

## Personas: Designing for Real People

Personas encapsulate in-depth knowledge of your target customers and put it to work for you.

Personas are fictitious, specific, concrete representations of target users<sup>1</sup>. They provide timely, easy-to-understand and remember information about users.

Personas can guide effort throughout the development lifecycle and provide value for varied teams and roles e.g., Product Managers, Producers and Designers from planning through requirements gathering to design, IT staff during implementation and testing and marketing staff as a stimulus to create marketing strategy and communicate it through brand and advertising.

The key reason to create and use personas is to generate a shared, consistent understanding of the user amongst the team(s) which design and implement a product or service. Without this understanding the product or service invariably fails to meet the needs, goals and desires of target users because it partially satisfies all possible target users and fully satisfies none. This has a direct, negative affect on customers and on company profit.

This White Paper contains five tips that will assist you to gain a clear understanding of what personas are, when it is worthwhile to use them and how to get started to create them. It provides case studies, summary examples and guidelines.

### **Seeding the design process – Case Study**

In late 2006 a leading company in online recruitment decided to undertake some in-depth qualitative research with its advertiser customers. The aim was to understand the varied contexts and nature of advertisers' work and their recruitment and selection processes in as natural a manner as possible.

This research would inform the design and development of an advertiser application associated with the company's website.

A sample of advertisers was recruited based on the company's customer segmentation and personas were chosen as an appropriate tool to make sense of the research data - a diary study completed by participating advertisers, contextual enquiry and in-depth interviews.

The research and persona creation was undertaken by an external consultancy which had an on-going relationship and strong knowledge of the company. Close liaison and sign-off points between stakeholders and the consultancy e.g., agreed interview questions were vital to the success of the effort.

The personas were communicated to the internal design team and other stakeholders in a narrative form which captured in rich detail how target advertisers do their work, what their pain points are and opportunities for the company to serve them better.

## Top 5 Persona Tips

### Tip 1 Know why you are creating personas

Understanding specifically what users do and why is critical for designers to actually design a product or service. This understanding is powered through qualitative in-depth user research. Research analysis and interpretation provide the insights which designers use to create initial concepts for a product or service which are then shaped and refined throughout the development lifecycle. Unfortunately, “the lion’s share of user insights tends to get lost somewhere on the road to a finished product.”<sup>2</sup>

Why do insights get lost?

In essence because users are complicated and varied and without an on-going and robust way of representing them during the development process, designers will design based on their own personal ideas about what a product or service should contain. In this self-focused design scenario both designers and developers will either create product/service features they *think* users would like or whatever is easy and cheap to build<sup>3</sup>

Personas have the potential to provide enormous value as credible, understandable and memorable representations of users for those who design and develop products and services.

*“.. personas should be more than a collection of facts. Personas should be compelling stories that unfold over time in the minds of your product team. We believe that successful personas and persona efforts are built progressively. Just as we get to know people in our lives, we must get to know personas (and the data they contain) by developing a relationship with them.”<sup>4</sup>*

#### Insights from outside-in - Case Study

In 2006 a large telecommunications subsidiary which brokered content between customers and consumers (end users) wanted to gain fresh insight into how its website was experienced by both customers and consumers and to validate potential initiatives for the future. Historically the content was offered in a print format whilst the website was a relatively recent format. In addition content was used to provide data cleansing services for targeted customers.

An internal research manager set up and “owned” the persona effort and three external consultants conducted the in-depth research with customers and consumers. The personas were created and presented jointly. This approach was productive as the internal manager offered internal context, issues and stakeholders and the consultants brought a fresh perspective and expertise in personas.

Once created the personas were presented to stakeholders in an engaging series of inter-linked scenarios which told the story of how their needs, goals and values, identified from the research, could be met in their future experience interacting with the website. Explicit connections were made between this experience, potential initiatives and brand and user values.

Creating personas proved invaluable because it provided the subsidiary with a comprehensive outside-in view rather than the partial views of each of the internal teams using the content. Synergies between the content formats and services and new revenue opportunities were identified eg it became clear that small-to-medium customers would benefit from the data services previously offered to large customers.

