

Putting Personas to Work

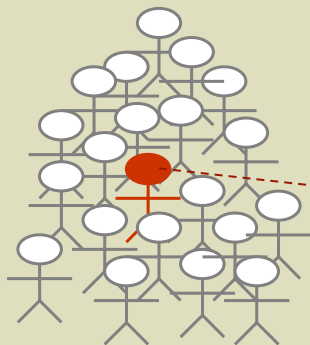
Putting Personas to Work: Improving Your Scenarios, Reviews and Usability Testing with Personas

STC Rocky Mountain
January 19, 2006

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Why personas?



Personas help us understand users, not as part of a group or a demographic, but as **individuals** with a history, goals, interests and a relationship to the product

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Usability depends on the point of view of a user



Toni



Son, Marcus



Husband, Jason

Toni is a young mother with a hectic life, with her job in a local shop, husband, home, and most of all her son, Marcus, a two-year-old bundle of activity.

She usually plans her family vacations, and makes all of the travel arrangements.

Usability depends on the point of view of a user



Jerilynn



Daughter Kimberly
graduating from
college

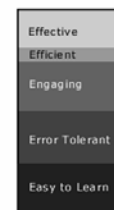


Grandkids Tom
and Jerome

Jerilynn works in the passport office in her county. Much of the work is routine, but she enjoys helping people, and hearing about the trips they are planning.

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Different users may have different usability requirements.

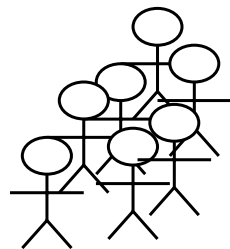


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Typical demographic profiles only give us a little bit of information

What does this information tell you about these people?



- Ages 30-45
- Well educated
- 45% married with children
- Over half use the web 3-5 times a week
- 65% use search engines

And how would we use this information to make design decisions?

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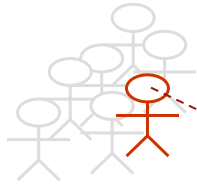
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When we can draw on a richer portrait, we can make better design decisions



Elizabeth

- 35 years old, married to Joe, has a 5 year-old son, Mike
- Attended State College and manages her class alumni site
- Uses Google as her home page
- Last used the web to find the name of a local official



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Elizabeth: Expert Searcher

Goals:

Information I can use
Answers to specific questions

Typical Questions:

Tell me something new
I want the latest!
I need <this> information.

Top Usability Needs:

Efficient: Give me a search box and I'll tell you exactly what I want

Effective: Give me accurate, reliable, up-to-date information

Information Seeking Styles:

Find: Specific question or keyword

Query: What's new about....

Risks

Not interested in personalization or community features

Already knows the basics



"I don't stay on a site long if nothing jumps out at me"

"Where do I type? Here? We have to change that!"

For Elizabeth, the web is a vast library. She likes to keep up with healthcare information, and uses the web to do it. Starting from Google, her favorite search engine, she finds a collection of pages that look good and tries them until she finds one that seems promising.

She doesn't like a lot of personal stuff on the web - testimonials, kids, interactive tools don't interest her a lot - but she does have definite ideas about how it should work

Needs:

- Targeted information at the right level of detail
- Search box or ways to reach information directly

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Putting Personas to Work

Personas are a portrait of a person who might use your products



ABOUT GEORGE

- Senior Occupational Therapist working in a large NHS hospital
- Highest Education level: Diploma in Higher Education
- Age 44

PERSONAL GOALS

Seeking promotion; wants to find out 'how to be a manager'
Wants more 'professional recognition'

INFO SEEKING AND WEB HABITS

IT literate - uses the web at work and at home for "fact checking" and finding out about sport.

USABILITY NEEDS

Efficient - wants the right answer in a short space of time.

GEORGE

"Professional updater"
Enquirer

23 years ago, George completed his Diploma in Higher Education and qualified as an Occupational Therapist. He is now a senior Occupational Therapist, is married with 2 daughters - the eldest is now in her second year at university; the youngest is 16 and still at home.

Most Occupational Therapists that George now works with are qualified to degree level. For the last couple of years, George has been applying for various posts at a higher grade without success. He feels that his lack of a degree is letting him down although he doesn't approve of OT being a degree level profession. Both his and his wife's salaries are modest (George is earning around £23,000).

Hypothetical...

