ITI0209: User Interfaces

05. Deliverables. Personas.

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In order to solve a real user problem, you need to have a clear problem statement in mind; in order to write this problem statement, you first need to understand your users and their needs.

Personas are fictional characters, which you create based upon your research in order to represent the different user types that might use your service, product, site, or brand in a similar way.

Knowing the Audience

Knowing your audience influences the features and design elements - thus making your product more useful. A persona clarifies the target audience by answering the following questions:

- Who is my ideal customer?
- What are the current behavior patterns of my users?
- What are the needs and goals of my users?
- What issues and pain points do they currently face within the given context?
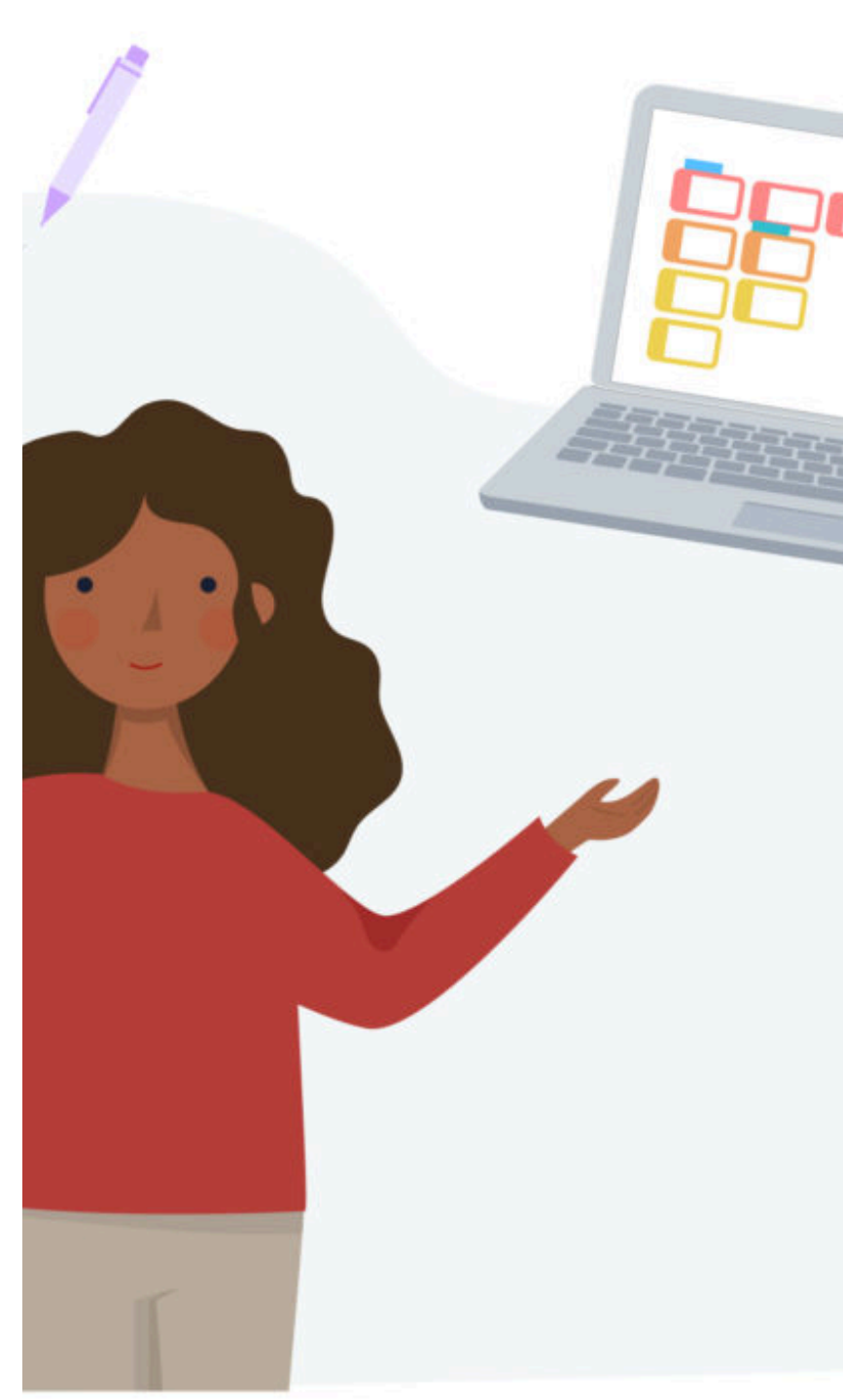
Personas Help to Prevent

- **Self-referential design**. This happens when designers design as if they are making the product only for themselves, when in fact the target audience is quite unlike them.

