framework about the evolution of customer from a "class or 'clan' society to an individually created society", and the switch from traditional segmentation into grouping ("people who share common characteristics" as an appropriate response to this change. At the same time, you could see how these principles are definitely the base of modern "personas", as a bottom up approach, people based and requirement driven.

Parallel to Jenkinson work, Alan Cooper, creator of the [Goal Directed Design](#) was working in a similar concept he names "User personas" and fully describe in his book "The Inmates Are Running the Asylum". Personas are described as hypothetical archetypes of actual users, and are defined by their goals, as their goals are defined itself by the personas. The methodology introduced by Cooper starts with the investigation of the problem domain. And some of the guidelines described are:

- Design for just one persona, and you will have greater success (The Primary persona, we could have more than one).
- Using "the user" as a design tool is a mistake. The expression is to brad and this vagueness causes many design failures. Hi name this issue the "elastic user" and the solution to this vagueness is the specification Personas represent.

When Donald Norman joined Apple in 1993, the team leading by Joy Mountford were already using something like personas. Personas is the primary tool for the [User Centred Design](#) approach defined by Donald Norman and dominant design process used today for Software

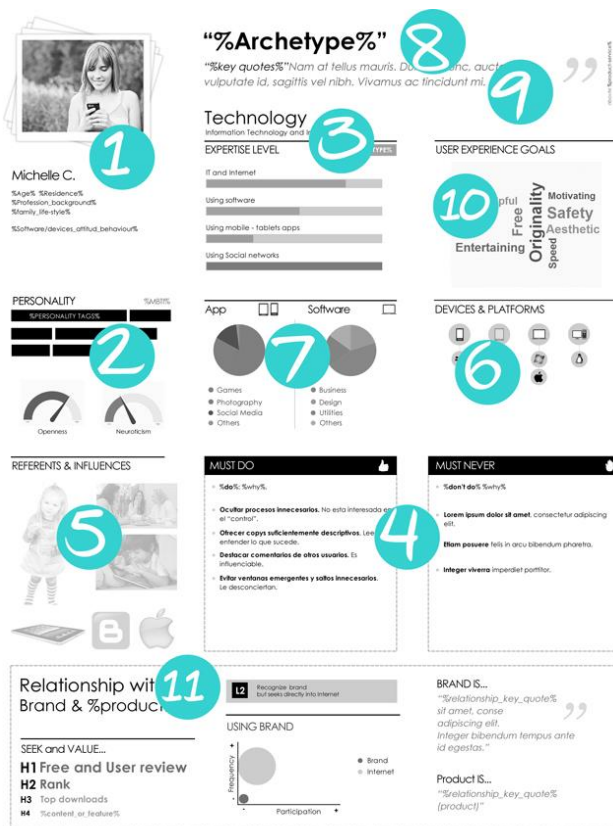
development. In UCD process the User Personas are built based in different techniques as exhaustive observation and interviews.

Common points across all user personas methods:

- **Personas are 'fictional' characters.** Even so, they are created based on real data and research around a problem domain, or a focus target.
In UCD the personas are created based in a previous research, but in Lean UX methods for example, personas are created originally based on assumptions (proto-personas) in a brainstorming session with the team, and further checked against actual real data (See Gothelf, Jeff. Lean UX. Applying Lean Principles to Improve User Experience. 2013).
- A product should have the **minimum number of personas**, so we focus design and this may guarantee better success.
- Personas must answer three basic questions: **what are the user needs, wants and limitations.**
- In User Personas **is more important to be precise than accurate.** This means they must be strongly consistent to itself so they don't crush during the development process ("It matters more that the persona is expressed with sufficient precision that it cannot wiggle under the pressure of development than it does that it be the right one").

Main elements of a Persona:

If you make a quick search at google you could see million different layouts, at the moment to create my guideline I went through many of them and as result I resume some main elements I saw in common, listed below.



