



Practical personas

Confessions of a former persona sceptic



Persona: archetypal user

Not stereotypical

A woman with long brown hair, wearing a white t-shirt, is sitting at a desk in an office. She is looking down at a laptop with a frustrated or stressed expression. Her hands are resting on her cheeks, and she appears to be leaning forward. The background shows a window with blinds and some office equipment.

You are not the user!

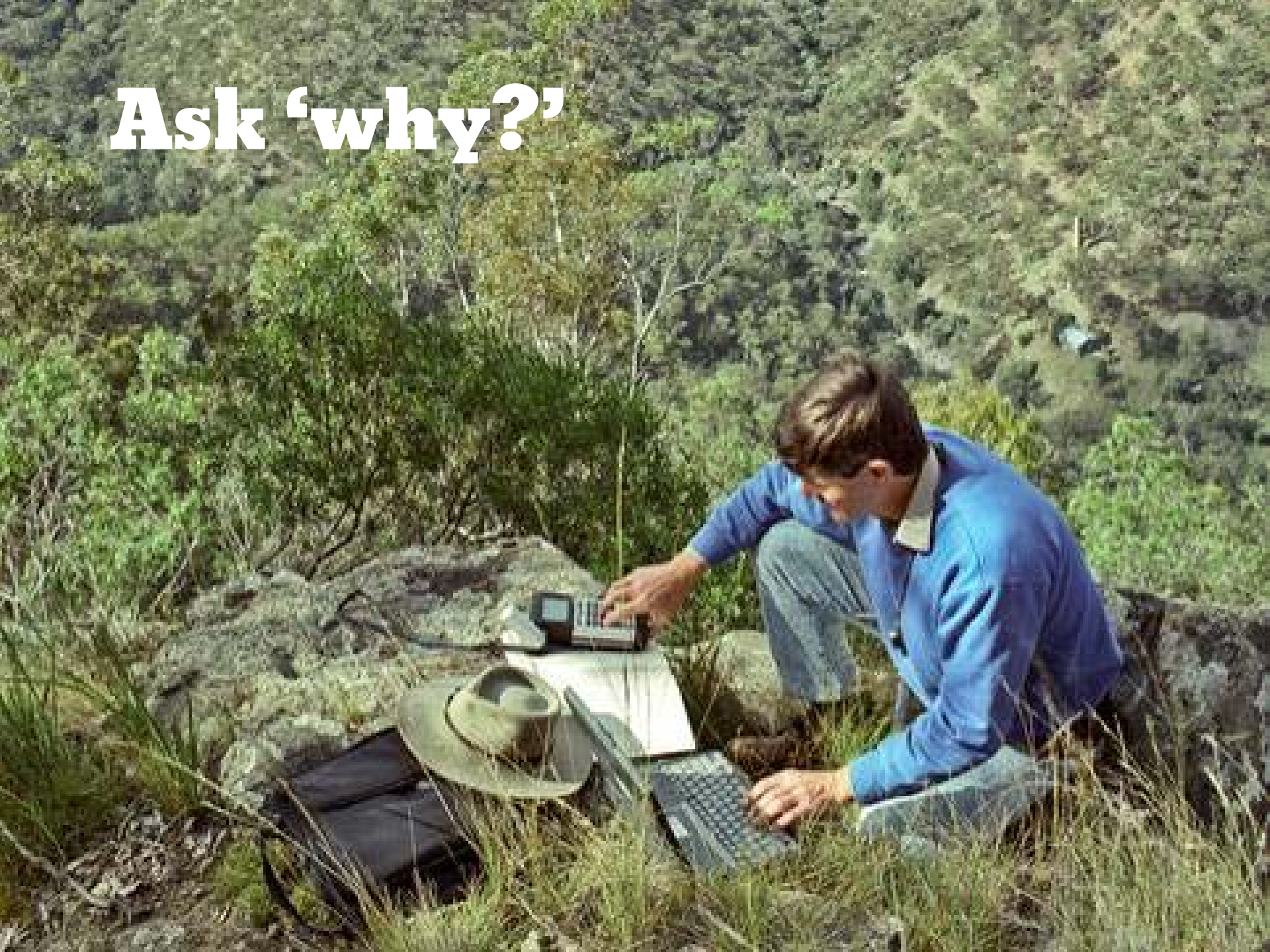


There is no 'average' user



Empathy = insights

Ask 'why?'





