Personas and Ethnographic Research

Please read Chapter 9, Designing for Pleasure, in The Inmates are Running the Asylum before interacting with this online module.

Personas are the main reason we read Cooper's book. He invented the concept, and it is great to understand the origin and rationale for what is now an integral part of most web design companies' design methods.

WHERE DO PERSONAS FIT WITHIN DESIGN RESEARCH?

Other than the content analysis research we studied in the last two weeks, almost all design research involves helping designers gain a deeper understanding of their audience.

**Formative research** is research conducted before and during production of a media product or experience.

**Summative research** is research conducted after a production has been completed.

Here is a chart of different design research techniques, and the point in the production process when they are most typically applied. (It is an interactive Flash movie -- click to get started, then click and hold down on the different kinds of design research to see when they are typically used.) We will revisit this chart each time we learn a new technique.

Personas are formative research tools used by web and software design companies to create better products by giving the whole design team a tangible, shared sense of their precise target audience.

Persona analysis was invented, or at least it was named, by Alan Cooper. His company, cooper.com, uses the technique almost exactly like he describes in his book. Large and medium sized software companies use this method or variations of it. Almost all of my former students tell
me their software companies use personas.

Smaller companies may or may not use Personas. It depends on whether the company is run by programmers or designers. I have had many former students hired as the sole and first designer in a company with 70 or more programmers and managers. These companies do not use Personas. Their products are also not user friendly, which is why they eventually hire a designer. Usually just one designer, who is supposed to know how to do everything including design research.

A former TC841 student commented that the tenants of personas are familiar -- in her marketing classes, the pervasive slogan was "delight the few, attract the many." Although you may not use Personas in every company you work for, understanding the technique is important knowledge for someone earning an MA degree in Digital Media Arts. You may find it is you yourself introducing the method to your co-workers, or using it yourself in your own startup company. Or you may work for a company where the method is used all the time.

**Question:** Is user persona commonly used in industry?

**Answer:** I discussed this briefly already, but let's think about who has to buy in to the method before you can really use it. Basically, the production company needs to believe in and insist upon it. Programmers and designers need to be told they must comply. And the client needs to also be convinced. A typical client will initially insist their product is for everyone. They need to be educated about the don't-build-a-single-car-for-everyone argument and you need to talk with them about their target users and kinds of personas. So, it is not necessarily easy to use. It is widely regarded in web design companies as a core strategy.

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**INDUSTRY INSIGHTS**

*Senior Design Manager for Yahoo!*

"My team is currently working on a project to attract a different user demographic. None of team has experience targeting that user group. Since our user researcher only has 2 weeks left before switching to another project, we unanimously asked her to create Personas. The benefits are immediate. Personas align the entire team, provide us with a tangible picture of the user, and inform our designs."

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**Feedback? Questions?**

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email Carrie!
Introduction to Personas: Design for Just One User

A specific persona helps the designer make decisions about what to include, and more importantly, what to exclude in a media production.

If you were designing a physical product rather than a digital media experience, the need to target a specific market would be obvious.

For example, people of different ages and sizes need different sizes of shoe. Different shoes suit walking in snow, going to formal parties, or running. If someone approached shoe design the way too many people approach digital media design (my media product will appeal to everyone!), then they would create an average of all shoes. It would please no one!

There is a spectrum of specificity, from the one-size fits all vague goal of creating a media product for everyone, to the in between creating for multiple specific market segments, to Cooper’s most extreme position, design for just one user.

A premise most people would agree with is, the more specific your target audience, the greater your potential to delight that audience, because you completely tailor the content, presentation, and interaction to that person (or that kind of person)'s needs and goals.

Perhaps you may at least agree it is easier to create a great product if you narrow the topic and narrow the audience. As Cooper says, try to make 10% of the target audience ecstatic instead of 100% a little bit happy. Narrow the design target to a single persona and nothing stands between that persona and complete happiness.

INDUSTRY INSIGHTS

Sasha Verhage (formerly with Broderbund)

"At a Broderbund software, our design mantra was 'Design for 10% of the users, 90% of the time.' Instead of thinking blue sky we were..."
Abbe Donne's chapter in Design Research described persona methodology applied to a small number of market segments. Cooper's chapter, Designing for Pleasure, describes persona methodology for just one user.