- Design for **elastic users**. An elastic user is a generic user which means different things to different people. Designing for an "elastic user" happens when product decisions are made by different stakeholders who may define the 'user' according to their convenience.

Personas Help to build Empathy

- **Gain a perspective similar to the user's**. Creating personas can help designers step out of themselves and recognize that different people have different needs and expectations. By thinking about the needs of a fictional persona, designers may be better able to infer what a real person might need.

- **Identify with the user** they are designing for. The more designers engage with the persona and see them as 'real,' the more likely they will be to consider them during the design process and want to create the best product for them.
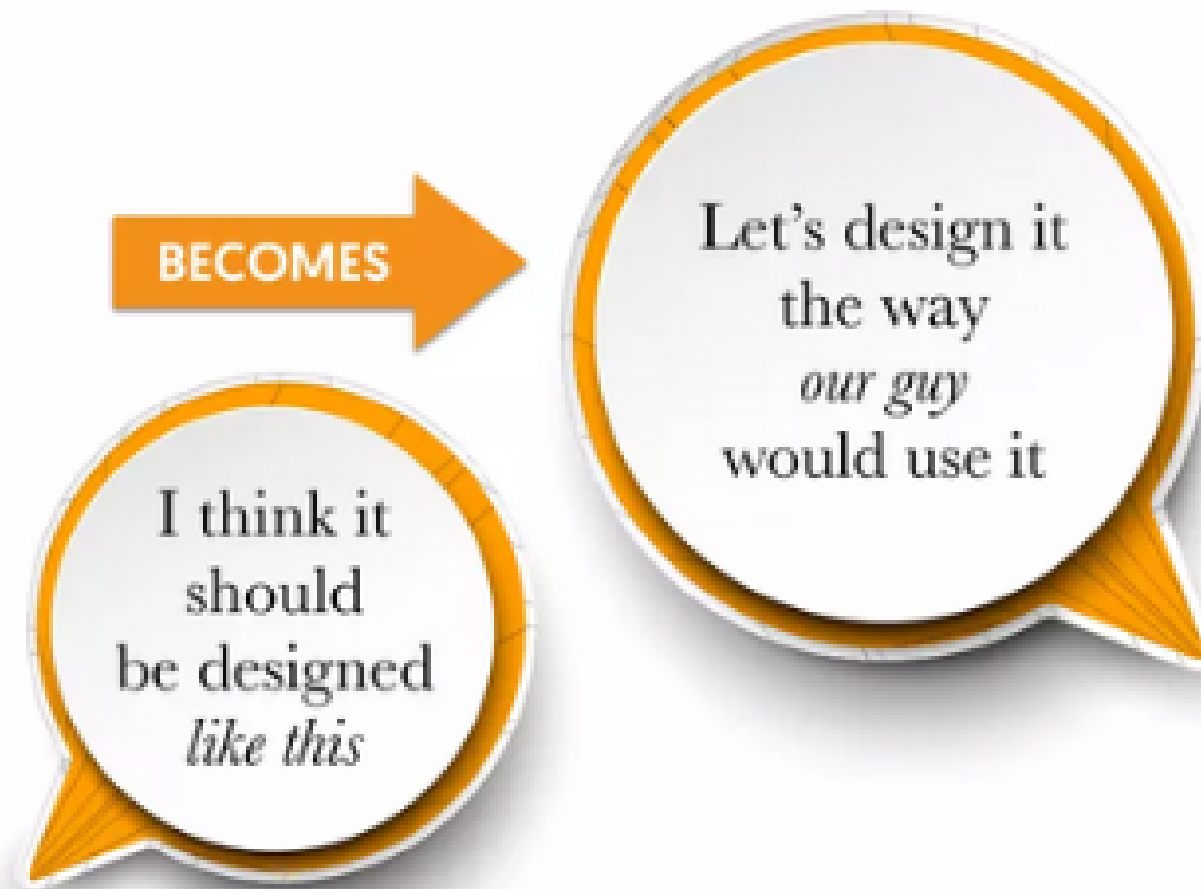
Personas change the perspective to **simplify design and development decisions**. By creating a concept consumer, we **uncover valuable insights** that provide development teams with **fertile ground** to create.

Characteristics of a Good Persona

1. Personas aren't fictional guesses at what a target user thinks. Every aspect of a persona's description should be tied back to real data - observed or researched.

2. Personas reflect real user patterns, not different user roles. Personas aren't a reflection of roles within a system.

3. A persona focuses on the current state (how users interact with a product), not the future (how users will interact with a product)..