The persona effort assisted stakeholders to choose and prioritise what should and should not be done with the content in future based on understanding holistically and in detail the context-of-use of consumers and customers. It provided direction on meaningful innovation by identifying and exploring the values which were shared by both brand and consumer/customer and how these could be embedded and extended in the website.

## Marketing value personas

Personas also have significant potential as a tool for the Marketing team. At a minimum, personas capture rich detail about potential and existing customers which can enhance customer segmentation. This richer picture enables greater understanding of the total customer experience and emotional engagement with a product.

What marketing requires from personas is different however, from other roles in a very distinct way. Marketing need to understand purchasing versus designers and developers need to understand use. As a consequence persona effort is sometimes divided into 'design personas' and 'marketing personas'. The former tell the story of how a product will be used and the latter how a purchase decision is made.

Personas are most often created as design tools however they still have strong potential to add value for marketers e.g., Marketing can communicate the promise of a brand/product based on user goals, needs and pain points which are encapsulated in the personas and know that the promise will be delivered upon because the design has addressed those goals, needs and pain points.

### Misconceptions

Personas are not marketing profiles of users. Marketing profiles do not inform one about what users do (real-world behaviour and context of use) and why they do it (needs, desires, goals, memories and meanings they associate with experiences).

Marketing profiles are based on customer segmentation and quantitative market research providing information such as users' segment, age, income, work, hobbies and level of experience with technology.

Marketing profiles provide an excellent starting place for research prior to persona development.

## Tip 2 Planning for personas

Personas can be a wonderful tool but it is important to assess their value and fit for your own organisation and plan how to use them effectively before going ahead.

### How persona-friendly is your organisation?

It's easier to use personas in some organisations than in others. Here are five questions to gain a quick overview of how persona-friendly your organisation is:

1. Is your organisation structured for collaboration during product/service development e.g., cross-functional teams or is it mainly divided into silos undertaking specialised activities in a staged process with hand-overs between each?
2. To what extent is the user (current and potential) the primary focus throughout the product or service development lifecycle?
3. Does the team conducting qualitative user research also create the design for the product or service?
4. Are User-Centred Design (UCD) methods and techniques accepted and used regularly to develop products and services?
5. Does the team which is accountable for the design of the product /service drive the lifecycle effort?

If you answered as follows your organisation is persona-friendly:

- Collaborative structure,
- Strong user focus,
- Integrated user research and design team,
- User Centred Design methods and techniques accepted and used regularly,
- User research and design team drives the product/service lifecycle.

Organisations are of course, very diverse and the main point of these questions is to explore how much or little your organisation actually uses insights based on research into how and why people use its products/services to inform the development lifecycle.

### **What problems are you solving?**

There are many User-Centred Design methods and techniques and it may be more appropriate to use one or more of these rather than personas depending on your organisation's readiness.

To identify whether there is value in using personas in your organisation some questions to ask yourself include:

- How will using personas specifically assist my organisation and/or this particular product or service development process?
- What identified problems in the development lifecycle will using personas solve?
- How will I know the problems have been solved by the persona effort?

Personas are not a panacea and it is important to make a realistic assessment of the value they can and cannot create e.g., you may need to work with a simpler tool instead such as User Profiles, or begin with a very small, quiet persona effort to get some runs on the board.

### **Persona pitfalls to avoid**

If you have assessed personas have specific value for you it is worth learning from the experience of others about what to avoid before proceeding further. Four main reasons why some persona efforts have failed:

1. The effort was not accepted or supported by the leadership team,
2. The personas were not credible and not associated with methodological rigor and data,
3. The personas were poorly communicated,
4. The product design and development team employing personas did not understand how to use them.<sup>5</sup>

Armed with this knowledge use the 'Tip 3' checklist (outlined below), to minimise risk and plan for maximum return.

## **Tip 3 Checklist – how to create effective personas**

### **Leadership acceptance and support**

One team should "own" the personas to ensure their integrity, however ownership is a potential source of tension or conflict when a tool which is all about collaboration is created.

This tension can be managed by selecting an "owner" with the credibility to drive the process of creating and implementing the personas. This owner must have sufficient weight and relationship with the leadership team to get their buy-in and support. This will ensure that the cross-discipline teams or "silos" involved have confidence and the impetus to collaborate during the process of creating and using personas for the product or service development lifecycle.