**Why I think Personas are Essential**

*duration - 3:34, file size 1MB*

Is it appropriate to use personas for everything? Can you think of any media products where personas would not be used?

I would guess Picasso paints for himself, for aesthetic artistic self expression. When an artist like Lori Anderson makes an interactive CD-ROM, she may not care that I can't figure out how to use it. In general, for those of us who are commercial artists rather than pure artists, there is always an audience and usually a client. Persona analysis does not need to be the technique we use, but the product almost always has the best shot at delighting the audience if you do some form of audience research.

I believe the persona concept is useful to most design challenges, including documentaries, commercials, public service announcements, and perhaps even dramatic production. We'll see what you think.

I don't think personas would apply to a broad product like an encyclopedia.

Oh, an encyclopedia? Is this intended for elementary school or high school kids? Teachers? Graduate students? Who actually purchases encyclopedias? (I am guessing the main market is parents of grade school children). How do you know how much detail to put in the encyclopedia? What reading level should the language target? How do you design the covers to attract your target audience? Layout appeal? Encyclopedias have target users.

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email Carrie!

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You can't just say you want to make your product user-friendly and easy to use and all of those other good things. Usable FOR WHOM? Fun for whom? Different things are fun, interesting, and effective for different people. The chart below lists some typical usability goals. If you design for specific personas, the usabilities goals are less elastic (they are less likely to get stretched in all directions, more likely to be solid and focussed).

FOR WHOM???

Without specifically designed personas, all of us basically create media products for ourselves, what seems like it would be interesting, usable and appealing to us. Why is this bad? We are rarely representative of the target audience. Usually there is more than one member of the design team, each of whom has a different conception of what's usable and appealing. "The user" is abstract and elastic, unlike real people.

These are the components Abbe Donne's company uses for every persona they create. She uses several personas (somewhat related to market segments). However, each persona is precisely defined. A persona does not have DSL or a dialup modem. It's one or the other. They don't have 2.5 children, or browse the web 1 to 5 hours per day. They are parallel to a real person, with particular, carefully chosen characteristics.
How do I know how much information to include?

I don't think there is a maximum or minimum length for a persona. Some of the details in your examples seemed to me not all that related to what I need to know as a designer. If you read chapter 10 about goals and tasks, I think that may help guide what kinds of detail to include. You want to understand the user's intrinsic, personal motivations that might related to the information product (such as, to relax, to get home from work in time to perform in the local theater; to impress the boss and get promoted).

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email Carrie!
Here is the starting idea for a DMAT thesis which focused on the technology, not the media product and audience. I consider this a misguided way to conceptualize a media production. Understanding the audience must be deeply part of envisioning the product.

**Flash-based Mobile Tour guide for PocketPC**

"This production thesis will focus on using Macromedia Flash as the authoring tool to create a easy-to-use interactive tour guide which runs on PocketPC. This mobile interactive application will provide users vector-based interactive maps of Taiwan which can be zoomed in and out easily. It will also provide immersive QTVR-like panorama movie made by Flash. Furthermore, it will provide a quick English-Mandarin conversation translator. Besides, it will also provide currency converter and step-by-step Flash tutorials with narration to teach certain Taiwanese customs like how to use the chopsticks."

Charlie Tai and I exchanged emails to narrow down the project and focus on the users.

Carrie: My feeling is it's better to do something manageable very well than something too ambitious sort of well. How about just focusing on Taipei rather than all of Taiwan?

Charlie: I think focusing in Taipei city is a good idea.

Carrie: Do you want to target visitors who have never been to Taiwan, or people who have been there before?

Charlie: I think the target market would be visitors who have never been to Taiwan since they are more likely in need of a tour guide.

Carrie: Are you going to target sightseeing/vacationing visitors, or all travelers

Charlie: Yes, English-speaking sightseeing and vacationing first-time visitors who already have PocketPCs, so they know how to use them. I know some of why these needs matter since I've been traveling New York two times by myself with the help of a tour guide book.

Carrie: You probably will want to talk to some english speaking tourists who have been to Taipei, asking them about what would have been useful and interesting to have on a handheld PC and getting to know what they enjoy about sightseeing. Ask them what they did, what they enjoyed, what was challenging, what they wished they had as far as information or help.

We eventually narrowed down to focusing on a guide to the Temples of Taipei. We eliminated the automatic live weather updates and Mandarin to English voice translation device and focused on optimizing appreciation of the temple experience for first time, English-speaking visitors.