UX lady
user experience and more

User Persona Basic Layout
ux-lady.com

1. **Profile** area: Where basic demographic, geographic and psychographic information are included, like age, residence country or social class.
2. **Personality** elements: This is the more inconsistent between all the personas layout I have seen. Personality is a very complex variable and in most cases I only saw a vague collection of qualifying adjectives. I do extensive research here and I have come across a technique that allows you to give a more or less consistent categorization, based on the Myers-Briggs (MBTI) type indicators and the 5Factor Model (I will describe in detail in another post).
3. **Expertise**: Area that describes character expertise in relation to the domain (normally computers and internet proficiency level). I use here different variables depending on the product-focus.
4. **Must Does / Must Never**: This area is probably one of the most actionable. Resume what they expect and want (must do) and what frustrates him and annoys (must never).

5. **Referents & Influences:** Represent People, brands and product that influence his relation with internet, computers and other devices, software and app, etc. (This could change depending on the product/service domain)
6. **Devices & Platforms:** This module reflect devices and platforms with which the persona are familiar. (This could change depending on the product/service domain)
7. **Used product/service** related with the domain. Depending on the domain of the product/service could be for example: software/apps.
8. **Archetype:** This is a short denomination for the persona, that pretend resume them in a few words. Sometime refers to personality characteristics, others define a relationship with the product-service.
9. **Key Quotes:** simulate a Persona comment. Pretends reflect behaviour or persona attitude as user
10. **Experience Goals:** What are the users' expectations and priorities when interact with the product/service or about the goal pursued?
11. **Brand-Relationship.** Persona relationship with the specific brand and the product.
12. **Picture:** The final touch for your persona will be a person picture that illustrate the personality and lifestyle your persona has.
13. **User type:** I used as a quick categorization of user expertise using a four level scale.

Methodology for gathering each point:

A key point for successful personas and the most extensive work I made was trying to describe a methodology for fill-in each one of the persona elements, following a common method so they could be created for different products without inconsistencies.

How we define Personality? How we measure expertise?...

Finally, let's see how all this element are presented in a persona layout:



Michelle C.

%Age% %Residence%
%Profession_background%
%family_life-style%
%Software/devices_attitud_behaviour%

PERSONALITY



REFERENTS & INFLUENCES



"%Archetype%"

"%key quotes%"*Nam at tellus mauris. Duis nisi nunc, auctor non vulputate id, sagittis vel nibh. Vivamus ac tincidunt mi.*

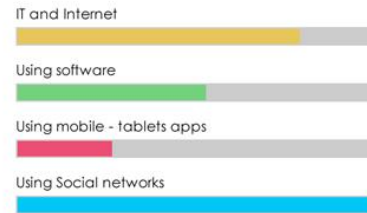


about:Product-services

Technology

Information Technology and Internet

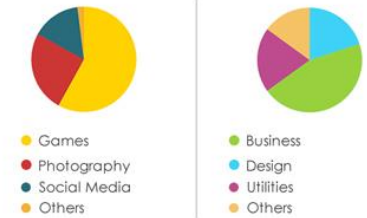
EXPERTISE LEVEL ▶ %USER TYPE%



USER EXPERIENCE GOALS



App Software



DEVICES & PLATFORMS



MUST DO

- %do%: %why%.
- **Hide unnecessary processes.** Not interested in having the "control".
- **Lorem ipsum dolor sit amet,** consectetur adipiscing elit.
- **Lorem ipsum dolor sit amet,** consectetur adipiscing elit.
- **Lorem ipsum dolor sit amet,** consectetur adipiscing elit.

MUST NEVER

- **%don't do% %why%.**
- **Lorem ipsum dolor sit amet,** consectetur adipiscing elit.
- **Eliam posuere** felis in arcu bibendum pharetra.
- **Integer viverra** imperdiet portitor.

Relationship with Brand & %product%

SEEK and VALUE...

