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What are personas?

A persona is a representation of a user, typically based off user research and incorporating user goals, needs, and interests. Alan Cooper categorizes personas into three types. Each has its own advantages and shortcomings. http://www.cooper.com/people/alan_cooper

Marketing personas focus on demographic information, buying motivations and concerns, shopping or buying preferences, marketing message, media habits and such. They are typically described as a range (e.g., 30—45 years old, live in USA or Canada), and explain customer behaviour but do not get to the why behind it. Marketing personas are good for determining what types of customers will be receptive to certain products or messages, or for evaluating potential ROI of a product. What they are not good for is for defining a product or service – what it is, how it will work, and how it will be used; or for prioritizing features in a product or service.

Proto—personas are used when there is no money or time to create true research—based personas – they are based on secondary research and the team's educated guess of who they should be designing

for. According to Cooper, using a proto—persona to drive design decisions is still better than having no persona at all — though of course they should be validated with research!

Design personas focus on user goals, current behaviour, and pain points as opposed to their buying or media preferences and behaviours. They are based on field research and real people. They tell a story and describe why people do what they do in attempt to help everyone involved in designing and building a product or service understand, relate to, and remember the end user throughout the entire product development process. Design personas are good for communicating research insights and user goals, understanding and focusing on certain types of users, defining a product or service, and avoiding the elastic user and self—referential design.

Characteristics of a good persona

Next, we went through a quick checklist of what makes a good persona. As a group, we agreed on the following criteria:

- They reflect patterns observed in research
- They focus on the current state, not the future
- Are realistic, not idealized
- Describe a challenging (but not impossible) design target
- Help you understand users'

  - Context
  - Behaviours
  - Attitudes
  - Needs
  - Challenges/pain points
  - Goals and motivations

In groups on 4—5, we analysed a few examples of personas. For each persona, we pointed out what was good and what we could improve about the way they were constructed. From there, it was time to make our case to the business.

Business cases for personas

Many organizations struggle to create personas, and as UX practitioners that makes our jobs more difficult. During the workshop, participants identified many concerns:

- How can we convince our business stakeholders to switch the company's focus to an individual user persona when the business goal is to grow the company's customer base and cover more users – not *less*?
- How do we avoid the trap of thinking we much delight only one user? (This often comes up when a few key personas have differing goals.)
- What do we do if the solution to a persona's needs and desires is outside the company's business scope?
- What kind of answer can we give a business stakeholder who wants to know how this new, single persona can be quantified and translated into a market size and revenue forecast?

Although the workshop didn't delve into specific answers, Alan Cooper addressed some of our questions when the man himself took the stage. He gave us some real—life examples of using personas for a business. He reminded us that the idea behind persona creation is this: by delighting a single persona the rest will follow. Or in broader terms -

Widening your target doesn't improve your aim. *To create a product that must satisfy a broad audience of users, logic will tell you to make it as broad in its functionality as possible to accommodate the most people.* **Logic is wrong.**

When you design for your primary persona, you end up delighting your primary persona and satisfying your secondary persona(s). If you design for everyone, you delight no one. That is the recipe for a mediocre product.

It sounds like a huge leap of faith to focus on just one type of user, but the case study examples were convincing. For example, the OXO grips products were initially designed for a user with arthritis — the inventor's wife. She liked to cook, but found that most cooking and food preparation utensils were painful to use. She also found that most of the solutions, because they were ugly, stigmatized the person with disabilities while using them. The opportunity was not just to design cooking utensils that were comfortable to hold in your hand; the products also had to set a new aesthetic trend that would

not stigmatize the user type as "handicapped". This new aesthetic would establish a new trend in products for the home and would be seen as usable and desirable by all potential customers.

The value of personas

After Alan's talk, we brainstormed in small teams what can happen when we don't use personas in design. For example:

- Every time a customer makes a request, the design changes.
- Everyone on the team has a different opinion about who we are designing for (who the target user is). This can result in:

    - Self-referential design
    - The "elastic user" – constantly evolving to suite personal goals + interests

- We can't agree on which features to prioritize (what the user's primary goals are).
- We spend time developing features that never get used (edge cases).

