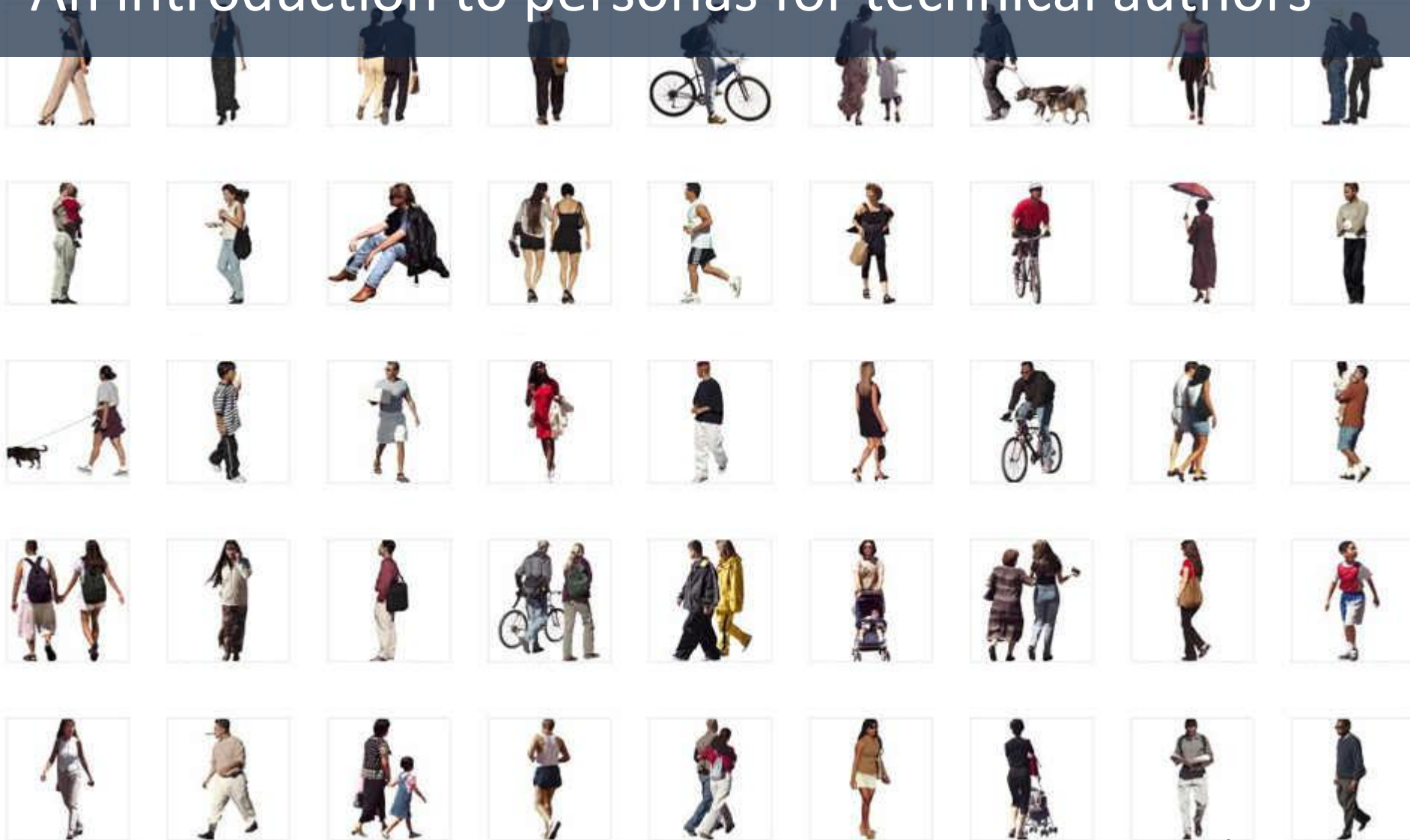


# An introduction to personas for technical authors



Neil Turner  
June 2010

# A bit about me...

- User experience architect at Cambridge Assessment
- This means that I do (among other things):
  - UI and UX design
  - User research
  - User testing and usability evaluation

# What are personas?




# Some example personas

**Cheryl**  
The seasoned assessor

**About Cheryl**

- Teaches history at a Grammar school
- Has been a teacher for over 20 years and assessor (off and on) for 10 years
- Is comfortable with the current paper process
- Has previously struggled being a full time teacher and assessor
- Is not very confident using computers
- Enjoys the social aspect of being an assessor
- Has heard a few horror stories about eAssessment (e.g. marking on-screen)



**OCR**  
NATIONAL ACADEMIES

*"Being an assessor helps my students and helps me to pay for our summer holiday"*

**Key goals**

- Earn some extra money
- Keep in touch with her network of assessor friends
- Coach her students

**Confident learner**

**Samantha Bell**  
"I'd love to keep in contact with my friends"

Female, 27 year old, single  
Student

Sam prefers to learn how to things by trying things out by herself. She isn't worried about 'breaking' anything. If she does need help she would prefer to not to refer to a manual but "do it herself".