H1 %content_or_feature%
H2 Rank
H3 Top downloads
H4 %content_or_feature%

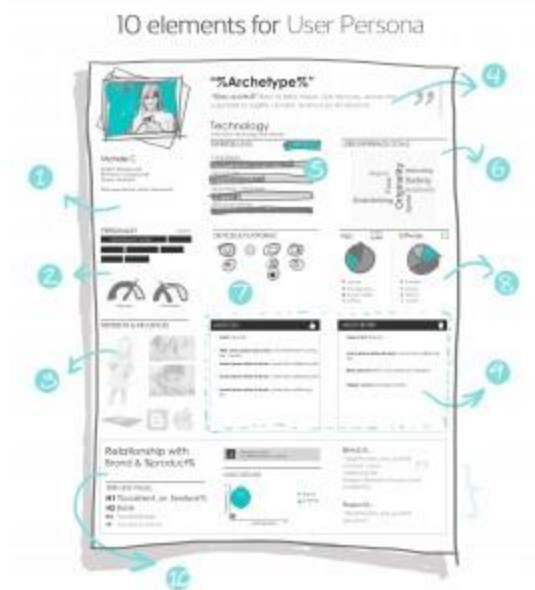
L2 Recognize brand but seeks directly into Internet

USING BRAND

BRAND IS...
"%relationship_key_quote%
sit amet, conse adipiscing elit.
Integer bibendum tempus ante id egestas."

Product IS...
"%relationship_key_quote%
(product)"

DIY User Personas



Probably you already know what a persona is -, and probably you, like me, **build your first persona using some of the thousands personas layout you can find in the internet.** But as has happened to me **you've probably also discovered this is not easy work...**

But you know, I love recipes, so **here you have my own recipe to build user personas, step by step** including 10 elements your persona should have.

I create this guideline with the purpose to **make the process of create personas a simple *fill in the blank work***, so I think could be useful for you too. Let me know!

The guideline it is structured in 3 points:

- A. **How to**, with the step by step guide and the Interviews process.
- B. **Layout**, presenting the persona layout I use with 10 basic elements.
- C. **Elements** were I describe in details each one of the elements of the layout and the method used to obtain the information and measuring.

Each point follows a *What? Why? and How?* logic to make it even easier.

1. HOW TO

1.1 Step by step (Modelling personas)

What?:

“The personas are archetypes built after a preceding exhaustive observation of the potential users” (UCD method)

A persona should include:

- Social and demographic characteristics.
- Needs, desires, goals
- Habits (consumer habits, behaviour)
- Expertise
- Cultural background
- Motivations
- Must do, must never
- User experience goals

Why?

Any product should have personas! It is the most basic tool for design experience. **Key to identify our real users profile, needs, wants, expectations** and end up with a product/service user-oriented.

How?

One persona is build based on several sources information: interviews with real users, analytics, marketing, customer care, etc. **Bellow you have a suggested step by step path for build your persona.** Recently reading Lean UX method discover and alternative path to traditional User Centred building personas method, but here I will explain only the method based on traditional UCD.