However, these negatives are not always obvious to stakeholders and executives. So what's a UX designer to do? Cooper suggested that in sceptical environments, it's best to demonstrate, not tell, the value of personas:

 Don't wait for permission to create personas. Make proto—personas on your own and show how they help your team make better product decisions. Invite key decision—makers to participate in a proto—persona workshop that fosters interest in personas and introduces thinking from a user—centric perspective.

Empathy mapping is one solution. Empathy mapping allows outsiders to internalize personas in ways that listening to or reading a report cannot. It focuses the team on the underlying "why" behind users' actions, choices and decisions.

Using personas throughout the design process

If a team doesn't consider the context of the persona's typical environment and activities, they risk creating a product experience that is disjointed, broken or incomplete. **The persona is the voice of the user.**

Scenarios, meanwhile, give a persona context and help us understand the main user flows. A scenario tells the story of how the product will be used in the future. It is guided by persona needs and goals, rather than by system features and capabilities. The scenario's context helps elicit and prioritize requirements.

In short, the use of a minimum of two personas in the design process is what connects the product to the end user. **Design for the primary – accommodate the secondary.**

However, personas are only half of the solution, and by themselves they don't go very far. The secret sauce is personas + scenarios. The next step for other designers who have taken this course is to learn to create great scenarios; especially when it comes to how they can be applied throughout the full user or customer experience journey.

If there is one key thing designers can take away from Cooper's course, it's the value of using personas to create better designs. Keep in mind these four benefits:

- Personas can be used to validate or disprove design decisions.
- Personas allow us to vet and prioritize feature requests.
- Personas are an inspiration in ideation.
- Personas are a key element in critiques.

Additional Notes:

In the art that user experience has become, we talk a lot about not letting our client's personal preferences get in the way of what would be best for the user. Yet no matter how often we remind our clients and teams of this throughout the design process, we still find that users are unpredictable, and some changes need to be made post-launch to reflect how they actually use the product.

There's no fool-proof way to avoid this problem, but I do think that we can improve our processes to be more user- and goal-based. No, I'm not talking about doing more studies with users, eye-tracking studies, or heat maps; what we need to do is bring the user into decisions we make from the beginning.

This is easier than it sounds, and a simple way to accomplish this is to incorporate personas into our work. In design circles, a persona is an **archetypal representation** of a user. The idea is as old as marketing, but Alan Cooper solidified the idea into a design philosophy in 1995, and designers have been using it to improve their user experience ever since.

If you've paid any attention to the UX community, especially in the last few years, you've likely heard the word "persona" tossed around a lot. From what I've seen, however, the number of people specializing in user-centric design who actually implement personas is pretty slim, and the number of designers who make them a pivotal part of the process is even slimmer.

So, define a persona?

Put simply, a persona is a representation of a client's customer. They are fictional characters that we create, and they serve as a reminder of who our users are. Like any good fiction, a well-made persona has its own story to tell. The more believable the story, the better representation the persona is of users; the more accurate the representation, the more likely our decisions will reflect the user's needs.

Our persona's "story" consists of a name and photo, title, by-line, and, most importantly, his goals and frustrations (or "pain points"). Our job is to meet his goals and solve his frustrations with what we're building. Ultimately, personas help us make the user's needs more memorable throughout the process.

Some teams may include stories and more in-depth biographical information to assist in understanding how the user might respond to certain decisions. This may make the personas more realistic, but be careful: **people are not necessarily stereotypes**, and we don't want to use personas inappropriately by trying to oversimplify our target demographic users.

Case study: 3 degrees

The creative team at Phuse http://phuse.ca/ developed the 3Degress
https://dribbble.com/phuse/projects/11159-3Degrees interface The purpose of the application is to
allow users to tap into their existing social networks to find new people through mutual friends.

Based on our client's research, when we began developing the application there were two basic types of
people that would be using it. We worked with the client to create personas of those two users in order
to help keep our development on track.

MEET STEVE

Steve Medeiros
"My parents taught me not to talk to strangers."