Sam is about to go abroad for her gap year, so her parents decided to get her a new camera, to make sure she's able to record everything she gets up to.

She likes the camera as it looks so modern, and it's able to do so much more than a lot of her friends' cameras.

She loves being in contact with people all the time, and finds it's a great way to kill time like when waiting for the bus. She uses a lot of the more advanced features – panoramic shots, online upload and

When she encounters a problem she ignores it most of the time - she's not sure if she even got a manual with the camera. When she has trouble she can't ignore she speaks to her friends, or goes into a camera store – she wants to be talked through the problem.

**Needs**

In order of preference:

- To share pictures with her parents
- To share her pictures with her friends
- To share her pictures with people she meets whilst travelling

**Key attributes**

	Low	High
Knowledge	●	
Experience	●	
Help use	●	
Confidence		●

**Ideal features**

- Ability to take pictures
- Ability to upload images to personal site using 3G/WiFi
- Allowing others to access her pictures remotely
- Long battery life
- Ability to name and add comments to uploaded images
- Ability to create several albums, and upload pictures to each

**Frustrations**

- Lack of wireless/3G access
- Slow uploads
- Low battery life
- Need to be plugged in to upload images
- Slow shutter speed
- Want to be able to name/add comments to uploaded images
- Getting online is confusing
- Creating new albums

Picture credits –  
Herdcore, Flickr CC  
<http://www.flickr.com/photos/sinerdcoregirl/>

March 2010

Webcredible – user experience research & design

**Life's Destinations At Your Fingertips**  
GOING PLACES WITH NOKIA N97 AND OVI MAPS



10:26 AM  
LOCATION: Victoria  
DESTINATION: Victoria

See nearby, selected or business development as a growing tech company, looking for new investors and partners. The person who developed the Nokia N97 is the ultimate mobile phone and camera developer designed to connect to users with the Nokia N97 and explore the map, and experience connectivity at its best.

Join Alex Harding as he navigates his day, and experience connectivity at its best.

NOKIA

**Gita**  
The prospective assessor



*"I'm keen to develop my skills and earn some extra money"*

**Chuck: Casual Web Surfer**

**Context:**

Just received tweet from friend about Moss a Man - Derives from link on MAA blogpost.

**About Chuck**

- spends a fair amount of time on web
- browser, phone, tablet, etc.
- likes to be part of a larger web community
- likes to be part of a larger web community
- likes to be part of a larger web community

**Implications**

- Support multiple channels of communication
- Feature Nokia highly - help clinic learn about Nokia
- Show what a small contribution does
- Help Chuck make MAA a topic of conversation
- Project small a personal value

© 2010 Jeff Patton, all rights reserved, www.AgileProductDesign.com

# What are personas?

- Representatives for your users / audience
- They represent the goals, motivations, characteristics and behaviour of a real group of users
- They are fictional, but based on fact (hopefully)

# A detailed persona



## Gita

The prospective assessor

**Age:** 26

**Job:** Teaches Biology (GCSE and AS) at Barnwell School, Stevenage, Hertfordshire - has been a teacher for 2 years

**Education:** Biology degree and PGCE (Post graduate certificate of education)

**Location:** Lives in a 2 bed house on the outskirts of Stevenage

**Family status:** Living with boyfriend Ravi

**Personality:** Sociable, keen, enthusiastic

**Assessor experience:** None, although she has experience of marking mock exams and coursework

**A**

### "I'm keen to develop my skills and earn some extra money"

**Key goals**  
Gita wants to:

- **Earn some extra money**  
Gita and her boyfriend are finding it live a house, so any extra money comes in handy
- **Gain experience as an assessor**  
Gita feels that having experience as an assessor will look very good on her CV
- **Become a better teacher**  
Gita hopes that being an assessor will ultimately help her to be a better teacher