West Midlands Power 800 Call Centre

0	13.5	1	10.2
515	1	244	1
13	2	3	2

Talk to customer-facing staff

Record stuff

Think CSI

[Handwritten notes on a piece of paper, partially obscured by a pen and other papers. The text is blurry but appears to be a list or notes related to the 'Record stuff' theme.]

... together. All
... names. ...
... election was great. ...
... of people have ...
... change expectations. ...
... they get over ...
... still have better ...
... later and ...

How many to create



Manager



Executive
assistant



Policy
officer



Customer
service
officer



Extension
officer



Field
officer



New
starter



Scientist

How many to create



Manager



Executive
assistant



Policy
officer



Customer
service
officer



Extension
officer



Field
officer



New
starter



Scientist

Aim for
6-8

How many to create



Manager



Executive assistant



Policy officer



Customer service officer



Extension officer



Field officer



New starter



Scientist

Aim for
6-8



at a minimum, include these

Ways to present them

Personas Designing for collectors

Name	Christie Park
Age	25
Occupation	Just graduated with a fashion design degree; V dealer, designer and consultant in fashion ind
Collecting	Fine Jewelry / Antique Jewelry / Costume Jew
Tech usage	Running a personal blog, use eBay and Amaz Happy, out-going, social, like beautiful things and hobby

Personas



Christie Park

Personas Designing for collectors

Name	Ben Henry
Age	19
Occupation	Full-time college student
Collecting	Baseball, baseball cards, to
Tech usage	A personal podcast and bl
Lifestyle	Collecting as a hobby and a
Attitude	Collecting as both a hobby a
Environment	Began to collect baseball rela

Personas



Ben Henry

Personas



Jim Snell

Personas




Ellen

Personas



Meet John



John is a Buyer Persona Specialist at Intercom. He has helped over 100 companies create buyer personas that drive growth and improve customer experience.

Buyer persona
2 repins

moveo.com



FlavourCrusader < Zumo
3 repins

zumo.io



Make it Persona(ble) How Creating User Personas Helps You Sell More
2 repins

onlinebusiness.volusion.com



Focus on the Job, Not the Customer | The Intercom Blog
1 repin

blog.intercom.io



Personas as a design tool
1 repin

saas4.com



personas-sustuhrlchf.jpg (1018x915)
1 repin

blog.seibert-media.net



Personas are effective < Visible Area things visible - things imaginable
1 repin

visiblearea.com



Personas geben Zielgruppen Gesichter - WSEIBERTMEDIA Weblog
1 repin

blog.seibert-media.net



How User Personas Can Improve Your CRO Strategy
3 repins

blog.kissmetrics.com



blog_personas.jpg (893x574)
1 repin

amergos.plus.com




Context In Content Strategy: Personal Behavioral Context | Daniel Eizans: Content Strategist, Geek
1 repin

daneleizans.com



Usability In The News
2 repins

usabilitynews.usemomics.com



TASK ANALYSIS AND Service Design Tools
2 repins

servicedesigntools



user experience
1 like 12 repins

blog.effectiveui.com



Google Image Result for blog.roundarch.co...
5 repins

google.com.ua



Blueprint | Service Design Tools
1 repin

servicedesigntools.org



Janis



Personas

servicedesigntools.org



Behind the Design: The EPA's Greenhouse Gas Data Tool | Forum
1 repin

Pinterest

pinterest.com/kooj/personas

Sample persona document



Joseph

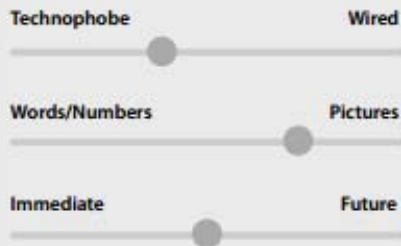
Sustainable home improver

Age 32
Occupation Solar panel installer
Education Advanced diploma (Electrician)
Family status Married, 2 children
Location Blaxland, NSW
Challenges Mildly dyslexic

Online locations: Home
Computer type: Windows desktop
Connection type: ADSL1 (ADSL2 not available in his area)
Internet usage: 2-3hrs (after hours)

Top five bookmarked websites:

- Facebook
- Hotmail
- ninemsn
- iTunes
- Courier mail



Joseph is looking to save money on "green" home improvements

What is getting in the way?

