Developing Personas

Understanding your users by developing personas

Before embarking on the development of a solution, it is important to understand the needs of your users.

Once you have established a good understanding of your users, you are equipped to identify the features and functionality that will make the system a success. Your understanding will also help you to enable a system design appropriate to users with varying skill levels and objectives.

A ‘persona’ is a fictional character – one that can effectively represent a major user group of your system or site. Personas act as ‘stand-ins’ for real users, and help guide the decision-making processes around system functionality and design.

They identify users’ motivations, expectations, and the goals or objectives that determine the behaviour that drives them. They bring users to life - by attributing to them names, personalities, and often photos as well.

Although personas are fictitious, they *are* based on knowledge of real-life users. Before personas are established and documented, research on users is undertaken. This ensures that the persona, once created, represents the end users - rather than representing the perspectives and opinions of those responsible for *preparing* the personas.

The use of personas brings many proven benefits, including the following:

- Users’ goals and needs become a common focal point for the team.
- The team can concentrate on designing a system appropriate to an agreed set, or pool, of personas.
- They are relatively quick to develop in comparison with, say, canvassing the entire user community – or even a large sample from it.
- By always asking, ’Would Jim (the persona) use this?’, the team can develop the solution appropriate to the needs of the wider user group - rather than endeavouring to develop a solution to meet the wish-lists of individual users.
- Design efforts can be prioritised based on the personas’ requirements.
- Disagreements over design decisions can be solved by acknowledging the personas’ requirements as the drivers for the decisions.
- To ensure the designs will be of optimal benefit to the intended users, they can be tested and validated within the context of the personas’ requirements.

Deciding on the most appropriate research method

In order to get the maximum value from a persona once it’s been created, it’s important to dedicate time, effort, and attention to identifying the trends and patterns of user behaviours -

in addition to users’ expectations and motivations – which collectively will provide the foundation for the personas’ development.

The most effective method for achieving this is the interviewing of real users. A good starting point with this is the preparation of a list or table of groups who will use the system. If the project is focused on the upgrade of an existing system, you may well consider existing users as well as potential users.

It is common for trends to become apparent after talking with 10 or more users. If, however, the needs of those within the user group differ considerably, it can become worthwhile talking with more.

Typically, there are three key methods for gathering the information required from real users: contextual interviews, individual interviews, and focus groups.

Each of these methods brings its own benefits to the research situation. Clearly defining your research objectives beforehand will be very helpful to deciding which of the three methods you decide to deploy.

Contextual interviews

These are carried out by observing the user at work. Within the context of their normal working environment, the user is asked questions by the interviewer – on specific areas on which they want clarity. Contextual interviews are recommended wherever possible - they are often the most appropriate method to deploy where an existing system is in place (eg, where the project’s focus is on a system upgrade).

Individual interviews

With this method, users are interviewed on a one-on-one basis. Typically, they are asked to answer a largely pre-defined list of questions. In addition to asking those that are pre-defined, in order to get the most from the interview, it is important to allow for flexibility, and to ask more probing ‘open-ended’ questions appropriate to the comfort level of both interviewee and interviewer. Many interviewees will happily and spontaneously elaborate on the information they are providing – particularly on points on which they have strong or specific opinions.

Focus groups

This method is one by which existing or potential users are brought together to contribute to a moderated discussion. As with individual interviews, it is important to have a pre-defined list of questions and topics to cover, or a script for the moderator to draw on. Once again, in an effort to maximise the information flow during the session, it is important to also allow for flexibility. It is important that the moderator is able to keep the group focused, and that everyone has the opportunity to participate.

If you’re not able to access real users, it’s recommended that you deploy a combination of the research methods that follow. Do try not to rely on a single method, but to integrate at least a couple:

- Interview business stakeholders who interact frequently with users. These people have a wealth of knowledge, and are already both aware and conscious of users' behavioural patterns.
- Review relevant market research, and where possible talk with the organisation's market research specialists.
- Deploy quantitative survey methods with users and business stakeholders.
- For a system that's in the public domain - a website, for example - talk with friends and family who are current or potential users. Although it's not considered to be a rigorous research method, this can be useful when deployed in conjunction with one of the other methods featured above.

Conducting the research

Once your method has been selected, you can begin to carry out the research. If you will be conducting interviews, it's advisable to allow for around an hour for each one. Thirty minutes will still reveal behavioural trends, if an hour isn't possible, but the resulting personas may not be as detailed as you'd like.

It's important to acknowledge that interviews with users are best conducted in the actual environment (the 'context') in which they will be using the system.

It's advisable to avoid asking opinions on the design of the system, or on what it is that your respondents want – not only can these lines of questioning distract from the focus of the research, they can result in the presentation of wish-lists that cannot be delivered, and in expectations that cannot be met.