### **Credible personas**

Ensure personas are created by people who are skilled at in-depth qualitative research and user centred design methodologies.

If there is an in-house team which provides user research, interaction and visual design services they are a logical choice for this work and, in addition, for the role of persona "owner" assuming they have a strong relationship with the leadership team. If there is no in-house team or the team is inexperienced with personas, it is advisable to start with a small pilot effort first, using external expertise to test the waters and mentor in-house team members.

One way to check the in-house team for suitability as the "owner" is to determine if they are held accountable for user (customer) experience by the organisation and whether they have primary responsibility for the design of products/services. If so they are ideal candidates. In contrast if there are overlapping roles and shared or unclear responsibilities it is probably best to position ownership in the team where product and service ideas are formulated and evaluated. The team may not have organisational weight but, at the least, they will create personas internally as a tool to translate research into early design concepts.

### **Communicate Personas Well**

Taking the appropriate scope of the persona effort into account the "owner" should create a communication plan and obtain a budget to showcase the personas initially and then to refresh, tailor and update the personas as the product or service development lifecycle unfolds.

## Use Personas Effectively

Identify how organisational context is likely to shape or constrain the persona effort and tailor activities accordingly.

Personas can be used in all sorts of organisational contexts; the key is to identify what effort is feasible from small to big including the option of a pragmatic evolutionary approach to allow for growth or pulling back without loss of confidence.

### Personas in a corporate context – summary example

If your organisational context is complex (large organisation with many products and services in a period of rapid growth) senior management has probably commissioned large-scale research into market segmentation and competitors to create coherence. The outputs of this research are generally enforced as an organisational standard and depending on how recently the research was completed this standard may be considered exclusive.

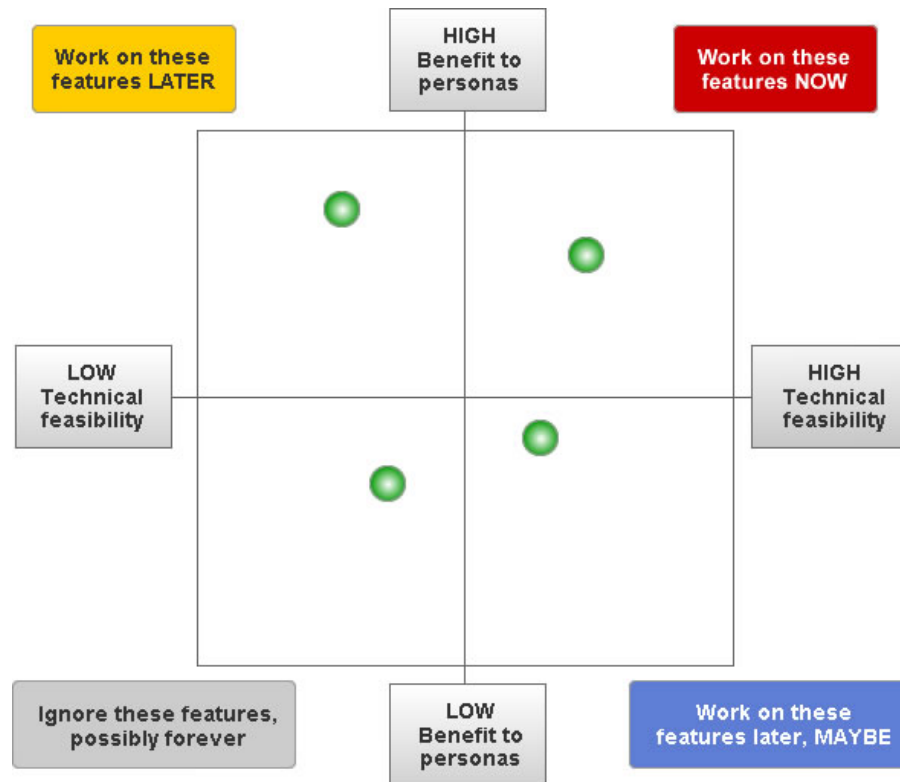
The market research may have included a high-level picture of users' needs that satisfies parts of your organisation however it is typically insufficient for design and development teams to do their work.