**Key needs**  
Gita needs something that is:

- **Compelling and non-threatening**  
Gita needs to have her hand held - she doesn't want to leave her job
- **Clear and straightforward**  
Gita needs to know exactly what she needs to do and when she needs to get it done by
- **Fast and efficient**  
Gita wants to get things done as quickly as possible so she can get on with other marking things
- **Earning**  
Gita needs to get excited about the prospect of being an assessor, or at least of the amount of money she can earn

**Key challenges**

- Can we persuade Gita that the reward for being an assessor is worth the effort?
- Can we ensure that Gita can still carry out assessment activities at busy times?
- Can we persuade her that her assessment experience as a teacher will make it very easy for her to become an assessor?
- Can we support Gita through out the assessment process?

### About Gita

**Background**  
Gita is a biology teacher at Barnwell School, a business and enterprise school for 11-18 year olds in Stevenage, Hertfordshire. She is a people person and a business and enterprise school for 11-18 year olds in people. Gita has been a teacher for only 2 years and so is still relatively new to the job. She is part of the science department at the school which has 12 members of staff, so there is always a more experienced teacher on hand to ask for help and advice.

Some of the teachers at the school carry out marking for GCSE and GCE exams and Gita has chafed to learn about their experiences of being an examiner. They have told her that although it's hard work it's a good opportunity to earn some extra money. Gita and her boyfriend are saving for a deposit to buy a house, she's still a little unsure about exactly what it would entail and would like to find out more. Gita is keen to develop her skills as a teacher and feels that knowing more about assessment will help her become a better teacher as she'll be able to better prepare her students for exams. Gita's students follow the OCR AS Biology specification so she is keen to investigate becoming an assessor for OCR.

Gita has some experience of marking mock exams and coursework, but it is a little apprehensive about becoming an assessor because she's concerned that it will take up too much of her time. When she's not in the classroom she spends most of her time planning for lessons and marking students work and usually thought of having to spend her evenings and weekends marking doesn't sound particularly appealing to her.

**A day in the life**  
Gita likes to arrive at the school nice and early (8.15 am at the latest) so that she has time to prepare for her lessons and check that she has all the material she will be using in her lessons. Gita doesn't drive (although her boyfriend has a car) and the school is a 25 minute walk from their house so it means leaving by 7.30 am at the latest. Her term group has registration at 8.45 am and then Gita has 3 teaching periods a day broken up by morning and afternoon breaks, and a 30 minute lunch break. On most days Gita has 3-4 lessons with students and will spend any free periods marking or planning upcoming lessons in the 'work staff room' (which has some computers and is off limits to students). Although lessons finish at 3.30 pm, Gita finishes most days at 5 pm as there are often staff meetings to attend, marking to be completed or lesson plans to work on. The school drama club will put on a couple of shows a year and Gita likes to help out with rehearsals and any productions after school, which can mean that Gita has to take work home to finish.

Gita likes to switch off in the evenings (Ravi complains if she takes lots of work home with her) and prefers to get things done at school when she's still in 'work-mode'. Most evenings Gita and Ravi unwind in front of the TV, especially now that they're trying to experience. Gita is a member of a local drama group and when performing in the show.

**Computer & IT experience**  
Gita is very comfortable using computers and uses the internet most days (there is a computer in the work staff room she can use to check email and go online). She uses Facebook a lot to keep up with friends and pop down to London at the weekend to catch a show and meet up with friends.

At home Gita uses Ravi's laptop (which runs Windows XP and has a 15" screen running at 1366x768) to go online. They have a 2Mb wireless broadband connection which annoyingly has taken to disconnecting every few hours.

**Attitude towards increased use of technology**  
Although Gita is generally a user-adaptor of technology (she only recently upgraded her mobile phone to a flash new model) she is very comfortable with computers and going online. She is unlikely to be phased by being with paper marking, so it is a bit of an unknown for Gita.

**Why is Gita important to OCR?**  
OCR wants to encourage suitably qualified people such as Gita to apply in order to increase the pool of available assessors. Someone like Gita could also become a useful advocate for assessment - dispelling fears and outlining the benefits of carrying out assessment activities online to other teachers at her school.

**Why is Gita a challenge?**  
Gita is still very new to teaching and to assessment in general, and is easily scared off. She is also often time poor and doesn't want being an assessor to negatively impact her teaching time.

OCR reserves copyright of this persona. Please note that this document is for internal use only.