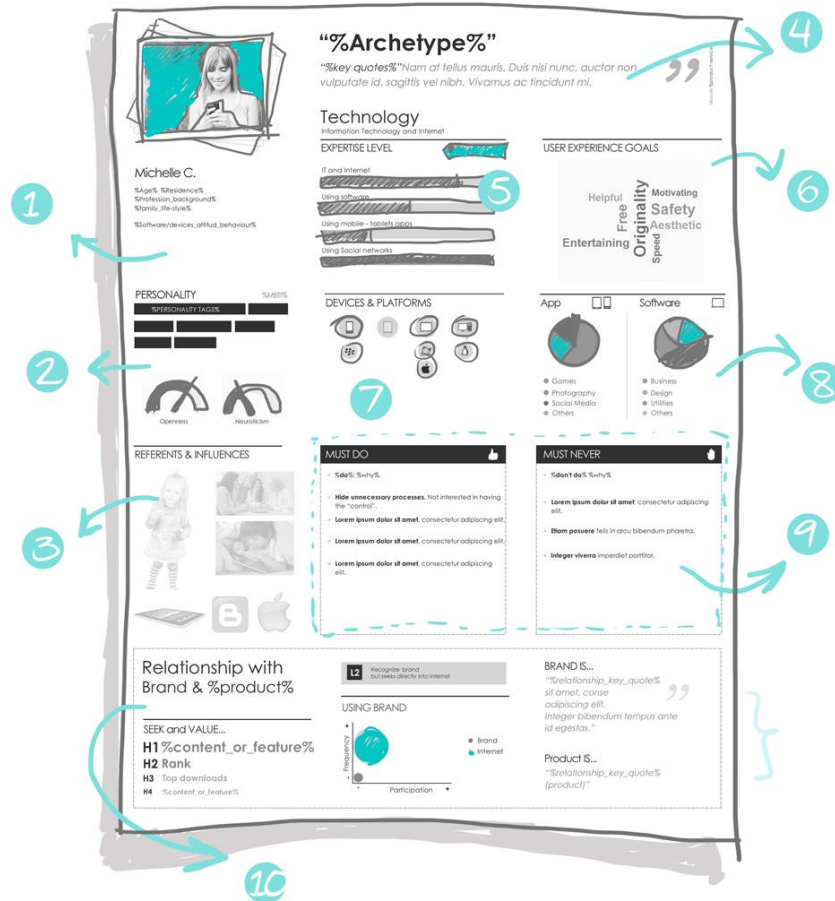
Step by Step: 'Building your User Persona'

1. **Collect information from all sources.** Interviews with stakeholders who possess information about final users (User Experience team, Marketing, Data Analyst, Product Owner, Product Manager, Customer care, etc.)
2. **Create an initial spectrum of potential users** (Based on information of point 1) this will help you not leave out important actors for your product/service.
3. **Conduct several real user's interviews selecting participants that match the initial spectrum** (sample will depend on the number of role identify in point 2) additionally you could use remote surveys. *In next point you will see some interviews tips.*
4. **Seeks patterns.** Split interviews and research data into sociodemographic data, motivation, skills and proficiency, personality, etc. **Do you spot a trend or pattern? What is the most determinant variable?** Use this variable to define your groups. For example, depending on the product one key variable could be the proficiency on computers, while in another case may be some lifestyle characteristic.
5. **Create various possible scenarios for your Personas** (Using information coming from analytics or product-logs and persona motivations, lifestyle, needs, etc.) *Alternatively define User Roles related to the Persona.*
6. **Test Persona – scenario – Product/service relationship:** What are the major problems, limitations, opportunities of our product? Discuss results and proposal with your team and stakeholders. Do the necessary adjustments.
7. **Remember always use the minimum number of personas for each product,** this will help to make your product more accurate. In case to have more than one persona define the *Primary persona* (the most relevant) with stakeholders.

2. PERSONA'S LAYOUT

Here I will present the layout with the 10 elements I use at work. This layout has emerged from an analysis of many persona's layouts and selection of the main elements we consider most useful for working. **In next point 3 (*elements*) you will see which method to follow in order to fill in each one of the elements of the user persona's layout.**

10 elements for User Persona



- | | |
|---------------------------|----------------------------------|
| 1- Profile | 6- User Experience Goals |
| 2- Personality | 7- used device and platforms |
| 3- Referents & Influences | 8- Domain details |
| 4- Archetype & quotes | 9- Must Do - Must Never |
| 5- Technology expertise | 10- Brand & Product relationship |

3. ELEMENTS of User Persona's layout

Now is time to fill in all the different elements of each persona. The purpose of this guideline was create some method that could be apply for different people in the team to create their personas, so we could somehow **guarantee we are using a common approach**, not only in the visual aspect, but also, and more important, that **we are measuring the same in each case and**

for each element on the layout. So, next you will find each layout's element described in details with all the variables included.

