

10. Personas

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Plan for ISSD Lecture #10

Roadmap to the lectures

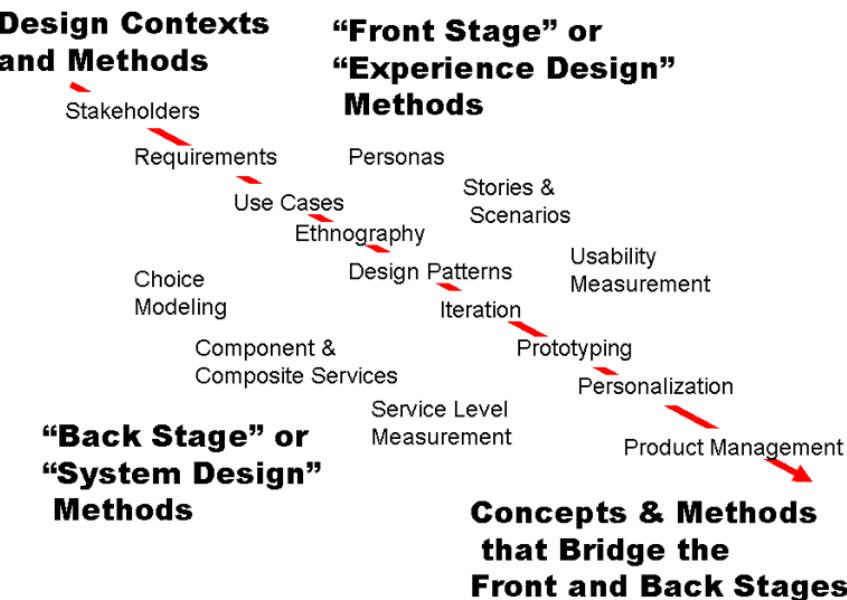
Stakeholders, users, and personas

User models and why personas work

Methods for creating and using personas

Problems and issues for personas

Course Roadmap



Stakeholders >> Users

You need a broad and comprehensive view of stakeholders: people who can affect the success of your service or product or system and who are affected by it

To set priorities and make design decisions, you need to understand the different perspectives and goals that these stakeholders have

The "users" or "customers" or "operators" are a subset of stakeholders, but because they are "primary" ones that directly interact with what you build you probably need to know more about them than other stakeholders

Differentiating "Users"

Not being explicit about "the user" also means that design decisions might be made on the basis of assumed qualities or attributes or goals that are incorrect

Not being explicit about "the user" makes it more likely that designers will project themselves into the user role, which is generally inappropriate

When they do talk about users, designers too often talk about "the user" as if all the people who use or might use a service or system are the same

Undifferentiated notions of "the user" ignore diversity in experience, attitudes, roles, and goals

"User Models"

We naturally and without explicit effort create mental models of people and the contexts in which we encounter them

We extrapolate or "run the user model" to shape our interactions and communications with people and predict their behavior in new situations

These models can be detailed and multidimensional enough that we can determine when someone's behavior is "out of character"

The accuracy of these predictions -- or at least their generativity -- is greater when the user model is more detailed

The Continuum of "User Models" (Grudin)

- Group stereotypes ("cultural differences")
- A fixed set of traits ("introverted," "honest")
- A changing set of traits
- Goals, plans, and expectancies ("striving to get through college," "saving for a vacation")
- Scripts for specific contexts or situations (how to behave in a restaurant, classroom, checkout line)
- Specific knowledge about a person (he went to berkeley, plays basketball, is married, lives in the mission district)
- A complex holistic image of a person

"Persona" is a Type of "User Model"

- A persona is a prototypical type of user
- It is concretely and precisely defined, with lots of detail so that designers can unambiguously refer to types of users
- A set of personas preserves important details or competing requirements that might be "washed out" if we focused on a single "average" user
- Personas create a common point of reference for different people and teams in the development process
- (The idea of personas is not new, but it was popularized by Alan Cooper in a 1999 book titled "The Inmates Are Running the Asylum")
- (You might need personas for stakeholders other than users, but we'll focus here on the design of "user" personas because they are most common)