... Not real

Archetype

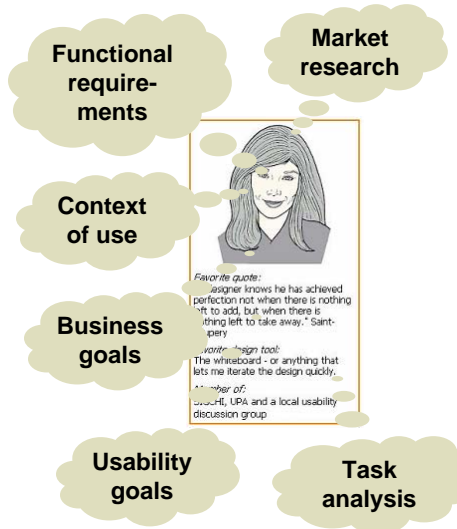
... Not stereotype

Specific

...Not average

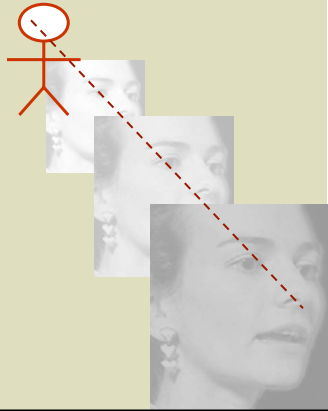
Personas help us meet challenges in designing for usability

1. Hearing users at all
2. Making information useful
3. Seeing individuals
4. Communicating clearly



Putting Personas to Work

Creating Personas



Personas are created from user research and market demographics, combining quantitative data with qualitative insights

Personas are created from user, market and demographic research

Job or role: tasks and activities

Frequency: daily use or specialized need

Context: relaxed or under pressure

Choice: compulsory or independent



Favorite quote:
"A designer knows he has achieved perfection not when there is nothing left to add, but when there is nothing left to take away." Saint-Exupery

Favorite design tool:
The whiteboard - or anything that lets me iterate the design quickly.

Member of:
SIGCHI, IFA, and a local usability discussion group

Familiarity: old friend or new visitor

Trusted, unknown or even mistrusted

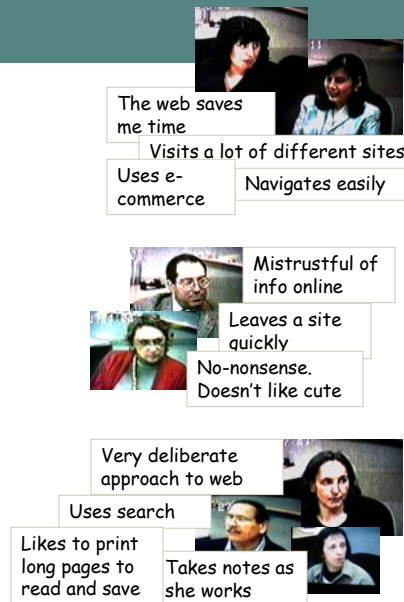
Deep knowledge or new subject

Relationship: insider, client/vendor, peer

Putting Personas to Work

Personas let us find different ways to think about the audience

- Look for similarities in:
 - Interaction styles
 - Personal characteristics
 - Patterns in attitudes or goals
- Look for similarities
 - By usage patterns
 - By domain knowledge or technical skills
- Look for shared stories
 - Attitudes
 - Language



Experts can provide valuable information to add to direct user research

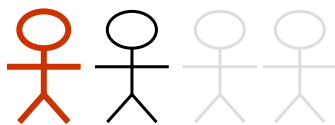
- **Sales** spends time in customer sites
- **Trainers** know what's hard and what's easy to learn
- **Field service and call centers** hear about real problems in the users' own words
- **Domain experts** remember what was it like in the field
- **Trade publications, user support forums, market research** all supply insights from the broader industry

Putting Personas to Work

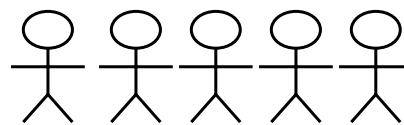
You can still create personas, even if you can't do any direct user research at all

- Gather existing knowledge
 - Read project definition or vision documents
 - Interview people with market or domain knowledge
 - Use existing user research or secondary research
- Create and test the personas
 - Go through the persona analysis and creation process
 - Review with stakeholders
- Use them cautiously
 - Do they hold up against new data?
 - Use them as a starting point for further research
 - See if they they hold up against new data

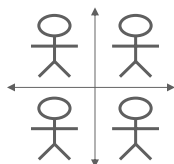
Personas can be related in several different ways.