4. A persona is context-specific - it's focused on the behaviors and goals related to the specific domain of a product.

Goals
What they want
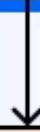
Purpose
Why they want it

Approach
How they want to achieve it

Four Different Types of Personas:

1. Goal-Directed

The objective of a goal-directed persona is to examine the process and workflow that your user would prefer to utilize to achieve their goals in interacting with your product or service. There is an implicit assumption that you have already done enough user research to recognize that your product has value to the user and that by examining their goals, you can bring their requirements to life.

1. Persona

Defines who the story is about. This main character has attitudes, motivations, goals, and pain points, etc.

3. Goal

Defines what the persona wants or needs to fulfill. The goal is the motivation of why the persona is taking action. When that goal is reached, the scenario ends.
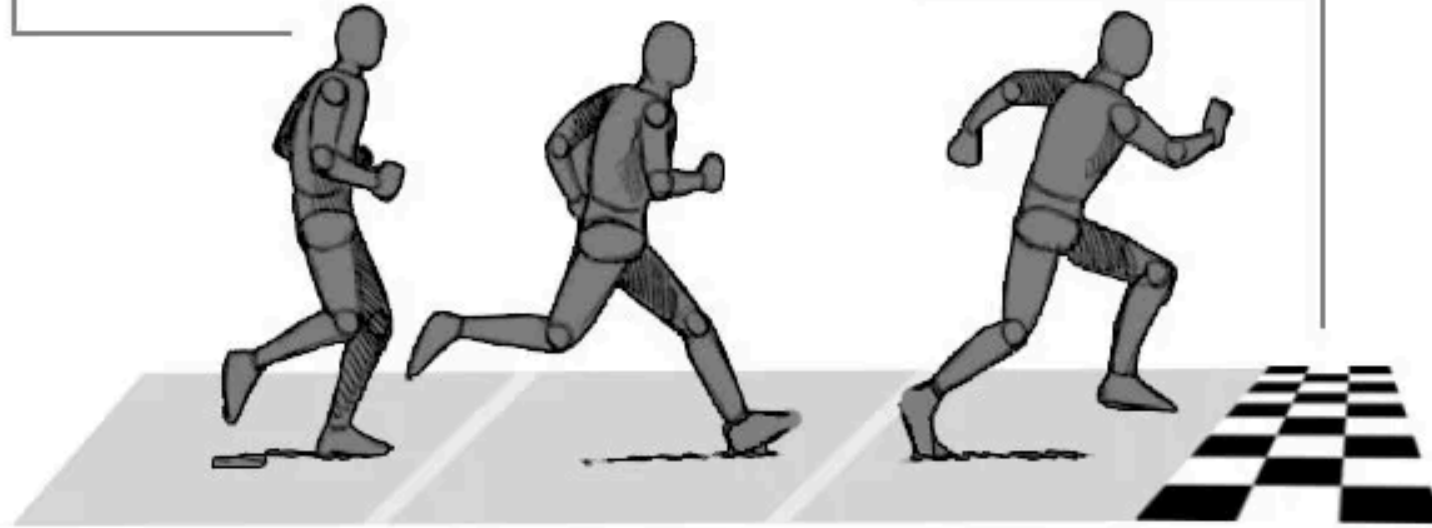
2. Scenario

Defines when, where, and how the story of the persona takes place. The scenario is the narrative that describes how the persona behaves as a sequence of events.

Transforming

- Customers with propensity to increase/decrease employee count regularly
- Require agile scalability and flexibility
- E.g. acquisitions, layoffs, temporary seasonal workers
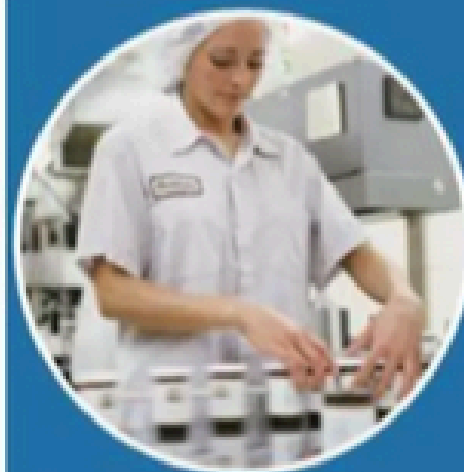- Business Value Deck: Office 365 Transforming Enterprise Customer