# A brief persona

## Cheryl

The seasoned assessor

### About Cheryl

- Teaches history at a Grammar school
- Has been a teacher for over 20 years and assessor (off and on) for 10 years
- Is comfortable with the current paper process
- Has previously struggled being a full time teacher and assessor
- Is not very confident using computers
- Enjoys the social aspect of being an assessor
- Has heard a few horror stories about eAssessment (e.g. marking on-screen)




*"Being an assessor helps my students and helps me to pay for our summer holiday"*

### Key goals

- Earn some extra money
- Keep in touch with her network of assessor friends
- Coach her students

# A quick and dirty persona

Chuck: Casual Web Surfer	
	<u>Context:</u> Just received tweet from friend about Mevo a Month - Donates from link on Mevo blogpost.
<u>About Chuck</u> <ul style="list-style-type: none"><li>- spends a fair amount of time on web<ul style="list-style-type: none"><li>- browser, phone, tablet, RSS reader, Twitter</li></ul></li><li>- cares about making the world better - more of a global thinker</li><li>- Wants his small contribution to matter - feel like it does</li><li>- Wants to be part of a larger web community<ul style="list-style-type: none"><li>- has web as a social</li></ul></li></ul>	<u>Implications</u> <ul style="list-style-type: none"><li>- Support multiple channels of communication</li><li>- Feature Belova highly -<ul style="list-style-type: none"><li>- help create buzz about Belova</li></ul></li><li>- Show what a small contribution does</li><li>- Help Chuck make Mevo a topic of conversation</li><li>- Project small &amp; personal</li></ul>

# An engaging persona

ADVERTISEMENT

## Life's Destinations At Your Fingertips

### GOING PLACES WITH NOKIA N97 AND OVI MAPS



**8:02 AM**  
**LOCATION** Home, Hoboken, NJ  
**DESTINATION** Hoboken Office  
 I start my morning a little later than planned, and as I prepare my coffee I access the Web on my new Nokia N97 to browse headlines and check my RSS feeds and email. My first-line news. It's exciting, but the Starbucks office happens to start with petrochemical clients. Great! I've saved time. In the meantime, I head into the office to prepare for lunch with some potential investors.

**10:26 AM**  
**LOCATION** Hoboken Office  
**DESTINATION** Midtown Manhattan  
 I find out that my boss has missing behind schedule and I need to pick a place in Midtown East. Using Ovi Maps, I see where the nearest restaurants are, choose the one I know (in this case), read a review, call to make a reservation, then send him confirmation via email.

**11:01 AM**  
**LOCATION** Parking lot  
**DESTINATION** Italian Restaurant  
 There's no on-street parking. So I ask Ovi Maps to show nearby parking lots. Selecting to 2D landmarks, I select one near Times Square. I pull in. The rate is great, I'll keep the car here all afternoon. And so I don't forget where I've parked, I save the location.

**11:15 AM**  
**LOCATION** Times Square  
**DESTINATION** Italian Restaurant  
 I plot a walking route from the garage to the restaurant, and decide to walk through Shibuya Alley because the pedestrian map gives me visual guidance with compass support. Guessing the speed at which I walk, it tells me I'll be at the restaurant in 20 minutes.

**12:00 PM**  
**LOCATION** Italian Restaurant  
 I arrive at the restaurant. After we order, I use my Nokia N97 to share our latest corporate board video. He asks me to send him the video so he can share it with his partner, and before our meals arrive, the video is uploaded to YouTube and we've seen his partner the URL.

**1:30 PM**  
**LOCATION** Italian Restaurant  
 As we're leaving, Seth realizes that he has to meet a friend after work at a gallery opening in downtown Manhattan. I offer to send him the address and directions to save him time.

**TURN HERE** Join Alex Harding as he navigates his day, and experience connectivity at its best.

**NOKIA**  
 Connecting People

# Why use personas?



# Why use personas?

- Put a human face to your users
- Encourage us to design and write for real people
- Capture important user needs & requirements
- Help to build consensus
- Provoke discussion about users and usability
- Support and encourage user-centred design
- The creation process forces people to think about and find out about users

# Why use personas?

Sometimes the journey is more important than the destination...