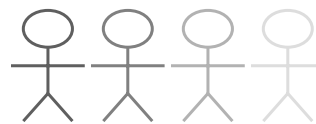
1. Strong primary and secondary personas, often based on tasks



2. A collection of personas, differentiated by key characteristics, or

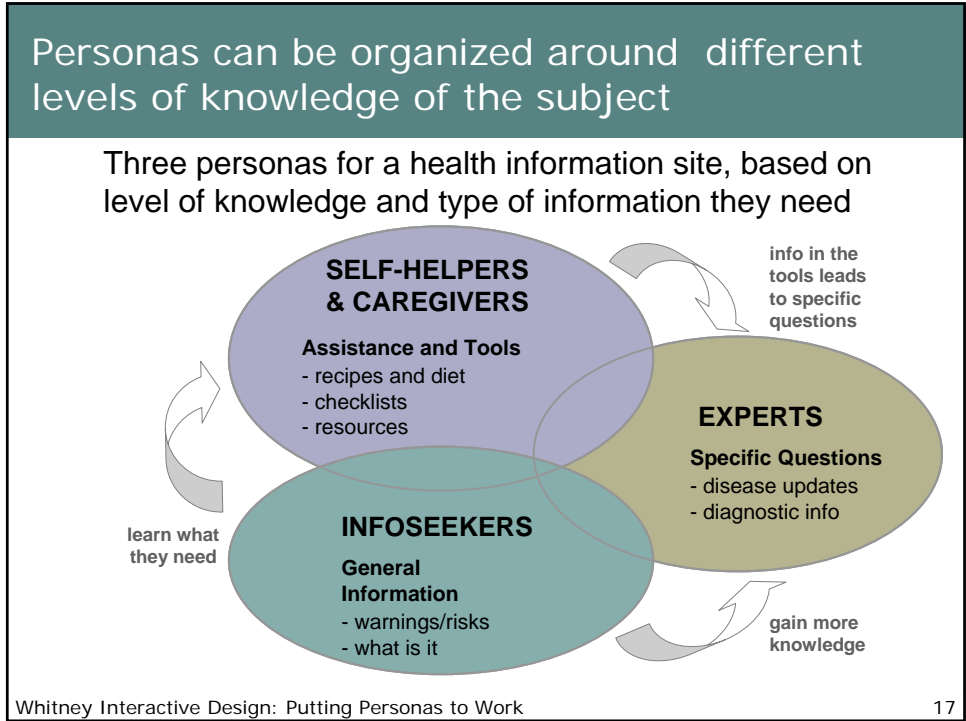



3. A matrix, based on two orthogonal variables



A spectrum, based on 1-2 strongly related characteristics

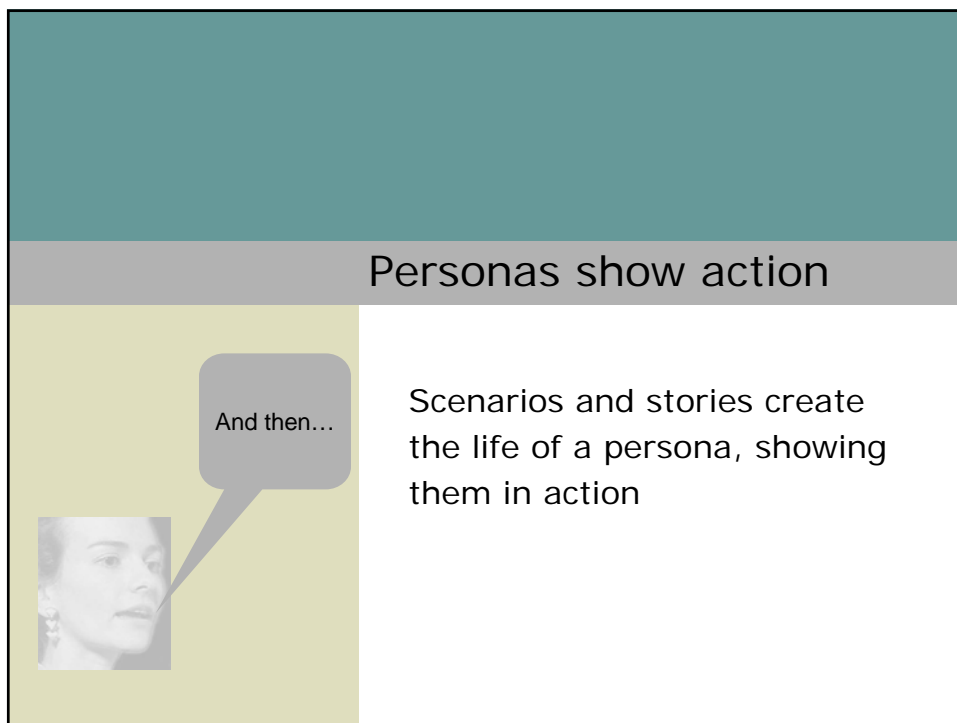
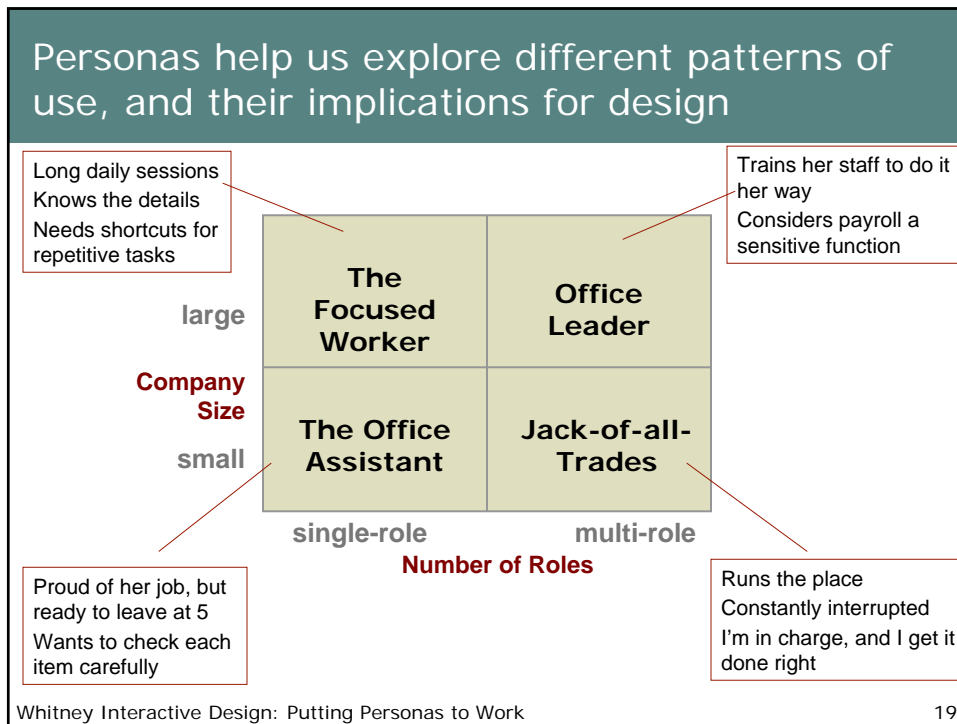
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 <p>Melissa InfoSeeker</p>	 <p>Laura Caregiver</p>	 <p>Elizabeth Expert</p>
<p>"I don't like to go backwards to go forwards"</p> <p>Goals: Looking for <u>new</u> information</p> <p>Typical Questions: What is <condition>? Am I at risk?</p> <p>Top Usability Need: Engaging - I can tell I'm in the right place by the amount and level of information</p> <p>Risks Curious - needs to be drawn in. Little sense of site loyalty</p>	<p>"I want to know how to help my husband"</p> <p>Goals: Looking for <u>helpful</u> information</p> <p>Typical Questions: What do I need to know about it? What are the next steps I should take?</p> <p>Top Usability Needs: Effective - I need resources, and the right information</p> <p>Risks Needs information she can act on</p>	<p>"I don't stay on a site long if nothing jumps out at me"</p> <p>Goals: Information I can use Answers to specific questions</p> <p>Typical Questions: Tell me something new I want the latest! I need <this> information.</p> <p>Top Usability Needs: Efficient: Give me a search box and I'll tell you exactly what I want</p> <p>Risks Already knows the basics</p>

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Putting Personas to Work



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Personas tell stories that reveal patterns of use

- They...
 - Present a coherent vision of the world
 - Store and transmit knowledge
 - Help organize facts in new ways
- Stories help us share information, vision, and values



Stephen Denning - www.stevedenning.com
Keynote Speaker – UPA 2006

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Stories communicate efficiently.