Cost Saver

- Customer primarily looking to cut costs, value a focus on TCO
- Interested in moving from capex to opex
- Business Value Deck: Office 365 Cost Saver Enterprise Customer
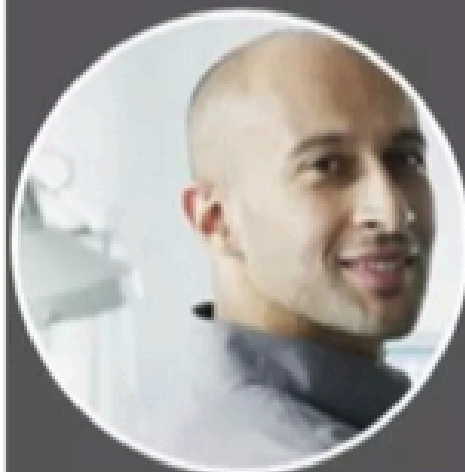
Google Compete

- Customer in active discussions with Google
- Greater focus on collaboration and messaging workloads
- Business Value Deck: Office 365 Google Compete Enterprise Customer

Task Worker

- Population of structured task workers who don't have dedicated PCs
- Prevalent in retail, hospitality, manufacturing and healthcare industries
- e.g. Manufacturing Plant Floor worker, Nurse, Barista
- Business Value Deck: Office 365 Task Worker Enterprise Customer
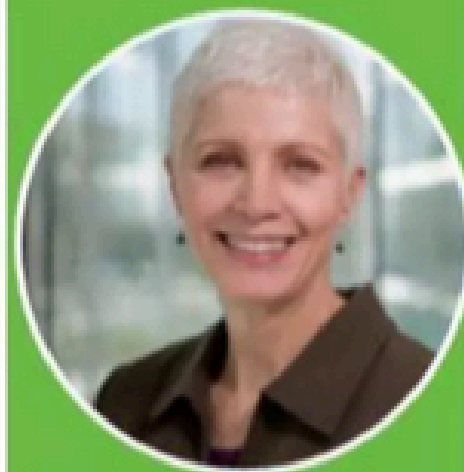
Dated Environment

- Customers on older versions (N-2+) of Exchange, SharePoint and Office who don't have new version rights
- Want to adopt new business productivity capabilities and stay current
- e.g. Customer deployed on Exchange 2003 without Software Assurance
- Business Value Deck: Office 365 Dated Environment Enterprise Customer

Presentation relevant to all: Office 365 Enterprise Core Business Value Deck
Main Resource for Deeper Assessment: Customer Decision Framework

Four Different Types of Personas:

2. Role-Based

The role-based perspective is also **goal-directed**, and it also focuses on behavior. The personas of the role-based perspectives are massively data-driven and incorporate data from both qualitative and quantitative sources.

The role-based perspective focuses on the user's role in the organization.

In some cases, our designs need to reflect upon the part that our users play in their organizations or wider lives. Where will the product be used? What's this role's purpose? What business objectives are required of this role? Who else is impacted by the duties of this role? What functions are served by this role?

Four Different Types of Personas:

3. Engaging Personas

Engaging personas can incorporate both **goal** and **role-directed** personas, as well as the more traditional rounded personas. These engaging personas are designed so that the designers who use them can become more engaged with them. The idea is to create a 3D rendering of a user through the use of personas. The more people engage with the persona and see them as 'real', the more likely they will be to consider them during the process design and want to serve them with the best product. These personas examine the emotions of the user, their psychology, backgrounds and make them relevant to the task at hand. The perspective emphasizes how stories can engage and bring the personas to life.
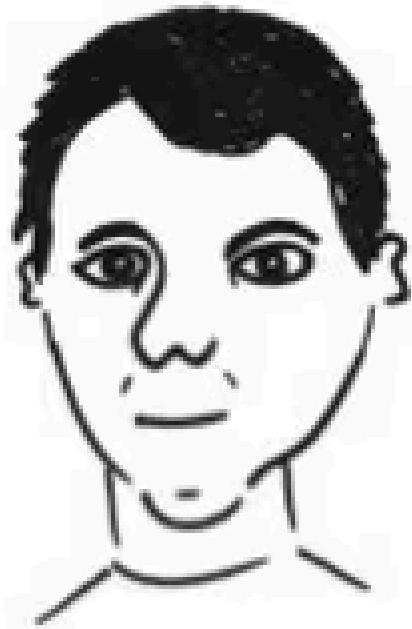
Peter

Works as product manager for a mid-sized company.

Is 35 years old, holds a marketing degree.

Has got experience working as a product owner on software products with agile teams.

Has had some Scrum training.

Has managed mature products successfully. Now faces the challenge of creating a brand-new product.

Wants to leverage his agile knowledge but needs advice on creating innovative product using agile techniques.