3.1 Profile:

What?

This module combines Psychographic, Demographic and Geographic profile and Behavioural profile.

VARIABLES GUIDELINE:

Demographic profile: Like: Age, Gender, Family size, Income, Occupation and Education.

Geographic: Where do your personas live and work? What's it like there? (It is a small or a cosmopolitan city?)

Psychographic profile: As Social class, Lifestyle, Activities, Opinions, Motivations and Personality characteristics (see 3.2)

Behaviouristic profile: It is a common marketing segmentation but we included other areas more related with the product/service, like **User Type** (Based on user knowledge, attitude and skills in this case about technology proficiency) and **Customer behaviour toward product**(relationship with our products)

User type: E.g. Inexpert, Medium, Advanced, Expert. (See 3.13 User type)

Customer behaviour toward products. Usage rate, Brand loyalty, User status: potential, first-time, regular, etc, Readiness to buy, Benefits sought, Etc. (See point 3.11 Relationship with...)

Persona's Name: Give your persona a name. Use only name and initial of last name. Persona name help to use this type of statements during design process:

"This idea would work for Ken, but not so much for Diana"

"Would Joan understand what is happening here?"

Why?:

- Quick read: help any reader to understand persona's background, personality and lifestyle in just a few lines.
- Narrative style allows easy reading and stickiness.
- This basic profile is share with mktg. department segmentation and is a type of content all stakeholder is used. (common language)

How?

Write short paragraphs in a narrative way (story based) that resume key points for understand persona life-style, background and motivations.

3.2 Personality

What?:

Personality it is a conflictive module seems exist a lot of research models and discussion about this. In order to apply a modelling that have sense for our daily work and in agile methodology, I propose a combination of two well know personality modelling: The **5 Factor model** (also known as Big Five) and the **Myers-Briggs Type Indicator (MBTI)** based on C. Jung Personality types.

To details about how to outline personality read my post [about using MBTI](#) and 5 Factors Model.

Why?

Why measuring personality, it is important?

- Any user modelling will not be complete without a personality profile. We know now that most of human decisions are based on personality and mood bias.
- Help us to create more realistic scenarios and mental models for each persona.
- Help us to better determine what need each user-type.
- Crossing personality with Proficiency level we get a very accurate model of "User-type".
- Personality will be used for established persona behaviour and response during the construction of an Experience Map, for example.
- Personality tags and Openness/Neuroticism gauge are a clear tool for help PO, developers and designer to put on the persona's shoes.

How?



User personas, Calculating personality, Big Five, Myers-Briggs Type Indicator

Based on real-users' interviews use: self-reported, in-line reading, behaviour and body language to calculate a rough MBTI type and the corresponding value for the two Big Five variables used.

a- For tagging personality using MBTI we first apply a basic questionnaire

b- Include "Big-Five Openness and Neuroticism" score. **Remember Openness is an inverse scale, low Neuroticism it is positive, when high is negative.**

3.3 Referents & Influences

What?

Represent: People, brands and product that influence his relation with key indicators for your product/service. *For example: internet, computers and other devices, software and app.*

References: Who? People, sites, brand or products become a referent point regarding to key indicators to your product/service. *For example, technology and software.*

Influences: Who? (people, site or brand) influence his decisions about key indicators for your product/service. *For example, technology and software.*

Why?

Quick understand persona influences and referents, background expertise, and lifestyle.

How?

Use images to illustrate this variable. This make information more visual and easy reading.

For example:



- a- Children: Clare have two children, most of the apps she try are games or activities for them’.
- b- Friends: Most apps recommendations come from Clare’s friends during a coffee break.
- c- IPAD: This is the most used device by Clare. Shared with her children, it is a family device.
- d-Blogger: Clare has a blog where she writes about personal interest.

3.4 Archetype & Quotes

What?