Tanner was deep into a game - all the way up to level 12 - when he got a buddy message from his friend Steve with a question about his homework. He looked up with a start. Almost bedtime and his homework still not done. Mom or Dad would be in any minute...

The Tanner persona and scenarios are based on work in
The Personas Lifecycle by Tamara Adlin and John Pruitt

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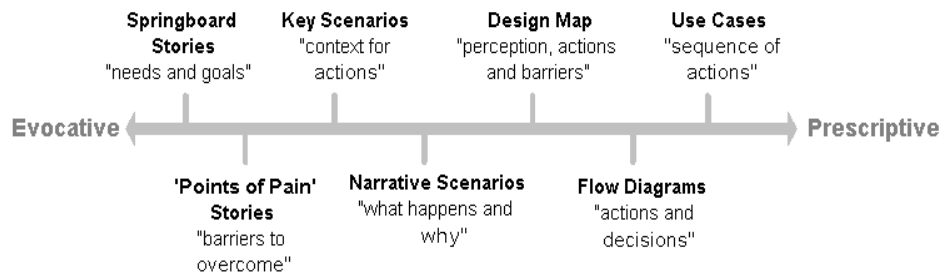
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Stories and scenarios help us imagine how a persona will use a product.



Stories from the personas can spark design ideas

Our products have different names in different countries, so it can be hard to manage international customer service.



Let's think about how we could make it better. What if it went something like this...

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Use personas to explore scenarios

Mary was filling in on payroll while Kathy, the office manager, was away. On Thursday, Kathy left her a message to remind her about some special bonus checks for that week.

Mary had not used the payroll program for a while, and only remembered that special checks could be difficult. Reading the post-it notes on the wall next to the computer, she scanned for instructions, and was relieved to find one for bonuses.

Following these brief notes, she found the right screen and puzzled her way through the on-screen instructions. Moments later, the missing checks were rolling out of the printer. As she breathed a sigh of relief, she made a copy of the checks to show Kathy when she returned - just in case.

Look for problems suggested by the scenarios and brainstorm design ideas to solve them

■ In this scenario:

- The task is difficult
- Unfamiliar users may need to complete it because the task cannot be deferred
- Primary users make themselves cheat-sheets to help remember functions



■ Design Ideas:

- Add a feature to allow primary users to add "if you need to..." instructions for replacements
- Use a wizard to walk users through the task
- Be sure the wizard has a checklist for the complete task - can users add their own procedural notes?

Putting Personas to Work

Personas keep design work grounded and 'comment' on design issues

- Use personas to keep work connected to real people
 - Design, plan or write for the personas, making sure a new design works for each of them
- Bring personas to design sessions
 - Use the personas to work through design problems
 - Role play to explore differences in how the personas react to different designs
 - Consider not just what they would do, but how they would prefer to do it



Keep up with me...

- "Of course I know it's a machine, but you do want it to know..."
- "You ask for one thing, and you get all of this."
- "We're already in 'stroke.' Will that stay, or will I have to add it..."

Personas review



Personas can guide reviews, giving them more validity and helping avoid personal opinion



Putting Personas to Work

Review personas with stakeholders, especially those who have good contact with users

- Review them with others who meet real users
 - Do sales or support staff recognize them?
- Review them with user or internal business stakeholders
 - Do they recognize themselves?
 - Do they recognize their colleagues?
- Test them against market segments
 - Do they match, or at least make sense as relating to the same people?

Do they “work” as characters and match the storytelling test for:

Coverage
Coherence
Uniqueness
Goodness-of-fit

Review layouts and information architecture



GEORGE
“Professional updater”
Enquirer

SCENARIO

George has set himself a target of getting a plan together within a few weeks. He is looking for how to get a degree; keywords are ‘management, health, occupational therapy’. He is at home in his study with a beer.

WHY DO THEY VISIT THE OU

George saw an advert for the OU on ‘Public Servant’ online.