- Working out the best way to finance his green renovations is confusing.
- The long application process is a hassle.
- Some providers offer "green loans" with lower interest rates, some others have better loan features which is confusing.
- Limited time to research/look into different options is frustrating.

How will Joseph interact with Greening Your Home?

Referrer Internet search

Introduction touchpoint Website home page

Questions

- How much can I borrow?
- Am I better off getting a credit card or redrawing on home equity?
- How do specialist loan providers compare to major banks?
- Who offers "green loans"? How much would I save?
- What government subsidies/rebates apply?

Reasons to return

- Comparing rates/features with other providers.
- Calculating repayments.
- Learning about subsidy options.
- Submitting an application.

Who influences Joseph?



Joseph's situation

Goals

- To renovate his home, including adding some energy and water efficiency measures.
- To increase the value and reduce operating costs of his home.

Keywords

renewable energy, solar, sustainability, environment, home improvements, renovations, green loans

Joseph's story

I'm looking to renovate my home to make it more sustainable. I got into the renewable energy field because I was interested in electronics and working with my hands, and I thought it would be a good industry with strong prospects for the future.

I wouldn't call myself an "environmentalist" – I'm not a greeny – but I do enjoy the fact I'm helping reduce emissions, which seems to be very important. With 2 kids it's important to me that we help fix some of the things that we've done wrong for their sake.

I'm going to do some of the work on the house myself – I've already installed panels myself and done some previous minor renovations – but I will need some help. Mainly, though, I just need enough money to pay for the up-front cost of things – I know we'll get the money back through savings in the longer term.

I'm aware of some of the government rebates related to solar energy (as part of my job), so I'm looking to find out if there are similar options for water and energy efficiency.

Personas

Eric, Sr. Engineer



Background

- Electrical engineer for 12 years
- Worked at Teledyne for 7 years

Goals

- Take advantage of technology to improve his company's products
- Quickly design in substitutes for parts in existing designs
- Collaborate with other designers to ensure design changes work

Key Tasks

- Research possible design solutions
- Understand project requirements
- Compare products to select best fit to project requirements
- Design, build and test products

Web Tasks

- Find product matching known criteria
- Find new products in area of expertise/interest
- Learn about products and solutions
- Order samples, evaluation boards
- Order products
- Find tools to help with product selection or design
- Look for application information

Frank, Manager



Background

- Worked at Stratton for 20 years; started as a junior engineer

Goals

- Communicate project needs to his team and oversee project development
- Coordinate design team's work
- Design sections of a product
- Find the best part for a design based on price and performance

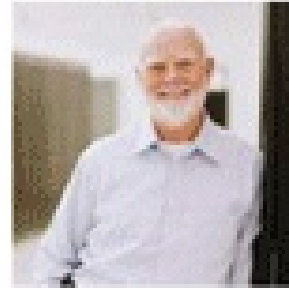
Key Tasks

- Understand project requirements
- Define and communicate project needs
- Research design solutions
- Compare products for best possible fit to requirements
- Analyze products and select best fit to project requirements

Web Tasks

- Find product matching known criteria
- Find new products in area of expertise/interest
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Jason, R&D



Background

- Worked at ITS for 23 years; 10 years with another company
- Ph.D. from MIT

Goals

- Design cutting-edge, patentable applications
- Keep up-to-date with the latest technologies to find new ideas for applications
- Have his research published and patented

Key Tasks

- Research possible design solutions
- Define product features
- Compare products to select best fit to project requirements
- Design, build and test products

Web Tasks

- Find product matching known criteria
- Find new products in area of expertise/interest
- Learn about products and solutions
- Order samples, evaluation boards
- Order products
- Find tools to help with product selection or design
- Look for application information

Sheila, Purchaser



Background

- Worked at Digihear for 4 years
- Has a background in administration

Goals

- Get requested parts quickly for the best price
- Track orders easily

Key Tasks

- Purchase products and samples for design engineers
- Order products for manufacturing plant
- Track orders and payments
- Keep engineers informed of expected product delivery
- Compare prices from different distribution sources

Web Tasks

- Find product by product number
- Order samples
- Order products
- Review and track orders

Teachers, we don't have a lot of time to deal with extra problems, outside of our everyday chaos.