- Age: 22
- Role: Graduate
- Area: Finance
- Computer Literacy: High

- Recent graduate of Syracuse University
- Accepted a job in NYC
- Bored of his routine, looking for something new

This is Steve, one of our two personas.

This is one of the personas we created for the 3Degrees project; we put a face and name to our user to
make the process more memorable and human.

Our next effort was to write out the goals and frustrations of our new friend. This is the real meat of the
persona. By writing them out, we know what goals we have to meet and what frustrations we're trying
to solve.

Goal

- Find someone to date

Frustrations

- Doesn't have enough time to go out and find people to date
- Doesn't feel comfortable approaching a complete stranger to date
- Sees his friends with tons of attractive potentials that he'd like to find out more about

Narrative

Steve is 22 years old, single, and a recent graduate from

Syracuse University. He accepted a job in NYC working in finance, and has moved into a tiny apt with a buddy from college. A handful of his college friends moved into NYC, with others spreading out to Boston, Washington DC, Albany, San Diego, as well as a dozen other cities. For the first time in his life, Steve doesn't have an established network. Instead, he can count on two hands the number of people he knows in the city.

Steve finishes work on a Tuesday, goes to the gym and comes home around 8. He orders Chinese food with his roommate, and they each sit in their cramped apartment watching TV with laptops on their laps until 11:30 when they go to bed. This routine occurs Monday – Wednesday, some Thursdays and Fridays, and a variation occurs Sunday night (no work during the day).

We know a whole lot about The Goings-On of Steve.

For the 3Degrees project, we also decided to include narratives to make each persona a little more memorable; Keep in mind, though, that this can be tricky. Background information may lend an air of credibility to our persona, but we must be careful not to stereotype.

When do you need a persona?

Any time you're working with user experience, you should be using personas. In most cases, though, personas are used when there is more than one type of user to keep track of. For example, when working on 3Degrees, we decided that there were two different types of users accessing the site.

Originally, the goal of the 3Degrees project was to connect people moving to different cities. Our client's research told him that people new to an area (and looking to network online) are generally interested in one of two things: friendships or romantic relationships. Therefore, we decided on two different types of users to satisfy each of those roles: one looking for a date (Steve, above), and another who is looking friend to play tennis with (Ramona, not pictured).

We've seen projects with up to five personas. Some projects may have even more. Trying to remember those five user types would be pretty difficult without something to remind us constantly about them. Instead, the personas allow us to refer back to the user(s) at each step of the design process and make sure all their needs are being met.

Think of all the times you get in debates with clients or colleagues about where to place an element, how something should be styled, or whether a feature is needed. These debates can end up getting heated based on people's egos and their personal opinions on what looks better and how something should be. Personas give us the opportunity to avoid that sort of conflict within design teams and with clients. They help mediate discussions based on the goals of the users.

Instead of saying, "I think the photos should be bigger," we might say, "Well, Steve will likely be more interested in photos and basic information of other potential matches than how they answered specific questions." In this way, we've given the decision to the user, and explained his reason for making it. Our personal opinions and egos are no longer relevant; only the user's opinions matter.

Personas have a life

In 2010, John Pruitt and Tamara Adlin's book called <u>The Persona Life Cycle</u>, where the author related the creation and use of a persona to the stages in a person's life. This is a handy way of looking at the life of a persona throughout the project and beyond. For example, there is essential research and planning that goes into their conception to ensure they are being brought into an environment that can nurture their growth. Then, throughout their adulthood, they help us make decisions and grow with the maturity of the project.

Sad zombie persona is sad.

Much like some adolescents, I think **personas can feel left out** as well. We may not look at them enough, or we might ignore them completely. In fact, we have to be careful, because as Tom Allison says in his UX Cafe presentation http://www.uxcafe.de/2010/06/zombie-personas/ it's also possible to have these "zombie personas" that lie neglected around our processes. If we don't use them, they're no better than the ones that go wholly unrealized.

It takes a village

Now, you might be thinking "well, if I were a person in charge of designing the personas, I'd just make it agree with everything I say." This is a problem teams suffer from. The importance of a persona is not to represent *you*, it's to represent the user, whose goals and frustrations are his or her own.