Four Different Types of Personas:

4. Fictional Personas

The fictional persona does not emerge from user research (unlike the other personas), but it emerges from the experience of the UX design team. It requires the team to make assumptions based upon past interactions with the user base and products to deliver a picture of what, perhaps, typical users look like. There's no doubt that these personas can be deeply flawed (and there are endless debates on just how flawed). You may be able to use them as an initial sketch of user needs

.. And even More

- **Negative personas** represent users who are not part of your target audience. They can help clarify who you are not designing for and prevent feature bloat or design choices that might cater to irrelevant user groups.

- **Influencer personas** represent individuals or groups who may not directly use the product or service but have an influence on the decision-making process.

- **Secondary persona** are additional user groups that, while not the primary focus, still play a significant role in the user base. Design decisions may consider secondary personas to a lesser extent than primary personas.
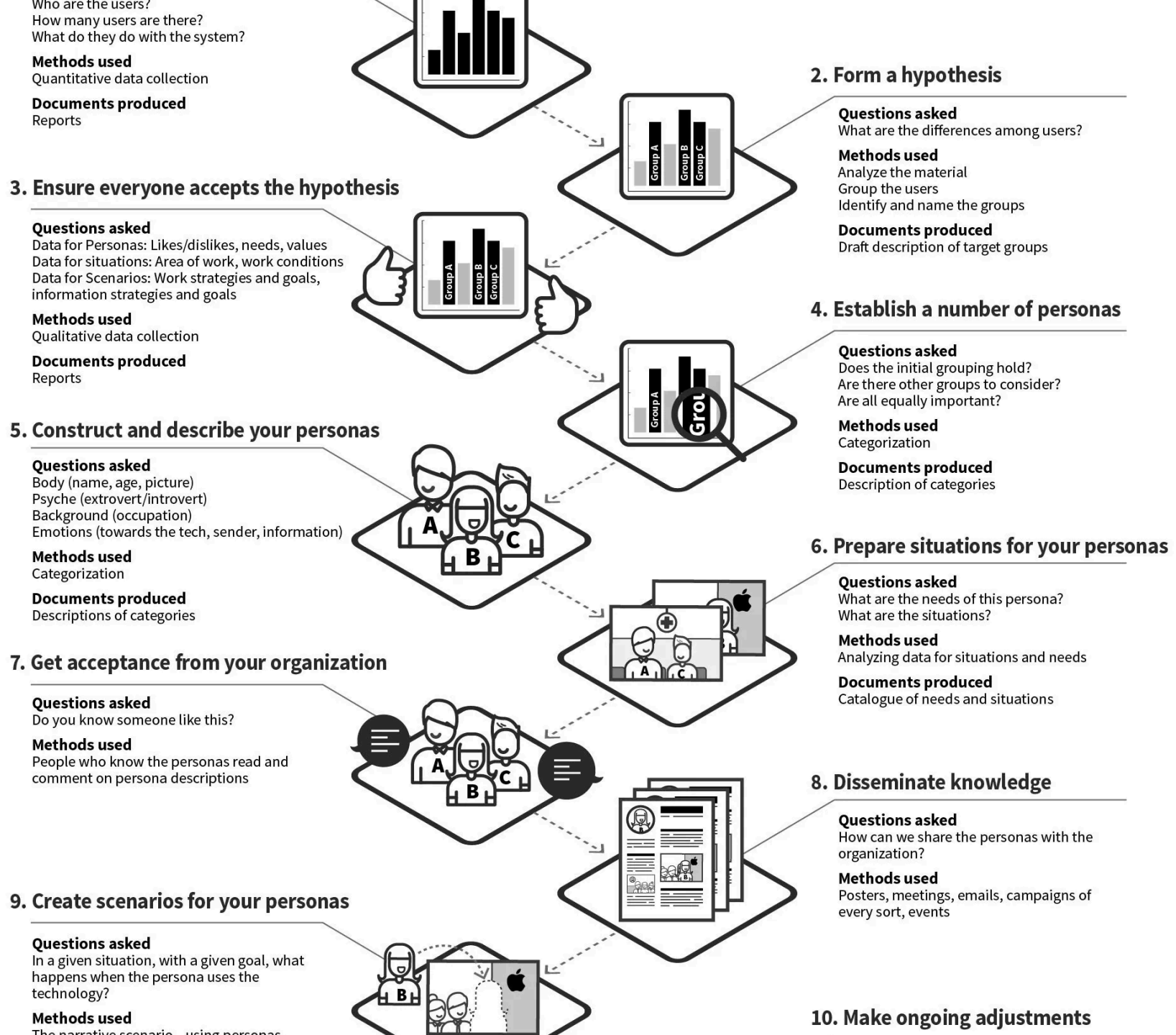
.. etc

https://purplegriffon.com/blog/what-is-a-user-persona-in-ux

https://www.slideshare.net/slideshow/personas-34655305/34655305

10 Steps to Personas

https://public-images.interaction-design.org/literature/articles/materials/gWFgwgwtHxivlIA21akeBT1c2pbCJXS2RXRxDDMw.jpg

Who are the users?
How many users are there?
What do they do with the system?