At home, I use the Internet to do research for the book I am writing. I am also an avid cook, so I connect almost every evening to pick out recipes and view the recipes I've saved online. When I am at home, I have a little bit more time to troubleshoot if needed. And, I do prefer to fix the problem myself, if possible.

This user has a high need for connection and a moderately high willingness to troubleshoot problems when they arise. She is interested in what is happening and why the function is being performed. She wants to learn about her computer and DSL. Tina will study simple wiring diagrams, try to check connections and will download DSL software. She wants to learn more computer jargon, but explanations may be needed. She may also use a chat for customer support, to learn how to fix her DSL connection in her classroom or at home by herself.

Autonomy

CONNECTION NEEDS

In her classroom, for both personal and classroom use

At home, for research, web browsing and checking email

Connection needs to work most of the time or Tina will move to a new company

QUESTIONS ASKED WHEN CONSIDERING A PROVIDER

"How reliable is this service in providing a connection in my room and at home?"

"Do they provide information to me on my connection?"

"Do they provide online chat and an online troubleshooting tool?"

"Do they contact me about upgrades and security updates?"

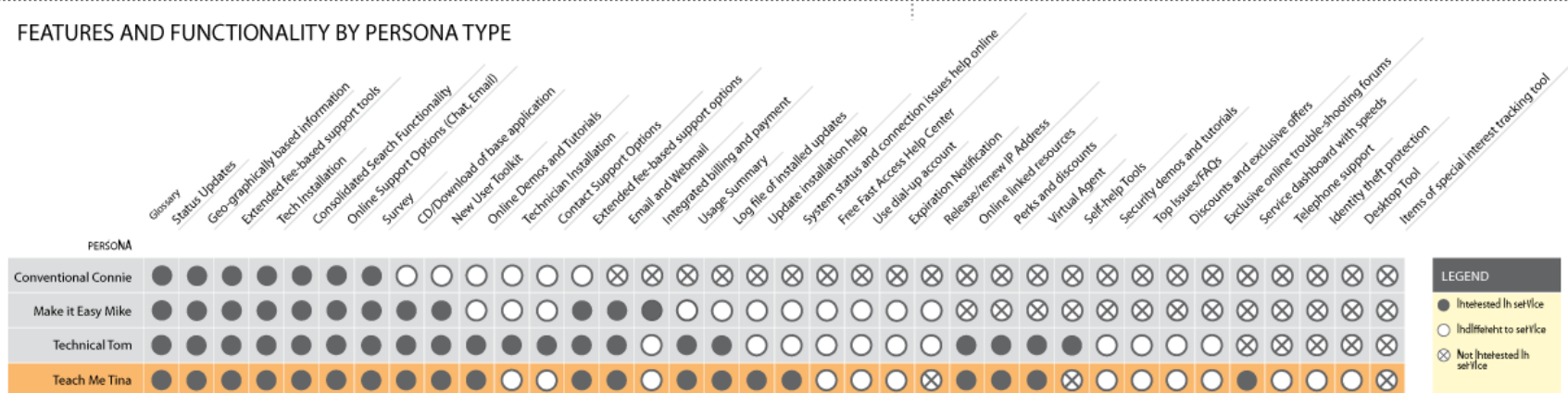
SUPPORT PREFERENCES

- » Writes an email or chat to customer support with questions or problems
- » Will use a tutorial, especially on first visit to a tool or site and will read it carefully, applying knowledge to other areas of the company's products
- » Expects a self-help tool and will troubleshoot on her own whenever possible, using the tool
- » Will only call customer support via telephone as a "last resort"

SECURITY CONCERNS

- » Implements security tools and likes that they are provided for her
- » Wants to be sure that her passwords are secure and appreciates any information that helps her with password security

FEATURES AND FUNCTIONALITY BY PERSONA TYPE



LEGEND

- Interested in service
- Indifferent to service
- ⊗ Not interested in service

Jamie

Profit conscious Agency MD

Worldview

Not sure UX is something I can relate to. I don't really understand it. I'm not sure it can really help my clients convert more visitors to customers. It could be a fad.

Looking for

He's looking to hire someone who can improve his design process. He wanted designers that don't just want to be a designer, but they need a job.

Not looking for

People who claim things they can't deliver. He wants to hire someone who can deliver without a sense of entitlement and good relations.

Next experience

I hope it will be easier than last time and I will benefit more for being someone he's not.