The Benefits of Personas

"To communicate effectively, a designer must have a clear, cohesive understandable image of the product being designed and the user must be able to understand that communication" (Norman)

"Until the user is precisely defined, the programmer can always imagine himself as the user or allow the user to become elastic. A completely defined user persona is key to the suppression of any tendency for the developer to usurp or distort the user persona's role" (Cooper, p129)

A set of personas wards against simplistic contrasts like "novices" vs. "power users," "artists" vs. "techies," and "manager" vs. "worker"

Personas and "Traceability"

Personas can make explicit what would otherwise be hidden decisions about features, functions, and priorities

Personas can improve traceability (where did this requirement come from?) and impact analysis (who will care or be affected if we do this?)

This is an essential check on "feature bloat" where features are put into products because a designer thinks "they are a good idea" but not tied to any specific user's requirements

Examples of Personas

Personas in "iNaturalist"

(<http://courses.ischool.berkeley.edu/i213/s07/projects/naturalist/trac.inatura>)

- Where did these personas come from? Are they based on real data?
- Contrast "Adam Thompson" goals with those of "Ted Sinclair"
- How will "Adam" and "Ted" differ in their use of a web application for recording information about birds?

Creating Personas ("Intuitive" Approach)

Interview current or prospective users (after observing them if possible) to learn what tasks they are currently performing or would like to perform

Based on these interviews, determine the defining characteristics and goals of each interviewee, and the commonalities among them

Using these proto-personas and your common-sense notions of what will be required for your solution, create personas to capture the most important user types and their goals (there is not necessarily a 1-1 relationship between types of people you interviewed and personas)

Assign personal details to make them "more vibrant and memorable"

For each persona, determine the priority of each of the high level goals that emerged from your interviews

Typical Problems with Personas (Grudin)

Persona characters are often not believable because they are designed by committee or not clearly tied to the observations and interviews

Characters not communicated well

Personas are used as a discussion aid -- "Would Adam use this feature?" -- but no clear process for how they should be used by different disciplines at different points in design lifecycle

Insufficient high-level support and resources to mandate effective creation and use of characters

Persona creation takes so long that it "misses the window" to influence design

Improved Methods for Creating and Using Personas (Grudin)

Use market research and existing user research about actual or potential customer segments to determine which segments should be "enriched" into personas

Begin with the existing market data and research, and don't "enrich" until this foundation work has been incorporated

Develop "anti-personas" to make explicitly clear which types of people are NOT being designed for

Assign people to "own" each persona

Use standard documents as templates or metamodels to guide the collection and use of the persona source information and the personas

Validate and prioritize personas by using them to guide subsequent usability and market research

Foundation Document T of C

<p>Overview – Alan Waters (Business Owner) <i>Get to know Alan, his business, and family.</i></p> <p>A Day in the Life <i>Follow Alan through a typical day.</i></p> <p>Work Activities <i>Look at Alan's job description and role at work.</i></p> <p>Household and Leisure Activities <i>Get information about what Alan does when he's not at work.</i></p> <p>Goals, Fears, and Aspirations <i>Understand the concerns Alan has about his life, career, and business.</i></p> <p>Computer Skills, Knowledge, and Abilities <i>Learn about Alan's computer experience.</i></p> <p>Market Size and Influence <i>Understand the impact people like Alan have on our business.</i></p>	<p>Demographic Attributes <i>Read key demographic information about Alan and his family.</i></p> <p>Technology Attributes <i>Get a sense of what Alan does with technology.</i></p> <p>Technology Attitudes <i>Review Alan's perspective on technology, past and future.</i></p> <p>Communicating <i>Learn how Alan keeps in touch with people.</i></p> <p>International Considerations <i>Find out what Alan is like outside the U.S.</i></p> <p>Quotes <i>Hear what Alan has to say.</i></p> <p>References <i>See source materials for this document.</i></p>
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Persona Features Prioritization Matrix

	Persona 1	Persona 2	Persona 3	
Weight:	50	35	15	Weighted Sum
Feature 1	0	1	2	65
Feature 2	2	1	1	150
Feature 3	-1	1	0	-15
Feature 4	1	1	1	100
Etc.	-	-	-	-

Issues About Design and Use of Personas

How relevant is a designer's own experience in creating and using personas?