In this organisational scenario personas may be perceived as unnecessary extras which muddy the waters. This perception makes it difficult to present a strong case about the value of (and budget for) personas and to gain buy-in for their use throughout the whole product/service lifecycle and organisation-wide. Even though it is possible to successfully dovetail personas in with market segmentation the perception in the organisation about extras may be so strong that a small persona effort is needed initially and evidence of how the segmentation standard seeded persona development.

The second key for effective persona use is to create and provide easy access to implementation tools which directly assist members of design and development teams to use personas.

	Persona 1	Persona 2	Persona 3	
Weight	50	35	15	Weighted Sum
Feature A:	0	1	2	65
Feature B:	2	1	1	150
Feature C:	- 1	1	0	- 15
Feature D:	1	1	1	100

Persona weighted feature matrix. The features are listed in rows, the personas in columns. Each persona has a weight to identify its relative importance. Scores (2, 1, 0 or -1) are assigned for each feature according to how valuable or attractive it is to each persona. The weighted sums are the product of multiplying each score by each weight and then adding across the rows.<sup>6</sup>



Completed feature-value versus technical feasibility plot. Collaboratively arrange the features along the second axis (technical feasibility) without altering the value on the first axis (value to your target users).<sup>7</sup>

#### Tip 4 Use a persona framework or methodology

Apply a coherent framework or methodology to maximise your efficiency when creating personas and to increase their impact during use. This paper outlines two options.

##### Persona Lifecycle

Pruitt & Adlan's persona lifecycle is a highly practical framework to conceptualise, create and use personas. It consists of five stages similar to human procreation and development with each stage building on the previous:

1. Family planning – research and planning stage before creating personas,
2. Conception and gestation – translate research data and insights into a set of personas,
3. Birth and maturation – strong, clear communication for understanding, adoption and use,
4. Adulthood – personas are used in many existing processes and activities during design and development of a product or service,
5. Lifetime achievement & retirement – assess the effectiveness of the persona effort, decide about use and re-use after product/service launch.

Pruitt and Adlan take a very pragmatic approach to persona effort e.g., they state that each stage should be covered, but shortcuts can be taken within a stage depending on your circumstances. They view the persona lifecycle as complementing or enhancing existing processes and techniques in an organisation. In particular they see personas as complementing existing User-Centred Design techniques such as iterative evaluation of prototypes with users.

Overall they emphasise gaining acceptance with a wide variety of stakeholders and embedding the persona effort throughout an organisation. This framework is a fine resource if you are working inside an organisation in any role touched by the product/service development lifecycle.

### **Cooper's Goal Directed Design**

In contrast Cooper<sup>8</sup> proposes creating personas as part of the 'Goal Directed Design methodology'. This methodology was developed by Cooper and associates in their work as consultants providing design services to organisations. It is an exciting, focused approach to design which emphasises understanding users goals and motivations and uses iterative scenarios (narrative structure to describe and explore personas) to capture insights from user research and translate them into product design in a coherent way.

This methodology has a streamlined process e.g., they involve specific organisational stakeholders at key points during research and design depending on what action or role they play e.g., managerial decision maker versus a team member who needs to have empathy with users.

This methodology is focused on design rather than how personas can be broadly applied in an organisation. As a consequence it offers most value as a guide for action to those who are user researchers and designers.

### **Using the Cooper Method – Case Study**

Research done by Symplicit in 2007 with a large Telecommunications company looked to gain a greater understanding of how 'music' generally touched users' lives.

Initial exploratory research efforts were not only focused on any specific technology that was being used to listen to music by the key market segments (e.g., websites to download, PC at home or work, car radio / stereo, home radio / stereo, ipod, mobile phone, walkman etc); but also importantly sought to understand 'how' users interacted with music' on a day-to-day basis; 'where' they interacted with music, and 'why' they interacted with music - and how these learnings could be used to create future product opportunities for this organisation that tapped into users current needs and behaviours – therefore, were more likely to be successful as a result.

Research began with a series of contextual enquiry sessions across a range of the key market segments of interest, then moved into a diary exercise – that allowed focused day-to-day interactions with music to be recorded and relayed to the team.

