Running Persona Workshops

Northern User Experience

September 2008

Judith Garman

Judith.garman@abilitynet.org.uk
What is a persona?

- An imaginary person based on real data
- A tool for understanding the wants needs and limitations of our customers
- A vehicle for communicating customer needs to business stakeholders
Why personas work

- Brings the user to life
- Non-technical and can appeal to all stakeholders
- Help create a focus on specific goals
- Helps teams understand who they are designing for
Why personas don’t work

- Lack of credibility and understanding
- Lack of stakeholder buy in
- Poor communication
Overcoming the barriers

- Make persona development part of the UCD process
- Engage your stakeholders in persona creation and persona related activities such as cognitive walkthrough
- Market your personas
Engage your team

- Select representatives from your stakeholder team
  - Management
  - Marketing
  - Usability/User Experience
  - Business analysts
  - Development
Assumption Workshop: 1

- Book in an 90 minute to 2 hour workshop
- Invite representatives from your stake holder group up to a maximum of 12
- Run the assumption exercise
Assumption Workshop: 2

- Ask your delegates to think of people who will be using your system then to record a goal, activity, action or problem about that person.

- Here are some examples based on an online supermarket.
  
  **Example 1:**
  - Person: Middle aged woman
  - Assumption: lacks confidence making financial transactions online

  **Example 2:**
  - Person: Busy executive
  - Assumption: time poor and patience poor

  **Example 3:**
  - Person: Pensioner with poor vision (cataracts)
  - Uses a custom style sheet her son set up to magnify text
Assumption Workshop: 3

- Hand out sticky notes* and ask delegates to write down as many examples as possible of ‘Person and Issue’ on separate sticky notes

- Allow 20 minutes for this exercise

* Accessible workshops – if you have delegates who’s preferred recording method is not writing options include enabling them to record their ‘Person and Issue’ notes electronically or working with the facilitator to record notes.
Assumption Workshop: 4

- Create an affinity diagram based on everyone's assumption notes.
- Go round the room asking people to read out their assumption notes.
- Place each note on a board or wall.
- As notes are read out, themes will arise, and you can group the notes.
- Give the separate groups names (and numbers) to help identify them.
- When everyone has read out all the notes, review the groups your delegates may want to move things around.
- Record the affinity diagrams electronically – Excel works well.
Research

- Personas must be based on real data to be realistic
- Collect all your different data sources in paper and electronic formats
- Number all the data sources.
- Some data sources may be less relevant, prioritize by relevance
- Research your market
  - Use primary and secondary data sources
  - Stake holder interviews and ethnographic study
  - User testing reports
  - Competitive analysis
  - Marketing research
  - Journals and newspapers
  - Web resources and technical libraries
  - Job adverts, curriculum vitaes
  - Help logs, blogs and more.....
Factoid Workshop: 1

- Book in an 90 minute to 2 hour workshop
- Invite representatives from your stake holder group up to a maximum of 12
- Run the factoid exercise
Factoid Workshop: 2

- Populate your meeting room with the affinity diagrams made from sticky notes prepared in the assumption exercise and share the electronic version with the team.

- Take your numbered data sources and assign them to your delegates.

- Hand out sticky notes (use different colours and shapes to those used in the assumption exercise or write a distinctive number or symbol in the corner).

- Ask your delegates to prepare factoids on sticky notes (or electronically) – Factoids are important pieces of information from the data source.

- Allow 30 minutes for this exercise.
Factoid Workshop: 3

- Some example factoids

  - Data source 1*
    - The text size on every page has been "hard-coded" so that a user cannot easily make it larger – so vital for many visitors who have a vision impairment or who are viewing the site on a small screen.

  - Data source 2**
    - According to Nielsen, online shoppers tend to stick to the shopping sites they are familiar with, with 60 percent saying they buy mostly from the same site.

- Each factoid should reference its data source

*AbilityNet eNation Online Supermarkets http://www.abilitynet.org.uk/enation4

**Nielsen online shopping survey  http://www.nielsen.com/media/2008/pr_080128b.html
Factoid Workshop: 4

- Go round the room asking people to read out their factoids
- Place each note on the affinity diagram created in the assumption exercise clustering them together
- Regroup and add new groups if necessary.
- Record the affinity diagrams electronically – excel works well
Factoid Workshop: 5

- What the data means

- The data will be in clusters some will have a higher concentration of assumptions and some will have a higher concentration of factoids

- Assumptions only – no research to back up this data, either there is no supporting evidence or you need to do more work.

- Factoids only – You may not have a clear understanding of this user base

- Mixed Assumptions and Factoids – Is the information from both categories in agreement
Skeletons: 1

- Using your affinity diagram from the factoid workshop prepare skeletons of users based on the information

- You may want to prepare the skeletons with another usability professional to assist or a representative from your stakeholder group

- Skeletons are the framework of personas they describe the data

- The skeletons should be made up on information from the affinity diagram, you can reword the information

- Aim to create between 4 and 7 skeletons from your data

- Once you have agreed which skeletons to use you can pad them out with fictional data to make them into personas
Skeletons: 2

- Sample skeleton:
  - Woman aged 35-44
  - Barrister
  - Spends 4+ hours a day using computer (home and work)
  - High level of IT literacy
  - Very busy
  - Intolerant of shoddy goods and services
Skeleton Workshop: 1

- Book in an a 1 hour workshop
- Invite representatives from your stake holder group up to a maximum of 12
- Run the skeleton prioritisation exercise
Skeleton Workshop: 2

- Hand out the skeletons to your group
- Ask them to chose their favourites and prioritise them in order of importance
- Give everyone a voting sheet to notes down their preferences and comments
- Allow 15 minutes for this exercise
- Go round the room asking people to read out their preferences one at a time giving reasons for their choices
- When the first person has read out their preference you can ask if anyone else made the same choice
Skeleton Workshop: 3

- Carry one going round the room till everyone has read out their preferences
- Try and achieve a group consensus on which skeletons you will progress to persona status
- Generally this will happen quite naturally and some skeletons will be abandoned.
- Choose the skeletons that represent the users that will have the most impact on user and organisational goals
Create your personas

- Put in more specific details to make your persona human:
  - Name, age, interests
  - Personal characteristics
  - Goals and motivations
  - Photos
  - Job/profession
  - Internet/Computing profile
  - Computing/technical likes and dislikes
  - Quotes
  - Work/Home computing environment
  - Frequency of computer use
  - Anything else you think is important
To conclude

- Personas can be used throughout the development life cycle
- Personas help add credibility to your designs and the decision making process and get buy in from your stakeholders
- This approach works really well because the level to which you engage your stakeholders means by the end of the process they really believe in the personas
Credits

- This presentation is based on the approach in:
  - The Persona Lifecycle: Keeping People in Mind Throughout Product Design by John Pruitt & Tamara Adlin

- The book has lots more information on designing and using personas and I strongly recommend it as a resource to anyone interested in developing and using personas.

- You can buy the book at Amazon

  http://www.amazon.co.uk/Persona-Lifecycle-Throughout-Interactive-Technolo
Thank you