Open University, Four Portals Strategy Review

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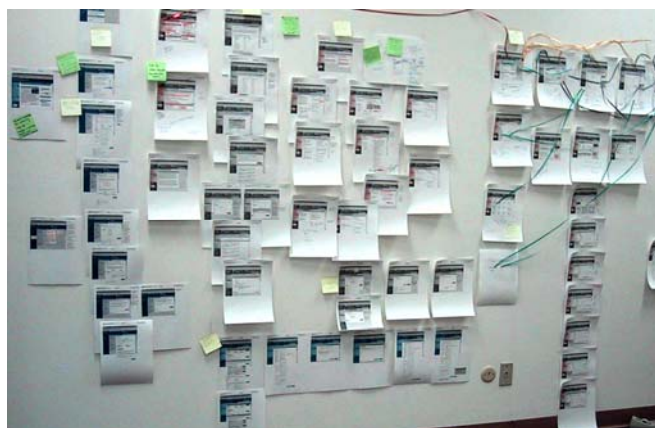
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Be sure that every persona has a successful path to critical information

SITE WALK-THROUGH WITH PERSONAS – 23 JUNE 2004

Persona	First Click	Use of Search	Path in Site	Summary
Ruth “The learner” Student (~60% of traffic)	Student Home (login) Or Studying at the OU	Not likely to search	<ul style="list-style-type: none"> From OU Home Ruth chooses ‘Studying at the OU’. From there she either browses the subjects – Maths, Economics, Social Sciences and is once more enthused about study. Or she clicks ‘Talk to a person’ and finds out about events in her area. Alternative <ul style="list-style-type: none"> Ruth may start from Student Home where she tries Next course but is put off by the mechanical nature of the page. She goes into her qualification page and from there clicks through to more information about the BA/BSc degree. 	Generally successful Although a current student Ruth is in many ways like an enquirer. Success depends on her finding links that help her maintain a connection to the OU and be engaged for each course. We need to ensure that the site does not take current students for granted, and offers appropriate support even on the student home.
George “Professional updater” Enquirer (~30% of traffic)	Studying at the OU	Uses search only when browsing fails	<ul style="list-style-type: none"> From OU home page, chooses ‘Studying at the OU’ He then clicks into Health and Social care and is a bit confused by the apparent richness of the offer. He tries Management and eventually comes across the BA/BSc degree which talks about flexibility of subject matter which appeals to him. He also notices and navigates to the Credit Transfer information – he may be able to count his DipHE towards the degree. 	Successful. There are enough keywords on the page to attract George and interest him to read more. Lateral links that offer a variety of options are important for success in answering any of a variety of questions.

Personas can “walk the wall” to show paths through a site or application



What are the most-used paths? Are there paths that need to jump across the information hierarchy?

Putting Personas to Work

Personas improve expert reviews

Scores on heuristics for Edith and Matthew for news sites:

Ratings		Edith			Matthew		
		observations	total	percent	observations	total	percent
No problem	4	8		12			
Minor hindrance	3	12		2			
Total for 4 & 3			20	37.0		14	38.9
Serious problem	2	20		19			
Task failure	1	14		3			
Total for 2 & 1			34	63.0		22	61.1

Table 2. Sample data table

Designing Web Sites for Older Adults: Expert Review of 50 Web Sites
 – Ginny Redish and Dana Chisnell for Amy Lee, AARP
www.aarp.org/olderwisewired

Even persona sketches can help focus reviews on use needs

Experienced Geek

This is the current typical New Egg user. He is young, techie and knowledgeable. Whether he's building the perfect system, checking out the new toys or doing a favor for a friend, he's always in the market for new gear.

When he hits the site, he knows what he's looking for

- The best price on a specific item
- The best product to meet a specific need

He's not concerned with subtleties or pretty graphics – just get him the information he needs ... and then get him the products as fast as possible.

He needs a user interface with:

- Fast paths to products, with all the information in one place
- All of the technical details... all of them
- An easy way to store research, so the final purchase is easier.

Online Shopper

This user is an experienced online shopper. Amazon sends her Christmas cards, and she knows how to find the best airline fares. She's way over being nervous about her credit card or e-commerce security.

The one thing that does scare her is buying e-gear. Why can't the computer and electronics industry make fewer products and give them easier to remember names? She used to think she knew this stuff, but she still remembers when she bought the wrong graphics card --- and couldn't return it.