It is more beneficial to gather information on the areas listed in the table below. The information can be gathered within two different contexts. There are slight differences between the two, which are dependent on whether the system is internal to the organisation or public-facing.

Internal System	Public-facing / External System
Basic demographics: age, job title, length of time in the position, length of time in the organisation	Basic demographics: age, job, family-related information, hobbies, and interests
Job responsibilities, and what a typical day involves	What a typical day involves
The tasks that take the longest, are the most critical, or are performed most often	Common questions or tasks in relation to the system's domain
Major frustrations with the job, and with the organisation	Major frustrations when trying to achieve goals related to the system's domain, eg, 'It's hard to read information about the products, because the text is really small'.

What the person likes the most about their job	What the person likes the most about the system's domain
The teams or people within the organisation that the person interacts with the most	Who the person interacts with the most when completing tasks
Skill levels relating to the job, as well as to technology	Skill levels relating to tasks, as well as to technology
How time-poor (or rich) a person is	How time-poor (or rich) a person is
Goals, attitudes, and beliefs: both conscious and subconscious	Goals, attitudes, and beliefs: both conscious and subconscious

You should prepare a list of (pre-defined) interview questions. Do, however, remain open to an alternative path of questioning if it will lead to the revealing of user attitudes and behaviours. It's not advisable to ask questions such as, 'What are your goals when using the system?'. Rather, you will need to coax the information from them by phrasing questions in a different way, such as ' What things frustrate you the most?', ' What makes a good working day?', and 'What will help you to do your job better?'.

It is worthwhile practising 'active listening'. Also, do be aware that 'open' body language, as well as frequent (where appropriate) eye contact, quickly build trust and rapport. Most importantly, do respect the opinions the user is expressing. Not only are they talking about *their* world - this is the world they bring with them when using your system. Showing them you respect them will go a long way towards instilling within them both trust and openness. Once you have gained their trust, users' true motivations, attitudes, and beliefs will be revealed.

Analysing research data and identifying the persona set

It is important to, on completion of your research, both review and organise the data you have obtained. Consider organising the information by way of the following categories:

- About this person:
    - Demographic information;
    - Relationship to the organisation;
    - Level of domain knowledge; and
    - Level of computer use.
- Goals and tasks:
    - Activities;
    - Task approach; and
    - Timing, order, and triggers for activities.
- Motivations:

- Influencers;
- Decision factors;
- Barriers;
- Expectations; and
- Social pressures.

- Attitudes and Needs:
  - Styles and terminology;
  - Trust or assurance needs; and
  - Information needs.
- Other observations:
  - Great quotes;
  - Environmental or other contextual information; and
  - Any other data points or observations.

Once the information has been organised and collated, you can endeavour to identify patterns to attitudes and behaviours. As you progressively list these patterns, clusters of attitudes and behaviours - that make up different personas - will materialise.

When identifying patterns and clusters, the following may well be helpful to getting the most from the data you have obtained.

Look for personal similarities in:

- Interaction styles;
- People with similar characteristics; and
- Patterns in task approach or goals.

Look for task similarities:

- By job function (job titles or tasks);
- By usage patterns – frequency and variability of use; and
- By level of experience – domain or computer knowledge and comfort.

Look for shared stories:

- Stories reveal attitudes and emotional factors.

For example, if the system in question is a travel website, one persona may be the frequent traveller: skilled in researching holiday destinations and finding the best package deals on offer. This is a persona motivated by keeping down the cost of each holiday, so that they can travel more frequently in the future. The persona's goal is one of going on as many holidays as possible.

Once you have defined these clusters of attitudes and behaviours, you are well-placed to ascribe a brief description to each persona, such as, for example, 'independent traveller', or ‘bargain hunter’. While there is no ideal number of personas, do try to keep the set small: four or five personas work well as effective design tools, whereas more than, say, ten personas may introduce the same level of confusion as that of a large user requirements document.

Documenting the personas

You can begin documenting the personas by adding details around the behavioural traits. From there, you can select the valuable details resulting from your research - such as the working environment, frustrations, relationships with others, skill levels, and some demographic-related points. Then, attribute both a name and photo to each persona - unless your organisational or team culture is better suited to more generic personas.

Regardless of whether you document your personas by way of a narrative or bullet points, the following should be helpful to the process:

- To maximise their effectiveness as communications tools, endeavour to keep your personas to one page in length. This will enable them to be referred to easily and quickly during design discussions.
- Do add the personal details, but don’t go over-board or you can easily lose focus.
- Do include goals for each persona.

Once your personas are documented, it is important to review them to ensure they have maintained their realism, and that they are true to the results of your research. Check that you have a manageable number of personas; if two appear to be close by way of behaviours and goals, you may be able to merge them into one. Finally, to ensure you have a polished and professional product, ask someone to review the personas for accuracy in spelling and grammar.