Archetype it is an attempt to a main classification of user using various information, as Personality, Background, Proficiency, Behaviour, User experience goals, etc.

The archetypes should change depending in your product/service domain, but in the example above, for example we suggest this 8 archetypes:

Why?

Archetypes help you to cluster similar personas.

How?

You will need to define archetypes based in your product/service. Take a look to [Microsoft's study on Multi-screening](#) to see some example archetypes.

Key Quote below archetype

What?

The key quote simulates a Persona's comment. Pretends reflect behaviour or persona attitude as user. *What did he expect, afraid or wants?* Could be general or product-related.

Why?

A simple sentence that suggests "the user voice" gives impact and "veracity" to our person.

How?

Use interview data. You can combine several real user interviews to create one quote, but try to keep the comment the most realistic possible. Only combine similar user-type and personality.

Select quotes that you consider key or most relevant. Depending on the persona characteristics (E.g. archetype and personality) fears may be more relevant than the desires, for example.

Finally add a note for indicate if persona was referring to Brand or to a specific product.

"%Archetype%"

"%key quotes%"*Nam at tellus mauris. Duis nisi nunc, auctor non vulputate id, sagittis vel nibh. Vivamus ac tincidunt mi.*



3.5 Technology Expertise (Proficiency level)

What?

This element will change depending on the domain of your product. In this layout example ICTs proficiency is a key variable to understand our users.

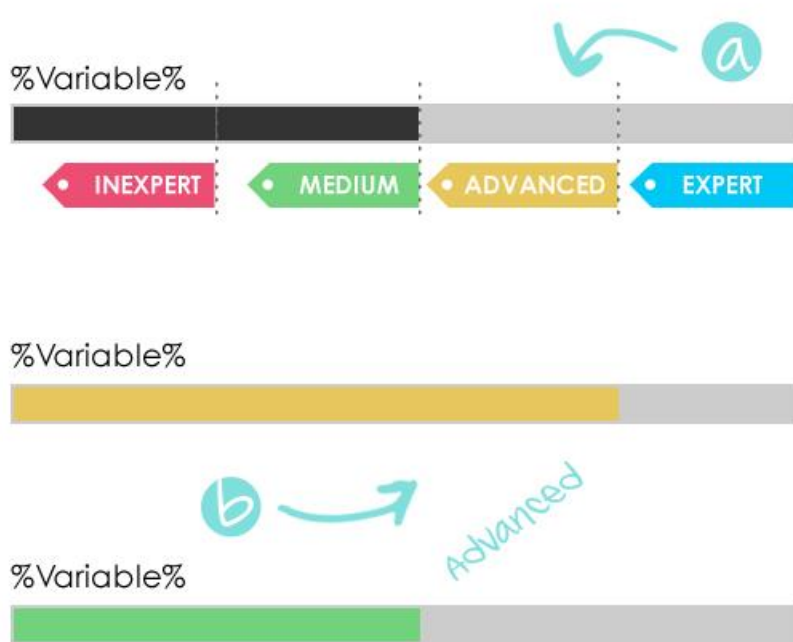
Why?

This graphic representation of proficiency by domain help any reader to easily understand the persona expertise level.

How?

First, select the variables you want to represent depending on the product/service domain. In the example we use: It and Internet / Using software / Using mobile -tablets apps / Using social networks but depending on the product related you could need to use different variables.

We split expertise as a progress bar with 4 levels. Going from inexpert to expert users type.



3.6 Experience Goals

What?

User experience is what the interaction with the system feels like to the users (subjectively). Some authors define Experience Goals as **user's priorities and expectations** and others use Experience Goals to reflect **how user feel when interact with the product**.

When select experience goals for your persona try identify which of them seems most relevant or priority for that persona.

Experience goals can be defining in general way or as product-related:

E.g:

General: *having fun, not feeling stupid or don't waste time.*

Product related: *feel confident and secure with the transaction* (Ej. persona using a online banking)

Why?