# Creating personas



# 1. Find out everything you can about your users



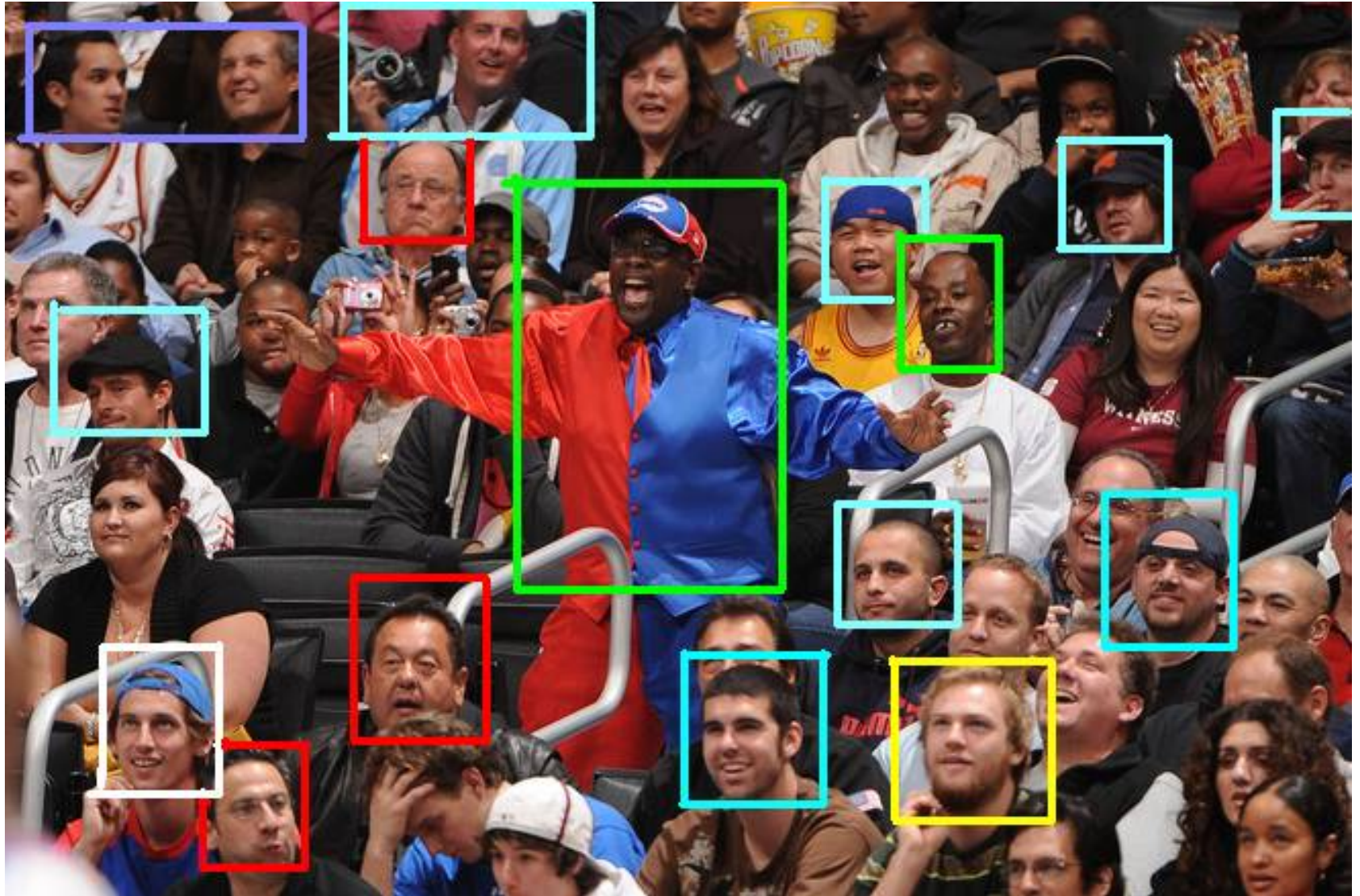
# 1. Find out everything you can about your users

- Talk to your users
- Talk to people who talk to your users
- Read about your users
- Survey your users
- Observe your users (with their permission)
- Write down everything you know and everything you don't know about your users...