Methods used
Quantitative data collection

Documents produced
Reports

2. Form a hypothesis

Questions asked
What are the differences among users?

Methods used
Analyze the material
Group the users
Identify and name the groups

Documents produced
Draft description of target groups

3. Ensure everyone accepts the hypothesis

Questions asked
Data for Personas: Likes/dislikes, needs, values
Data for situations: Area of work, work conditions
Data for Scenarios: Work strategies and goals, information strategies and goals

Methods used
Qualitative data collection

Documents produced
Reports

4. Establish a number of personas

Questions asked
Does the initial grouping hold?
Are there other groups to consider?
Are all equally important?

Methods used
Categorization

Documents produced
Description of categories

5. Construct and describe your personas

Questions asked
Body (name, age, picture)
Psyche (extrovert/introvert)
Background (occupation)
Emotions (towards the tech, sender, information)

Methods used
Categorization

Documents produced
Descriptions of categories

6. Prepare situations for your personas

Questions asked
What are the needs of this persona?
What are the situations?

Methods used
Analyzing data for situations and needs

Documents produced
Catalogue of needs and situations

7. Get acceptance from your organization

Questions asked
Do you know someone like this?

Methods used
People who know the personas read and comment on persona descriptions

8. Disseminate knowledge

Questions asked
How can we share the personas with the organization?

Methods used
Posters, meetings, emails, campaigns of every sort, events

9. Create scenarios for your personas

Questions asked
In a given situation, with a given goal, what happens when the persona uses the technology?

Methods used
The narrative scenario, using personas

10. Make ongoing adjustments

Lean Personas

A lean persona is basically a concise—or starter—version of the user persona. Unlike user personas, which require deep user research by a key individuals, market competition and an extensive persona report, lean personas aren't based on real data. Instead, these early personas are created using research cadences and involve the whole team.

Scenarios for Lean Persona

Here are scenarios when creating lean user persona templates makes sense:

- When doing rapid product development—to get design, development and the client on the same page fast

- When you're on a budget. If this is your only type of persona definition, make sure your personas are backed up by existing usability data and analytics

- When performing a website redesign—to help you draft your design assumptions

- Lenient stakeholders — If your stakeholders don't demand multiple rounds of approval and review, a lean persona should suffice. Capture the important behavioral and psychological details, then spend more time on the design and iteration.

Quick UX User Research Tips

1. **Conduct online research** — by using Wikipedia, newspaper articles, blog posts and other sources

2. **Validate with co-workers** — Whether it's budget or confidentiality concerns, sometimes you can't interview outside people. In that case, build some quick personas based on web research (and any existing analytics), then validate them with coworkers who match thhttps://maze.co/guides/user-personas/e profile. Interestingly enough, some large companies like Apple use this approach .

3. **Check out competitors** — Take a deep dive into competitors with similar audience and deduce usability best practices, content strategies, and even develope design questions (and subsequent user scenarios) without speaking with any users.

What Should be in User Persona

A user persona template you should include the following information:

1. Persona name

2. Photo

3. Demographics (gender, age, location, marital status, family)

4. Goals and needs

5. Frustrations (or "pain points")

6. Behaviors

7. Bits of personality (e.g. a quote or slogan that captures the personality)

Judy, Director of UX
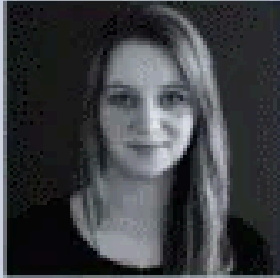
- Recently joined a global bank
- 8 years of UX experience
- Focuses on enterprise products
- Leads a team of 10 designers