User experience only works when the people that are developing the product work as a team. It's not only the designer's role to come up with a design that is user-focused, but the responsibility must also be taken on by the client and developers.

To paraphrase an ancient African proverb, it takes a village to raise a child. In a similar vein, it takes a team to create a persona. They can't be created by one person, otherwise they'd be too subjective. We need to have the whole team involved in the process to ensure that personal biases are kept to a minimum. It's useful to base these personas on real users and not just ones we think *might be users*, therefore some field study and customer development is always important prior to the persona's conception.

A great way to embed personas throughout the process is to have different members of the team be responsible for different personas' goals. That way, when decisions are being made, one team member

isn't trying to figure out if the goals for five personas are being met; five people are weighing in with their thoughts about their specific personas.

Convincing people to use personas

In 2009, Frank Long conducted a study with 9 groups of students from the National College of Art and Design in Dublin that got the groups to use personas and find out how effective they were in their process of creating designs that served the users, with Neilsen's 10 Usability Heuristics as a base for the scores that were given – *see below.*

In the study, Long found that the Beta and Gamma teams using personas scored higher on Neilsen's list than the Alpha team that acted as a control group. In the focus group that concluded the study, group members noted that personas did help guide design decisions, and they were able to clearly recall their persona and its key bits of information.

Goals: Foster world's sweetest mullet; develop hot lady repellent. Frustrations: Bikes with gears; rules.

While this study isn't as detailed as some would hope it to be, it does reflect the usefulness of personas as a tool. They don't take long to build or maintain, so there's really no harm in taking a bit of time to put them together.

Just ask any team that has used personas in their design process; there is an important role for personas in our workflows, whether they're 100 percent quantifiable or not.

How important is the user in your design?

We know it's not fool-proof, but personas give us a way to manage user goals and frustrations before the application launches.

There's a lot of debate over the need for personas in user experience, and there's a lot of truth in statements against their use. Ultimately, however, personas are a physical representation to remind us who we're building for, much like one would have a list to remind oneself of what to buy at the grocery store. When used appropriately, personas can be an invaluable tool in the design of important user experiences.

Once again, personas should **always** go hand-in-hand with real user interviews and studies, and all the other tricks of the trade that we have come to value so highly like heat maps, eye-tracking studies, and, of course, sets of proven user patterns.

It's vital to the success of our applications to keep the design process focused on the user experience. How are you keeping the user in mind throughout your process?

10 Usability Heuristics for User Interface Design

Visibility of system status

The system should always keep users informed about what is going on, through appropriate feedback within reasonable time.

Match between system and the real world

The system should speak the users' language, with words, phrases and concepts familiar to the user, rather than system-oriented terms. Follow real-world conventions, making information appear in a natural and logical order.

User control and freedom

Users often choose system functions by mistake and will need a clearly marked "emergency exit" to leave the unwanted state without having to go through an extended dialogue. Support undo and redo.

Consistency and standards

Users should not have to wonder whether different words, situations, or actions mean the same thing.

Error prevention

Even better than good error messages is a careful design which prevents a problem from occurring in the first place. Either eliminate error-prone conditions or check for them and present users with a confirmation option before they commit to the action.

Recognition rather than recall

Minimize the user's memory load by making objects, actions, and options visible. The user should not have to remember information from one part of the dialogue to another. Instructions for use of the system should be visible or easily retrievable whenever appropriate.

Flexibility and efficiency of use

Accelerators -- unseen by the novice user -- may often speed up the interaction for the expert user such that the system can cater to both inexperienced and experienced users. Allow users to tailor frequent actions.

Aesthetic and minimalist design

Dialogues should not contain information which is irrelevant or rarely needed. Every extra unit of information in a dialogue competes with the relevant units of information and diminishes their relative visibility.

Help users recognize, diagnose, and recover from errors

Error messages should be expressed in plain language (no codes), precisely indicate the problem, and constructively suggest a solution.

Help and documentation

Even though it is better if the system can be used without documentation, it may be necessary to provide help and documentation. Any such information should be easy to search, focused on the user's task, list concrete steps to be carried out, and not be too large.