# Affinity diagramming can help to analyse findings



## 2. Determine your user groups & their characteristics



## 2. Determine your user groups & their characteristics

- Which groups naturally form?
- What are the trends?
- Which groups are most important?
- What are the shared characteristics for each group?
  - Goals and motivations
  - Behaviours
  - Attitudes

# Map user characteristics

## Frequency of use



Every day



Samantha



Kevin



Martha



Peter



Jane

January	February	March
April	May	June
July	August	September
October	November	December

Every 12 months

# Some example user groups

**Margaret – The reluctant surfer**  
(primary - most difficult to satisfy)



**Paula – The busy mother**  
(secondary – most demanding)

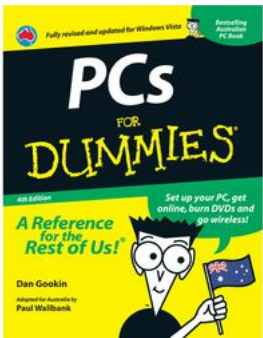


**Toby – The Cambridgeshire newcomer**

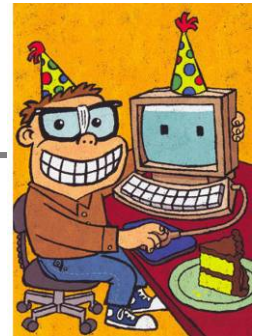
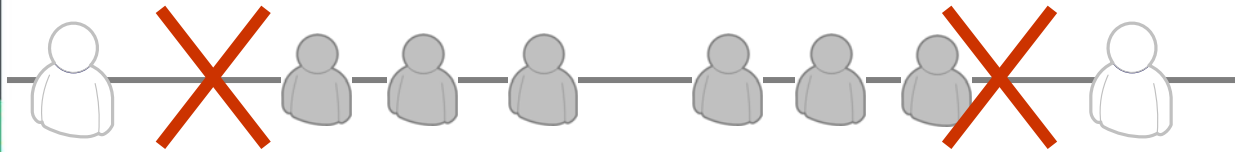