User experience goals help us to prioritize user interest regarding to interactive systems, this could be used for take interaction design decisions or as determinant for adding a new feature.

USER EXPERIENCE GOALS



How?

Use interview and survey information to define a set of most significant User Experience Goals from your persona point of view.

In this layout I use TagCloud to visualize the key UXGoals by hierarchy.

3.7 Devices & Platforms

What?

This module reflect devices and platforms persona uses. Depending on your product/service domain this module might not be relevant.

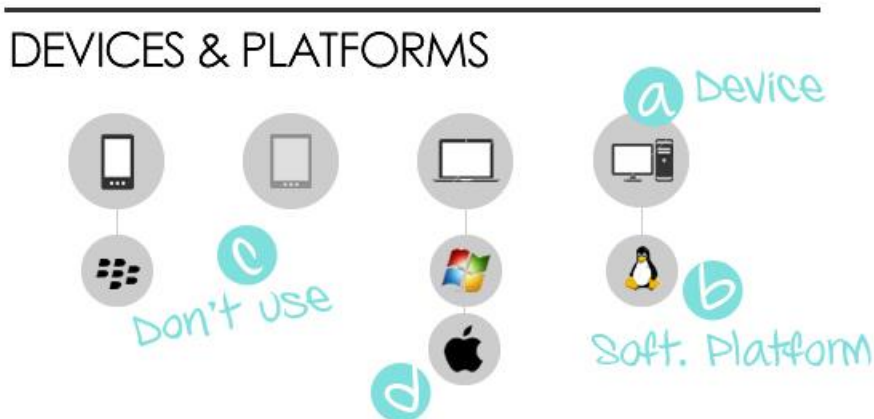
Why?

In the case of a software product this module allows to quickly understand persona skills and habits related with devices and technologies and possible expectations. E.g. What devices have? Is Mac or PC user?

How?

Define the variables relevant for your product/service.

For this example, we use: Device and Software Platform.



3.8 Domain details: Used Software / Apps*

What?

This element also should change if you are building personas for a different domain, in this example the persona belongs the software domain, but you should replace for any other related to your own company/product domain.

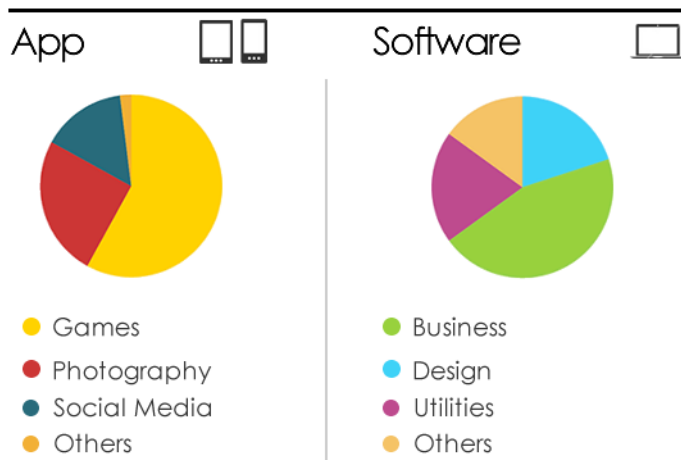
In the example this module reflects persona software/app consumer habits.

Why?

It allows us to understand the interests and habits of the user as software consumer for their main devices.

How?

We use Pie chart to present most used software-app category.



3.9 Must Do / Must Never

What?

Must Do and *Must Never* are basic guidelines for interaction and experience. Include what persona expect and want (must do) and what frustrates him and annoys (must never).

This module mixes all persona's elements: **Personality + proficiency + User Experience Goals**. Basically it is about put in context or in a specific scenario the User Experience Goals adjusting to his personality and experience.