What is the relationship between use cases and personas?

How much detail should a persona have?

How much should this detail be based on "real" demographic, psychographic, or marketing data?

Should personas evolve during a design project, or should they be static?

A Designer's Experience is Relevant

Some people interpret the "don't think of yourself as the user" to mean that your experience isn't relevant when you design for other people

And sometimes you DON'T have much relevant experience (e.g., Nokia cell phone designer working on "India phone")

However, anything you find hard to understand or remember or do is probably going to be harder for someone who isn't as close to the design - and that's relevant

But never "embrace the null hypothesis" and conclude that if you have no difficulty, no one else will either

How Much Detail?

Undifferentiated "actors" in scenarios aren't "generative" - they provide no handle for thinking about a new situation. "When poorly anchored in psychological or physical reality, scenarios can be created to promote any feature or support any position" (Grudin)

A danger of "high-fidelity" personas, especially those that are "intuitive" rather than "data-driven" is that designers might focus on some detail or fact that is memorable because it is "extreme" or uncharacteristic

"I have never understood how these personal details actually aid in the design process itself" (Norman)

A stereotype may be a cost-effective compromise if there is only limited time for persona development

Taxonomy of "Types of Detail"

("Some details may not seem relevant to the design, but will help the designers and developers create a vivid image in their mind")

Demographic

Emotional/psychographic

Relationships

Context of Use

Psychophysical

Level of Effort Guidance

The amount of effort put into personas has to be commensurate with the scope of the service or system being designed

(Just as the amount of "character development" needed for key roles in full-length movies and TV series is greater than for one-time bit players)

The more detailed a persona is, the less it can be reused, because it is specific to a particular service or system design

The more detailed each persona is, the more of them that will be needed to cover the range of current and potential users

(ISchool student projects usually have 3-5 personas; IT projects on campus a few more; [Microsoft Windows Dynamics had 61](#))

Why Not Use "Real" People as User Models?

Traditional ethnography relies on information obtained over a long time from a small number of "informants"

If the design is intended for a small, homogenous and well-known user population (e.g., an internal or legacy application) then these specific users need to be understood

But for services or systems intended for broad use, a set of personas can capture the range of variations in types of users that a few real people can't cover

(Personas only need to be realistic, not real, as long as they accurately characterize the user base)

Static vs Dynamic Personas

The original idea of persona was as a rich and static model

Note how Microsoft uses "persona schwag" - posters, flyers, etc - to reinforce the use of personas in development

But is this inconsistent with agile methods and the idea of changing specifications as requirements evolve?

Could we have dynamic or evolving personas? How would we do that?

Microsoft Persona Posters



Personas and Market Data

Marketing gathers huge amounts of data about consumers, in order to create market segments and determine who will buy what

The data that marketing captures is primarily "demographic" - age, education, residence location, race, and to a lesser extent "psychographic" - attitudes, lifestyle, hobbies, risk tolerance

There is an overlap here with the sorts of characteristics that go into personas, and by using marketing data as basis for persona building, it's possible to get a richer and more targeted set of personas

But the overall purpose of market data and personas is different; market data is used to carve up the user population into non-overlapping bins, whereas personas can have partial overlap because they also take goals into account - two personas can want the same thing, but for different reasons, or have different experiences in doing it

Reading for 6 October

Dan Gruen, Thyra Rauch, Sarah Redpath, & Stefan Ruettinger. "The Use of Stories in User Experience Design", International Journal of Human-Computer Interaction, 2002.