# Set the design scope

## Computer and IT experience

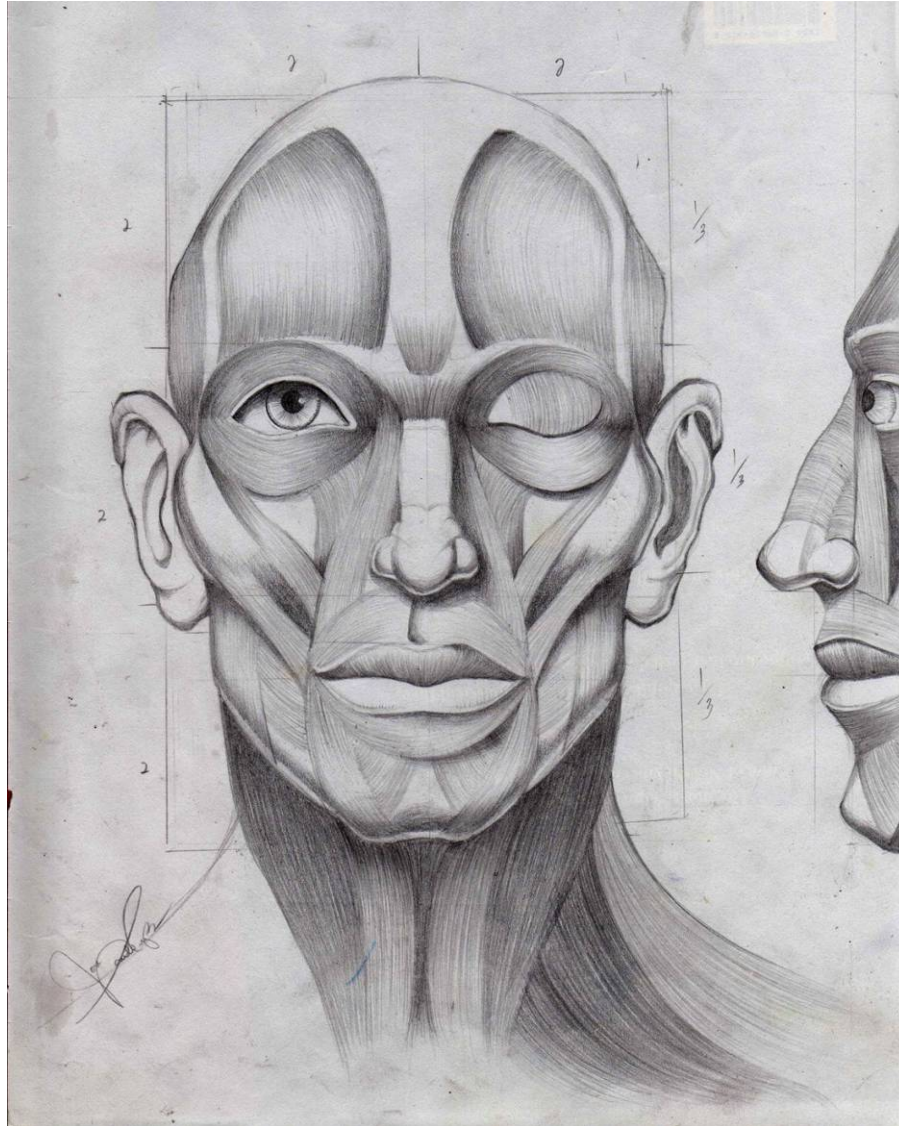


Novice



Expert

### 3. Start creating your personas



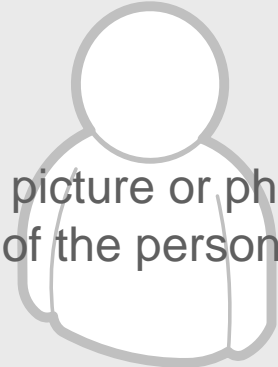
# 3. Start creating your personas

## [Persona's name]

[A tag line for the persona]

About [Name]

- Who are they?
- What is their background?
- What is their context?
- What's important to them?
- What are their pain points and frustrations?



A picture or photo  
of the persona

*"A quote the persona  
might say"*

### Key goals & needs

- Goals
- Motivations
- Drivers
- Needs

# 3. Start creating your personas

## Peter

### The busy parent

#### About Peter

- Works in London for an advertising firm
- Lives in Surrey with his wife and 2 kids
- Has a busy life so is a big fan of time savers
- Is comfortable online and does a lot of shopping online
- Is a 'hunter' shopper – wants to get in and out as quickly as possible
- When shopping usually just wants to find something that ticks all the boxes
- Wants to get good value – preferably at the best price possible
- Gets annoyed by slow and clunky websites



*“I don’t want to have to faff around”*

#### Key goals & needs

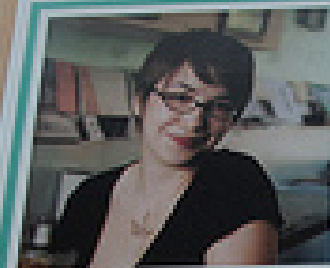
- To get the best price possible
- To be inspired
- A quick and painless online purchase

# Using your personas



**Ruth**

Ruth is a 38-year-old senior content PM who has spent her career in technology.



**Astrid**

Astrid is a 27-year-old former student, studying journalism, media and art at UCL.



**Mollie**

Mollie is a 30-year-old freelance film producer.



**Sam**

Sam is a 35-year-old product engineer at a tech company in London.

experience  
collaborate  
relationships  
community



**Alex** has worked from junior positions to a producer at the BBC over the last 20 years and has gained recognition for her work on various TV programs. Recently, she has found herself thinking less about program features and more about the strategic direction of Radio National.

Throughout her career as a writer and social editor she has accumulated many contacts and knowledge in the real world, and bringing into communities, and is inspired by challenging the status quo.

Her work brings her in contact with a range of different organisations, and a significant part of her job is now about forming these relationships.

"Pool is a place to enable great relationships"

teach  
collaborate  
trends  
projects  
network  
established students



**Fern** has a well-established online presence before she started teaching. Her students appreciate her experience as a producer, especially when he invites external producers to participate in seminars and class assignments.

While he lives close to uni, he regularly spends time in the country south of the city, often with people working on projects. Sam's the biggest teaching it's hard to find enough time to work on these projects.

He enjoys travel and occasionally works in Tokyo. When overseas he will visit local institutions and lecture on trends in media art. He often collaborates with his international peers.

"Pool is a great place for my students to engage with the real world"

media  
organise  
inspire  
alloway most  
talk & communicate relationships



**Lara** is a community manager at Pool, she has a background in media and volunteers at the Brighton Foundation where she helps to organise food-banking events.

In a typical day at the BBC she answers emails from Pool members, posts to the Pool blog, moderates content and keeps the community momentum going. She will also talk with producers and stakeholders about upcoming projects.

She regularly gives talks to external interest groups, and finds that people often ask her about getting involved. She loves this part of her job because she feels like she's making a difference.

"Pool is my community"

collaborate  
research  
ideas  
produce  
inspiration  
creative  
mentor



**Penny** has worked for the BBC for about 13 years, and has a good reputation both internally and internationally. She is married to a partner who works from their home in London, and has 4 high school aged children.

Penny's job is to generate ideas for features, and to follow through on the creation and production of these ideas into finished pieces. Penny will sometimes interview people on the street, collaborate with external organisations, or team up with other producers.