- Legacy systems prevent innovation
- No standard design process leads to chaos
- Difficult to attract talent amidst competition
- Lack of buy-in for UX leads to resourcing problems
- Waterfall process prevents collaboration
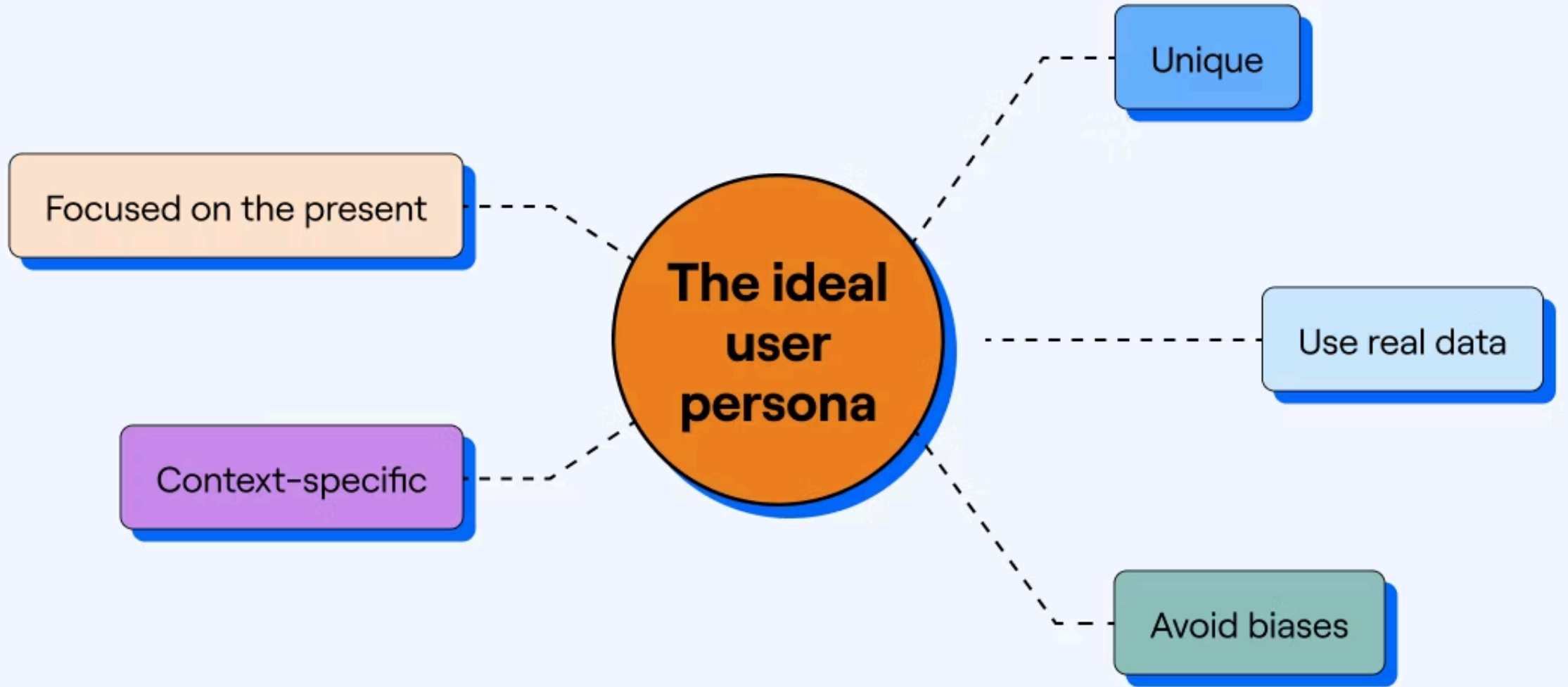- Lack of visibility into remote designers' projects

Tasks & Behavior

- Stays up to date with UX best practices
- Creates an overall vision, then dives into select projects
- Holds 1-hour weekly 1:1s with direct reports
- Holds up to 8 daily meetings (70% of work day)
- Sets OKRs and tracks progress for all direct reports
- Resolves issues between designers, devs, stakeholders
- Holds weekly department design critique