E.g. : We include "Ease of use" as a Experience Goal of this persona (see 3.10) then one "Must do" tip arising from these could be:

*"Hide unnecessary process. This persona is not focus in control but in facility" (**Interaction**)*

*"Need clear text-blocks with more important concepts. Feels overwhelmed with information overload and complexity" (**content**)*

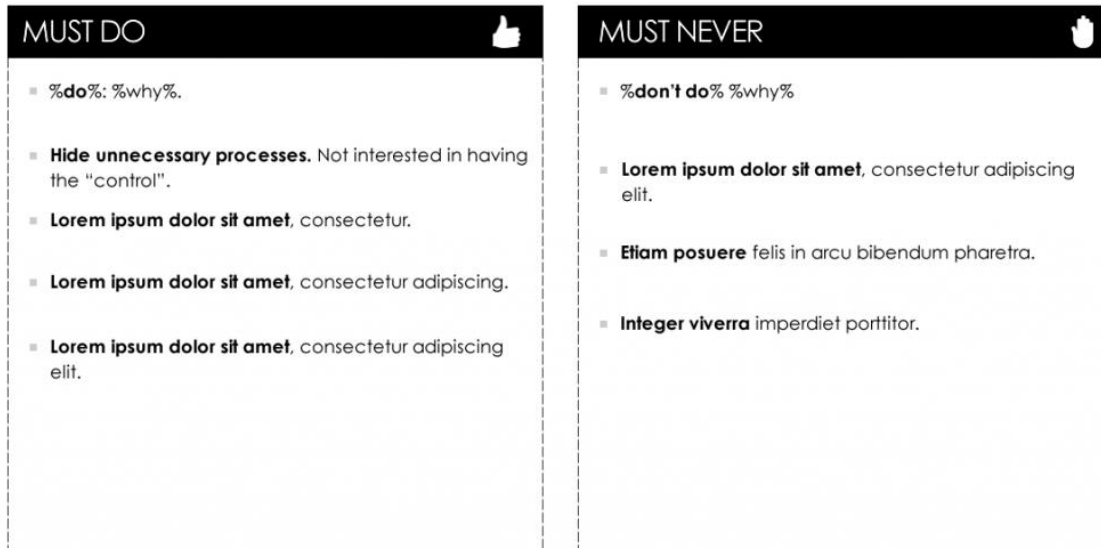
Why?

- It is a quick tool for design decision making.
- is easily actionable information

How?

Build the MUST DO / MUST NEVER sentences following the "what" example. Use MUST NEVER to sentences with stronger emotional effect.

Structure: sentence is composing from a bold phrase (Do / Don't do), for specific action and a normal text sentence for resume the reason why (why).



3.10 Relationship with the brand and the product

What?

This module reflects the persona relationship with brand and/or specific product.

The module includes 4 areas:

a- **Seek and Value:** Most seek and value content or functionality from our brand (or competitor) for that persona.

b- **Level of user:** Brand-persona relationship (In the example we define 3 levels):

Level 1: Do not know the brand or use our products.

Level 2: Recognize brand but seeks directly into Internet.

Level 3: Know and actively use our products / services.

c- **Bubble graph:** Two axes in this

case *participation* and *frequency*. Where **participation** indicate **how much active it is the persona** (write comments?) and **frequency** reflects **how often persona visit our brand site**, for example. **Depending on the product this axes could change for reflect another important KPI.**

Other KPI could be:

- Brand loyalty
- User status: potential, first-time user, regular, etc.
- Benefits sought,

d- **Relationship Key quote:** A brief quote that reflects persona relationship with our brand or product (love it, hate it? etc).

Why?

Resume one useful marketing segmentation: Behaviouristic segmentation.

How?

a- **Seek and Value:** Select top **content** or **functionality** for user and organize them by relevance from top to bottom.

b- **Customer type:** Select the level and copy description following template.

c- **Bubble graph:** Circle size reflects how much persona use our brand products or competitor. Then locate bubble in the corresponding position of axis x or y depending in the frequency of visit and how participative the persona is (comment, review, rate, etc).

