Running Persona Workshops

Northern User Experience

September 2008

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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**

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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**

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Why personas don't work

- **Lack of credibility and understanding**

- **Lack of stakeholder buy in**

- **Poor communication**

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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**

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Engage your team

- **Select representatives from your stakeholder team**

  - ➤ **Management**
  - ➤ **Marketing**
  - ➤ **Usability/User Experience**
  - ➤ **Business analysts**
  - ➤ **Development**

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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**

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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 on-line 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

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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.

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Assumption Workshop: 4

- **Create an affinity diagram based on every ones 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**

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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.....**

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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**

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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**

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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

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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**

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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**

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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

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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**

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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

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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

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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

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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**

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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-Technolog

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Thank you

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