Last experience

Last time it was very difficult to find someone. There were so many wannabe designers with too much creativity and little organization.

Motivation

I want to give my clients very well thought through websites that will convert visitors to customers and increase sales.

Demotivation

He's not sure it's worth the effort to go through the hiring process again.



See my user journey

An overheard discussion with a colleague:

What are you up to this weekend Jamie?

I'll get my thoughts sorted. Playing with the kids. You know, things like that.

Good stuff. By the way are we actually going to be something with this UX thing?

Yeah I know the new client is quite keen on getting a User Experience review of his website. Well I thought we could hire someone new to get a fresh view... What do you think?

We mean George is not good enough?

His questions

How much should I spend on UX?

How to make our designs better?

Why can't my clients see what I'm doing?

Should I hire someone new or try to hire my current UX guy?



Environment officer

Owen

- About me:** "I've always been a fan of the outdoors. I have a degree in Environmental Science and I've been with the Environment Agency for just over five years."
- My main job:** "I'm responsible for advising and exploring environmental policies and dealing with public enquiries. I have a lot of contact with members of the public and local authorities, and I handle various requests on land projects. Although I have a desk, I do quite often get out about. I do sometimes feel I need to be completely up to date on policies and how to apply them - I want to make sure I'm right."
- Work pressure:** "I get the information I need from various people in my office and people doing jobs like mine around the region."
- Work pressure:** "I like most people. I feel that there is never enough time or resources to enable me to do my job properly. I've often got lots of tasks to complete and everything needs to be done quickly. So to be honest, I haven't got time to walk through most of documents to get to the important stuff."
- What I want from Leavis:** "I really use Leavis for getting guidance and procedures. But it's combined with a huge amount of other information. Sometimes you just don't see the wood for the trees. And it doesn't help that some of the documents seem to be duplicated or out of date."



100 Environment Agency | 100 Environment Agency



Environment officer Owen



"I need policy guidance and information to make sure I'm doing my job in the right way. I want to share best practice with other people like me to make sure we're all doing a consistent job."

What I want from Leavis:

- "I need information about technology, policy, and guidance specific to my function."
- "I want to access good practice information."
- "I need access to data specifically related to my function."
- "I want to check internal and compliance information."
- "I need to be able to access complete and up-to-date information from Leavis."
- "I want to be able to give feedback on the information I'm using."







“I need the training and support to put timely information on the intranet”

Age	33
Location	990 La Trobe
Time with MW	5 years
Work environment	Office based
Works from home or remotely?	If I need to
Comfort with Tech	Pretty good and willing to learn

About me

My day job is a support role for my team. I have been around for a few years so I know the business well and I know who's who in the different groups. I am the person people go to when they can't find what they need on the intranet or in Inflo. Authoring intranet content is a small part of my job but is an important way for us to share information about our team and our policies and processes.

Frequent tasks

- People search, phone calls and email
- Organising meetings and events
- Writing content and emailing updates to the intranet team
- Accessing systems such as Inflo, HROnline and Yammer

Interactions

I spend a lot of my time with people, sometimes face-to-face but a lot of phone calls and email. Most of it would be with my immediate team, but if I need something I have a network of people across the business who I can ask for help. I find Yammer a really useful tool for sharing information and getting answers to questions.

What I need from the intranet

I need to be able to update my content quickly and without any hassles or bottlenecks. I'd like to be able to present it in an attractive way so people will be encouraged to read and use it. I also need people to have up-to-date intranet profiles so we can find the right person to help when questions arise.

Rebecca Jackson, Melbourne Water

Make them believable

Tell their stories

What to include



Policy officer – Peter

Age – 39

Location – Sydney CBD

Time with the department – 3 years; previously in federal government

Working environment – office

Access to the intranet – desktop, iPad

Interests – triathlons, renovating, junior cricket coaching

About my job

I work with a broad cross-section of the department to facilitate, coordinate and develop whole-of-department responses to public policy issues. My job involves a lot of research, analysis, industry consultation, and relationship management. I prepare briefs and correspondence on our policy position, research and prepare Cabinet proposals, coordinate the review of Bills, support inter-departmental and inter-jurisdictional committees, and am often required to provide advice to the Minister's office on tight timeframes. A lot of my work is cabinet in confidence, or around sensitive matters, so granular control over document security is very important.