These days, the majority of her modest budget is spent on creative production time, but she still makes the occasional research trip. She generally works autonomously, and often finds herself balancing the various contributions involved with her projects.

"Pool is a place for me to tap creativity"

# Using your personas

Use your personas to

- Communicate and define your users (especially key users)
- Brainstorm and think about content required by your users
- Prioritise content
- Define and think about appropriate language and terminology for your users

# Using your personas

- Evaluate content and documents
- Role-play your users
- Define participants for user testing

# Some persona tips



# Focus on a few core personas



# Make sure your personas are believable

**REJECTED**



# Give your persona a memorable name

- Think of your persona as a brand
- People are more likely to remember a memorable name e.g.
  - Phoebe the photographer
  - Stuart the student
  - Enrique the engineer
- Think memorable, but believable!

# Use an appropriate photo

## Toby

### The Cambridge new comer

#### About Toby (28)

- Currently lives in Cambridge with his girlfriend
- Moved to Cambridge from London 6 months ago
- Is an English & drama teacher at a Cambridge high school
- Is keen on making some new friends in Cambridge
- Uses the Internet most days and will use email and Facebook to keep in touch with friends



*"I use the Internet for everything"*

#### Key goals & needs

- To know where places are
- To find out what is going on locally
- To make new friends

# Use an appropriate photo

- A person photo should be:
  - A good size
  - A head shot
  - Natural, not too staged
  - Royalty free
- Some good websites for finding photos are:
  - [Flickr](#)
  - [Stock.xchng](#)
  - [Fotolia](#)

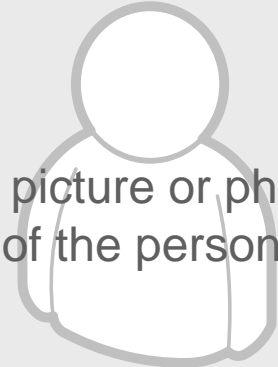
# Use a template

## [Persona's name]

[A tag line for the persona]

About [Name]

- Who are they?
- What is their background?
- What is their context?
- What's important to them?
- What are their pain points and frustrations?



A picture or photo  
of the persona

*"A quote the persona  
might say"*

### Key goals & needs

- Goals
- Motivations
- Drivers
- Needs

# Create and discuss personas as a group

Gosh, do you think that Randy would really say that?



# Cut out any unnecessary detail

- Only include information that is important when it comes to designing for that person
- Throw away any superfluous information (unless of course it impacts the design) e.g.
  - Their favourite film
  - What car they drive
  - Who their best friend is

# Make your personas challenging



# Make best guess personas explicit

## Toby

The Cambridge new comer  
(Best guess – to be validated)

About Toby (28)

- Currently lives in Cambridge with his girlfriend
- Moved to Cambridge from London 6 months ago
- Is an English & drama teacher at a Cambridge high school
- Is keen on making some new friends in Cambridge
- Uses the Internet most days and will use email and Facebook to keep in touch with friends



*"I use the Internet for everything"*

### Key goals & needs

- To know where places are
- To find out what is going on locally
- To make new friends

Reuse them (don't re-invent the wheel)



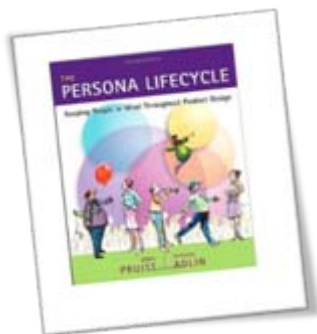
# Don't just keep them to yourself

Get your personas out in to the open

- Talk to people about them
- Put them up on the wall
- Include them in your documentation and presentations
- Create cards and hand outs for them

# Finding out more about personas

- An article about getting the most out of personas is available on my UX blog
  - UX for the masses ([www.uxforthemasses.com](http://www.uxforthemasses.com))
- Some other good websites covering personas:
  - Boxes and arrows ([www.boxesandarrows.com](http://www.boxesandarrows.com))
  - Cooper ([www.cooper.com](http://www.cooper.com))
  - Step two designs ([www.steptwo.com.au](http://www.steptwo.com.au))
- A really good persona book



## The persona lifecycle

Keeping people in mind throughout product design, John Pruitt and Tamara Adlin

A photograph of a theater interior. The background is a large, textured red curtain. In the foreground, there are rows of red upholstered seats, viewed from behind. A dark blue horizontal band is superimposed over the middle of the image, containing white text.

Thank you, and good night...