Based on this strong exploratory research background and understanding, the Symplicit team was able to come up with a series of scenarios that effectively described to product managers and owners 'how' users interact with music on a daily basis, 'what' triggers initiated purchase or download of music, 'where' or 'when' they did this, and what were the current pain-points in the purchase process across web and mobile platforms that could be addressed to improve overall download and purchase of music to the current mobile and web platforms.

The design team then created several prototype examples of how the website and mobile experience needed to be changed and re-designed in order to better match users' goals and motivations for music purchase across these mediums.

The result was a 29% increase in sales for the mobile platform when the design went live. This was a significant improvement to a platform that was already showing high sales; and what this example really showcases is just how important user-based research and understanding is to good product design.

### **Which option to use?**

If you are likely to be the "owner" of personas created for your organisation and/or have responsibility for user research and design we suggest you explore both of these options in more detail. You may find it useful to visit Cooper's website at [www.cooper.com](http://www.cooper.com)

Otherwise we think the Persona Lifecycle is sufficient since it provides an excellent overview and plenty of practical ideas about how each role within your organisation can contribute to, and use personas, effectively.

## Tip 5 Turning Personas into Innovation

Innovation requires understanding and prioritising organisational choices based on a customer-centric view i.e., looking outside-in rather than inside-out. One source of innovation is knowledge about why we need to be or do something differently. Personas capture this knowledge and enable direct action to innovate during the product/service development lifecycle.

There is no magic bullet to turn personas into innovation in your organisation. It requires action – creating and using personas whether that is via an internal team, using hired consultants or some combination of the two.

There are however, some sign-posts of success. Using the Persona Lifecycle as a guide, successful personas evolve over time, not as a radical departure from their initial development, but rather as a living being, like you and me. The tell-tale signs are members of the development team(s) involving the personas in their decision-making and subtle changes to personas as team members interact with them.

The use of personas by Marketing is another success signpost. It signals that personas are not regarded as just another form of customer segmentation but rather as a useful tool for marketing strategy and communication. Personas can be used within existing tools e.g., in brand ladders to identify what values are shared by both customer and brand and explore ways in which these values can be embedded in the product or service offering now and in future.

### Multiple offerings and personas

Many persona efforts focus on a single product or service, possibly later versions of it or sometimes a related series of products. It is challenging to apply one set of personas to multiple products or services because personas must represent the target users and these are likely to vary for each product or service.

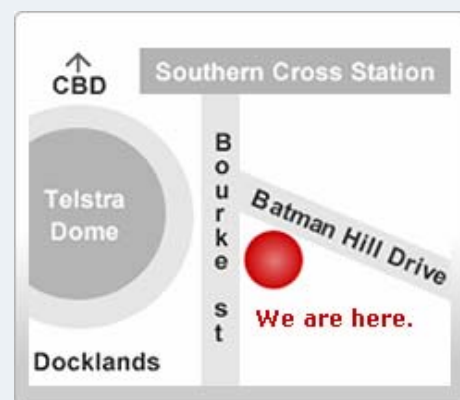
This is not to say that use of personas across multiple products or services is invalid. Personas could, for example, be useful to understand the relationship between multiple offerings by one company. If there is overlap between customers using the offerings i.e., customers use multiple offerings personas could be invaluable in determining brand architecture and communication. This understanding could be achieved after creating multiple sets of personas, one for each offering or alternatively by creating one set of personas for customers who use multiple offerings.

Symplificit provides consultancy services in customer observation that can assist you to gain insights for innovation. Drawing on our unique toolset of eye-tracking technology, usability lab and field research techniques we support your customer focus with relevant options for the lifecycle stage you are working on.

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## References

<sup>1</sup> Pruitt, John. & Adlin, Tamara. (2006). *The Persona Lifecycle Keeping People in Mind Throughout Product Design*. San Francisco, CA. Elsevier p.11

<sup>2</sup> Ibid. p. 9

<sup>3</sup> Ibid. p.7

<sup>4</sup> Ibid. p. 37

<sup>5</sup> Ibid. p. 39

<sup>6</sup> Ibid. p. 372

<sup>7</sup> Ibid. p.376

<sup>8</sup> Cooper, Alan. Reinmann, Robert and Cronin. David. (2007) *About Face 3 The Essentials of Interaction Design*. Indianapolis, Indiana. Wiley Publishers