Work pressures

- A lot of my work involves working to very tight deadlines. I need to be able to find the right people and get an answer quickly. If people are on leave or

land use planning. I need to tap into existing networks and bring reference groups together, so we can discuss issues as they arise.

Who I work with

- Subject matter experts from across the department
- Media officers
- Ministerial and Departmental Liaison Office
- Policy officers specialising in other topics
- Legal Branch
- External industry, peak bodies, other agencies,

What I need

I need...	So that...
Notifications of changes to templates	I can be sure our briefs and correspondence comply with the department's and

What to include



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- I do a lot of consultation to gather input from industry bodies, other agencies and other jurisdictions. When we are working on documents together, version control is very difficult to manage.
- When I get a draft Ministerial brief from a staff member, they have often used an old template, so I have to reformat the content so it doesn't get sent back from the Minister's office.
- Not everyone is using the same records management system. I have to work in multiple records management systems, which are all set up and used differently, and deal with some parts of the department via e-mail. It's hard to keep track of everything; it would be so much easier if it was all in one place.
- I need to be able to provide consistent, sound advice in line with the department's policy position and strategic intent. I need a full and accurate history of previous responses, and to know if there are other requests for responses on the same issue across the cluster.

- External industry, peak bodies, other agencies,

What I need

I need...	So that...
Notifications of changes to templates	I can be sure our briefs and correspondence comply with the department's and Minister's requirements
To be able to find subject matter experts quickly	I can consult the right people and provide quality, timely advice to the Minister's office
A secure area to work on draft documents with other parties that I can control access to	I can get input from individuals across the department and external parties without exposing the rest of the department to sensitive issues
An easy to search repository to capture our policy position and previous research, analysis and responses on a broad range of topics	We can provide consistent, sound advice to the Director General and Ministers, and I can build my expertise in other topic areas
One place for all briefs and correspondence, with access controls, audit trail and	I can keep track of everything that's in train, especially when there are

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One place for all briefs and correspondence, with access controls, audit trail and	I can keep track of everything that's in train, especially when there are

“quote”

Validate with real users

Reality check

Put them to work

Make them earn their keep

**Put them to work
in your design**

**Put them to work
in your content**

**Put them to work
in your prioritisation**

**Put them to work
in your publisher training**

**Put them to work
in your contractor briefs**



“ Because we can’t run every decision past a field of actual end users, we rely on personas to do the work for us. They become our friends. We refer to them by name in meetings. It would all be very weird, if it wasn’t so necessary.”


Corey Vilhauer, Blend Interactive/A List Apart



**You still need to
test with real users**

The Gadget Geek

Personality: Introverted, Analytical, Detail-oriented, Curious, Adaptable



Frank
A person who is deeply interested in technology and gadgets. They are often the first to try out new devices and are known for their ability to troubleshoot and fix problems. They are also very detail-oriented and enjoy learning about the inner workings of things.

Technology Profile


- Operating Systems: Windows, macOS, Linux
- Programming: Python, JavaScript, Java
- Hardware: Laptops, Smartphones, Tablets, Smart TVs
- Networking: Wi-Fi, Ethernet, VPNs
- Security: Antivirus, Firewalls, Encryption

Key Qualities

- Problem-solving skills
- Attention to detail
- Ability to learn quickly
- Strong communication skills
- Team player

Mission Critical Superhero

Personality: Extroverted, Analytical, Detail-oriented, Curious, Adaptable



Alan
A person who is highly organized and detail-oriented. They are often the first to notice a problem and are known for their ability to solve it. They are also very analytical and enjoy learning about the inner workings of things.

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Key Qualities

- Problem-solving skills
- Attention to detail
- Ability to learn quickly
- Strong communication skills
- Team player

The Data Cruncher

Personality: Introverted, Analytical, Detail-oriented, Curious, Adaptable



Lisa
A person who is highly organized and detail-oriented. They are often the first to notice a problem and are known for their ability to solve it. They are also very analytical and enjoy learning about the inner workings of things.

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- Team player

The Power Player

Personality: Extroverted, Analytical, Detail-oriented, Curious, Adaptable



Sarah
A person who is highly organized and detail-oriented. They are often the first to notice a problem and are known for their ability to solve it. They are also very analytical and enjoy learning about the inner workings of things.

