



The Persona Process Getting to know you, our user

“Connect with your user and be meaningful to them.”

Look around you. Everyday, you use a multitude of products that help you live your life. From websites to cell-phones, good products share one thing in common. They ‘get’ your needs. They help you do things better, more efficiently or in the case of a great video game, kill time having more fun! So how do designers figure out just what you need? They find ways to get to know YOU. They learn to understand your needs and empathize with you.

What is a Persona

There are many ways to understand user needs, such as usability testing, focus groups, interviewing users, discussions with business stakeholders, and conducting surveys. With personas, designers take all this information and create the archetypal users to direct the vision and design of a solution.

A persona is this distilled user archetype that becomes the touch-point and validation tool for decisions about product features, navigation, interactions, and even visual design. By designing for the archetype—whose goals and behavior patterns are well understood, we build the end-result which will satisfy the needs and goals of the user group that is represented by the persona.

Benefits of Creating a Persona

End religious debates.

You and I sit down to brainstorm on what the next big widget should look like. I tell you what I like, and you tell me what you like. Great. Now what? I may ‘like’ something you ‘hate’. How do you prove to me that what I like is not usable for what we are setting out to build? Bringing the users who will actually use our widget, and learning their needs, helps us validate our decisions against something meaningful.

Buy-in across the team.

Everyone from the CEO of the company funding the building of the widget to the developer who will actually build the product, must see eye-to-eye and look to solve the same problems. Having developers see the rationale behind designs is important. With a persona firmly planted in their head, they can identify with hypothetical archetypes. This means they are now not just building code. We can have meaningful conversations and talk about “what John would do” or “whether Jane could understand” some dialog box.

Validation means less expense.

Old way of doing things: Build a widget, let users test the built widget, and then repair what did not work for the user. New way of doing things: Get into user’s head and figure out their goals, and also get a sense of their technical capabilities of what they would find usable. Build widget with this user in mind. End product is now modelled on user behavior so it will function more naturally for the user. We eliminate the testing phase entirely if users are brought into the picture early on.

Persona Design Process

1) Ask Questions.

Learn from those who know best. And no one knows the business better than the business owner. Take the time to understand business needs. At the same time, get some unbiased user feedback about the current environment or system. Most often we rely upon a combination of the in-person interviews, phone interviews, surveys, polls and contact forms to get us the information we need to get a good idea of who we are designing for and what their pain-points are. We know we have started to get into the head of our target user, when we can start to predict their responses to our questions. Time to stop asking questions!

2) Define Behavior & Demographic variables.

Establish a set of behavior variables based on the business domain and user experience that has been captured. Example: “price-driven” or “quality driven” could be behavior variables for an e-commerce project. Demographics can play a less important part than behavior variables unless the demographics influence behavior. For example, a teenager may have a different motivation to search for music online than their parent.

3) Look for patterns.

Patterns are where most of the users that we have polled, cluster around a behavior variable. Clusters of attitudes and behaviors can make up different personas. There is no ideal number of personas, but it is important to make sure there is a logical fit between each pattern, and that the persona is believable. Usually a set of 2-3 personae is sufficient to target the various audience groups identified.

4) Pump life into the Persona.

A set of patterns does not make up a persona. To be useful a persona needs to be believable, human and real enough that everyone in the team will understand and empathize with this person. Add narrative to weave the patterns into a description of who the persona is. What do they do for a living? What are their reasons to come in contact with the project in question? Put in enough details to get a sense of their lifestyle without making the persona bloated and lengthy. Good, useful personae can fit on one page.

5) Define Goals

To really understand the motivations of our new persona, it's important to identify the goals that drive them. Goals are different from tasks as they are the end-target while tasks are what we do to achieve those goals. Goals can be achieved in a multitude of ways, and we will find the best way to help our persona achieve their goal later in the design process. For now, we want to identify their life, experience and end goals to give us a clear target of what success looks like for our target persona.



Life goals:

What drives the persona? Achieving this will make her feel successful (less important for most projects).

◀ Balancing family and career well, retiring rich, becoming self-employed could all be life goals.

Experience goals:

How do they want to feel while they use the product or system we are designing (not feel stupid, could be a very real example of a experience goal when using a complex digital interface).

End goals:

What the persona wants to leave with when they finish using the interface. A tangible item such as a receipt or an intangible goal such as “know more about XYZ” could be examples of end goals.

Anatomy of a Persona

Shown below, is an example of a persona that we created for a usability review of a website that helps people incorporate their companies in the US.



User Profile # 1: Anita Robson

Age: 35

Occupation: iPod Accessory Designer

Single

I like being my own boss, except that I am very hard to work for!"

Life Goals: To be recognized as a force to be reckoned with in the world of fashion

Experience Goals: To know that she is getting the best possible information, that is targeted to her specifically

End Goals: To have the information necessary to know all steps necessary to incorporate

Until 2003 Anita had been working as a store manager at a Gap store in New York. She had always been interested in fashion design and wanted to go back to school and take some fashion courses. However, money was tight. So after a year of learning to sew by making a few knicks and knacks for herself and friends, she realized that she could do what she loves (fashion) and still make a living.

The iPod sells like hot cakes, and what better way to start out, then by making trendy, fashionable accessories for the device! She started out by getting a loan from her dad, making samples of products she wanted to sell, and advertising in local newspapers and fairs.

At this point, Anita has been in business for herself for little over a year and things are getting a bit out of control. Business has been good, and her iPod covers and bags are selling well and have developed a loyal following of fashionistas. But it's a story of the misery of riches. Anita has no time for herself, and she has had to hire two people to help her get product out the door. Money is good, but the overhead of having to manage a business and be creative at the same time is getting challenging.

Also till now Anita has worked from home, but is contemplating buying a small workshop/storefront for her business. Making money is fun, but it's time to get serious, hire an accountant and get finances in order. Her friends tell her that she should also look into getting incorporated, and make things "legit". It's time to find out more. If only she had the time to do some research!

So how did we create this persona?

We conducted one-on-one interviews with potential clients of the service, did some phone interviews and polled previous clients to figure out the key audience groups. The narrative above captures the following patterns that we identified for one of 3 persona types. Anita is the persona that represents the "New Entrepreneur" audience group.

- 1) First time business owner
- 2) Small home-based businesses, can't afford expensive legal advice
- 3) In business that is growing
- 4) Typically been in business just over a year
- 5) Does not know much about how to incorporate
- 6) Busy working life, lot of multi-tasking

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