She likes being offered advice – as long as it is reasonable, and actually helps.

She needs a user interface with:

- Easy-to-read information about each product (on any page with product info)
- Information about requirements, warranties and other policies in clear, plain language
- Good pictures to help her recognize products she has seen in an article or store

Tentative Shopper

This user is a more general consumer. He is likely to be looking for consumer electronics or computer accessories, not parts to build his own machine. He's a little embarrassed about how little he knows about electronics, but this only makes him a little angrier when sites don't give him the information he needs.

What he really wants is to ask his friends, but you can't do that forever – and even then, he has to get online and find what they recommend.

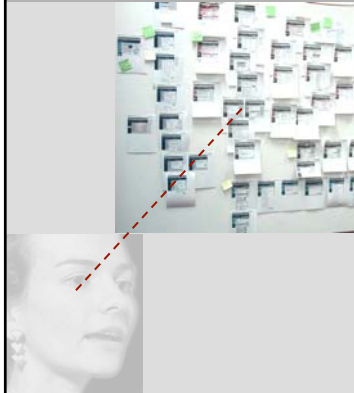
He needs an interface with:

- Guidance that doesn't make him feel foolish
- A way to ask questions, or find products without part numbers or too precise language
- Support in finding compatible products (or avoiding incompatibilities)

From a comparative review of technology shopping sites

Putting Personas to Work

Personas evaluate



Personas help with usability testing by providing demographics for participants and test scenarios

Personas should match usability participants

- Current job
- Prior education
- Web/technology use
- Age
- Goals



ABOUT GEORGE

- Senior Occupational Therapist working in a large NHS hospital
- Highest Education level: Diploma in Higher Education
- Age 44

PERSONAL GOALS

Seeking promotion; wants to find out 'how to be a manager'
Wants more 'professional recognition'

INFO SEEKING AND WEB HABITS

IT literate - uses the web at work and at home for "fact checking" and finding out about sport.

GEORG
"Professional Enquirer"

23 years ago, (Education and He is now a se with 2 daught year at unive home.

Most Occupati with are qual couple of year posts at a hig that his lack although he d level professio modest (Georg

Problems recruiting may mean problems with the personas

Putting Personas to Work

Personas scenarios become usability test scenarios

Scenarios supply tasks and context descriptions for usability tests

Walk personas through the tasks to test the prototype

Match participant and persona actions and paths to test design assumptions

Every Thursday, lorem ipsum dolor ipsantio



Then, she lorem ipsum dolor manent and consueitor

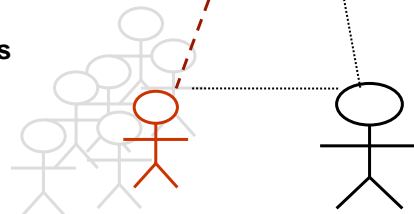
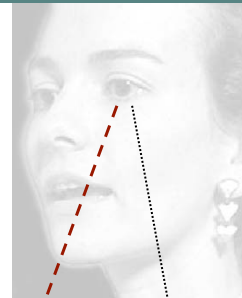
Sometimes dolor, lorum pusum and manent



When lorem ipsum dolor, she manent and consueit

Personas are a way to communicate

- **Within the design group**
 - Build consensus in creating the personas
 - Stimulate design discussions
- **Within the development group**
 - Explore alternatives and understand trade-offs
- **To managers and other stakeholders**
 - A vision of how the product will be used by real people



Putting Personas to Work

About Whitney



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Whitney Quesenbery is a user interface designer and usability specialist with a passion for clear communication.

She is an expert in developing new concepts for product designs and has produced award winning multimedia products, web sites, and web & software applications.

Whitney is past-president of UPA - Usability Professionals' Association and is a leader in the STC Usability and User Experience Community.

Before she was seduced by a little beige computer into the world of usability, Whitney was a theatrical lighting designer on and off Broadway. The lessons and stories from the theatre stay with her in creating user experiences.

Reading Matter



Dimensions of Usability
in Content and Complexity
eds. Michael Albers, Beth Mazur.
Erlbaum, 2003



Personas and Narrative
in The Persona Lifecycle: Keeping People in Mind During Product Design
by John Pruitt & Tamara Adlin
Morgan Kaufmann Press, 2006

More articles and publications on my web site:
http://www.wqusability.com/articles/personas_storytelling.html

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