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- Team player

The Networker

Personality: Extroverted, Analytical, Detail-oriented, Curious, Adaptable



Mike
A person who is highly organized and detail-oriented. They are often the first to notice a problem and are known for their ability to solve it. They are also very analytical and enjoy learning about the inner workings of things.

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- Attention to detail
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- Strong communication skills
- Team player

ML S.O.L.

Personality: Introverted, Analytical, Detail-oriented, Curious, Adaptable



Tom
A person who is highly organized and detail-oriented. They are often the first to notice a problem and are known for their ability to solve it. They are also very analytical and enjoy learning about the inner workings of things.

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- Attention to detail
- Ability to learn quickly
- Strong communication skills
- Team player

The Beta Tester

Personality: Extroverted, Analytical, Detail-oriented, Curious, Adaptable



Kim
A person who is highly organized and detail-oriented. They are often the first to notice a problem and are known for their ability to solve it. They are also very analytical and enjoy learning about the inner workings of things.

Technology Profile

- Operating Systems: Windows, macOS, Linux
- Programming: Python, JavaScript, Java
- Hardware: Laptops, Smartphones, Tablets, Smart TVs
- Networking: Wi-Fi, Ethernet, VPNs
- Security: Antivirus, Firewalls, Encryption

Key Qualities

- Problem-solving skills
- Attention to detail
- Ability to learn quickly
- Strong communication skills
- Team player

The Innovator

Personality: Extroverted, Analytical, Detail-oriented, Curious, Adaptable



John
A person who is highly organized and detail-oriented. They are often the first to notice a problem and are known for their ability to solve it. They are also very analytical and enjoy learning about the inner workings of things.

Technology Profile

- Operating Systems: Windows, macOS, Linux
- Programming: Python, JavaScript, Java
- Hardware: Laptops, Smartphones, Tablets, Smart TVs
- Networking: Wi-Fi, Ethernet, VPNs
- Security: Antivirus, Firewalls, Encryption

Key Qualities

- Problem-solving skills
- Attention to detail
- Ability to learn quickly
- Strong communication skills
- Team player

Tim

Employer



“At tight times we’ve explained why we can’t (raise salaries) and told them to bear with us. The lifestyle and work environment compensate for that.”

Tim, 41, is one of the three directors at PCD, a small direct marketing agency located close to Leeds

At review time people go see their managers and we try to give them more (salary). At tight times we’ve explained why we can’t and told them to bear with us. The lifestyle and work environment compensate for that.

We offer a stakeholder pension and gym membership. Tea and coffee is all free. There’s free parking and flexible lunchbreaks. It’s the things you take for granted, not quite perks but they matter.

With the guys, they’re trying to buy their first places so I don’t think they’re that interested in pensions.

Jonathan was having trouble with his overdraft on his student loan, we ended up paying off his student loan.

With some of the smaller things, like motor, if there was a package that combined all those things, not in a bitty way, all those things packaged up. A basic insurance, investments package.

Needs and Cross sell/ Cross buy Opportunities



Need:

To offer my people what they need at different stages of their lives

Opportunity:

Life event packages which employers can push at relevant times

Need:

Benefits that make the lean times easier for everyone

Opportunity:

Affordable feel-good treats within benefits packages

Need:

Something I feel confident explaining

Opportunity:

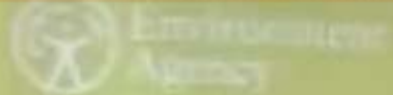
Excellent support and education materials for employers

Need:

An approachable supplier who understands different sized companies

Opportunity:

Down to earth, personal service for the small and medium businesses



Environment officer **Owen**



Environment manager **Marcia**



More resources

- pinterest.com/kooj/personas
- www.steptwo.com.au/papers/kmc_personas
- zum.io/resources/ZumioPersonalIntro.pdf
- blog.openviewpartners.com/simple-ux-user-persona
- www.uxforthemasses.com/personas
- www.followtheuxleader.com/content-strategy/personas-a-critical-investment-to-content-strategy
- designingwithpeople.rca.ac.uk/people
- boxesandarrows.com/building-a-data-backed-persona
- alistapart.com/article/audiences-outcomes-and-determining-user-needs
- The User Is Always Right: A Practical Guide to Creating and Using Personas for the Web – Steve Mulder
- Deriving Personas for Intranet Design and Change Management – www.youtube.com/watch?v=_kHhXONaLnQ17



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Trade &
Investment