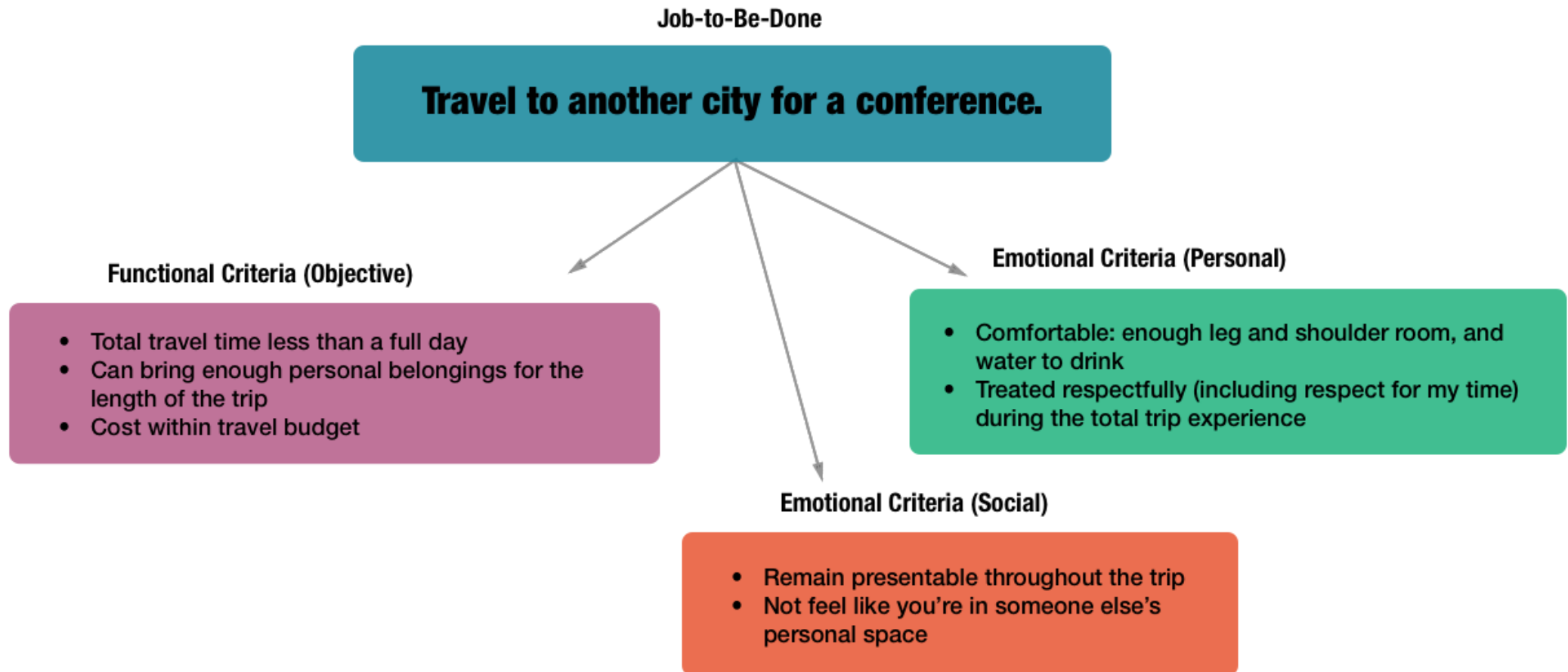## Goals

- Create a consistent UX across suite of 5 products
- Transform culture from engineering to design-driven
- Ensure happiness and job satisfaction of designers
- Deliver great products on schedule
- Meet monthly business metrics set by VP Product
- Establish herself as UX thought leader in company

The ideal user persona

- Focused on the present
- Context-specific
- Unique
- Use real data
- Avoid biases

maze

Alternative: Jobs-To-Be-Done Framework

Job-to-Be-Done

Travel to another city for a conference.

Functional Criteria (Objective)

- Total travel time less than a full day
- Can bring enough personal belongings for the length of the trip
- Cost within travel budget

Emotional Criteria (Personal)

- Comfortable: enough leg and shoulder room, and water to drink
- Treated respectfully (including respect for my time) during the total trip experience

Emotional Criteria (Social)

- Remain presentable throughout the trip
- Not feel like you're in someone else's personal space

Jobs-To-Be-Done Framework

Jobs-to-be-done are typically summarized in a single sentence describing what the user needs to accomplish, and any important context that might impact this job (in this example, work travel for a conference, rather than vacation travel). Jobs-to-be-done also typically include some information on the objective, functional success criteria as well as the subjective emotional success criteria that cover what counts as a good experience. The emotional criteria are often broken down into two levels: personal criteria and social considerations.

See also:

https://thispersondoesnotexist.com/

Links

- Personas – A Simple Introduction. https://www.interaction-design.org/literature/article/personas-why-and-how-you-should-use-them
- User Persona Template. https://docs.google.com/document/edit?id=1ipyqFwuog3QnwBX-HdWh03jDT3X-GJ2yImbvVJ9MSys&hl=en
- Putting Personas to Work in UX Design: What They Are and Why They're Important. https://xd.adobe.com/ideas/process/user-research/putting-personas-to-work-in-ux-design/
- The Story of Spotify Personas. https://spotify.design/article/the-story-of-spotify-personas
- UX Personas are useless. Unless created properly. https://uxmag.com/articles/ux-personas-are-useless-unless-created-properly

Thank you!