Do you see how narrowing audience and topic can make the product better? Less vague, more focussed, with an understanding of what to include and what to exclude that is not based on so much on guessing.

Here's Charlie's **final product**...
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email Carrie!
Personas: Don’t Use a Real Person as Your Persona

The worst thing you can do is to base a persona on yourself. If you base your persona on yourself, you will assume you understand your user perfectly and she is just like you. You know yourself too well to be your own archetype. You know every detail of yourself. You will not have the objectivity to recognize which parts of you to generalize and which to throw out as "edge" characteristics. And you will constantly be asking "what would I like" instead of "what would Clevis want?"

Basing personas on a real person is close to the right idea. It is fine to start with some aspect(s) of a real person. In fact, if you talk to users, you do so exactly so you can have some real people to start from. Part of the art of creating the persona is merging the important user goals and characteristics of several real people into a single, highly representative archetype. A persona is a less well rounded human being than a real person. A persona is a archetype, a stereotypical human, although not in the bad way stereotypes are usually meant.

For example, some designers say if their mothers can use the product, they know they have an easy enough to use interface. They pick out the generalizable aspects of “designing for mom” (someone who began using computers late in life and is not at all comfortable with the operating system or even with the medium). In my case I would omit the fact that my Mom is a nature freak who hates to be inside in nice weather, decorates her house with branches, and only uses her computer when it’s raining or winter. These aspects of mom are likely not relevant to my product and they focus on the individual’s quirks rather than their representative characteristics.

On the other hand, making a persona feel like a real person helps the whole team share the image. But it’s best not to make the persona 100% your mom. Your mom is typical in some ways and totally unique in other ways. Focus the persona on more typical aspects. Construct her adding in parts of other representative users. Pick your quirks carefully and sparingly, to add just enough humanity but not distract from the key function of the persona -- to represent your target user.

Cooper says stereotyping can be useful. But stereotypes are a bad thing, they reinforce prejudice and prevent seeing the whole person.

You’re right, racial and gender stereotypes are ugly, hurtful, and not something I would ever want to encourage. It’s a fine line between designing personas which quickly communicate understanding of the target user versus furthering prejudice and negative stereotypes.
Consider the example of developing personas for a media product teaching patient relations targeted at nursing students. More than 90% of nursing students are female. Although it would be socially progressive and counterstereotypical to create a persona who is male, such a persona would not be a very typical or representative target user. Perhaps calling a persona representative or typical would be better than calling it a stereotype. Archetype is even better. Princeton University's wordnet defines archetype as "an original model on which something is patterned." For example, "Bill Gates is an archetype of the successful entrepreneur."

The point of a persona is to quickly communicate an identity to everyone on the design team. The archetypes Cooper advocates are actually incredibly local to the community of designers and the moment of design. They do not need to communicate to anyone in the world, forever. They need to communicate to the design team, during production. For example, right now, Osam Bin Laden is the bad guy of the moment. Hopefully this will fade from memory soon, but if we want an evil stereotype today, that comes to mind. By local, it may be that the restaurant where the team eats lunch every day has a waitperson with a memorable personality. Perhaps that person becomes the starting point for a persona.

**INDUSTRY INSIGHTS**

Sasha Verhage
Senior Design Manager for Yahoo!

"It is only in the last 3 of 10 year experience that we have used Personas. At Yahoo, teams use them religiously. For example, before major redesigns of the site, they are posted in our team rooms. When we present design solutions, we refer to them and say, "How would Jerry interact with this proposed checkout process based on his concern around privacy?"

Other teams have included the type of user in the name of their persona. For example, "Technophobe Teddy" or "Sophisticated Sally".

Personas are an excellent tool to unify the team, reinforce user centered design techniques, and prioritize elements on the page.

Feedback? Questions?

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email Carrie!
Personas Example: Esther

Here is another TC DMAT MA thesis example. This thesis is finished and online. You can view the final product by clicking on the link below. Young-mi at first indulged me by inventing her persona, but she created Esther before she started production, and by the end of the thesis she was a believer in the power of personas to guide design. She was acquainted with a number of high school girls at her local Korean christian church, and based her persona on a combination of several of them. Here is her project description and her primary persona.

MY FRIEND, MARY MAGDALENE -
A PILOT PROGRAM OF "THE HOLY SISTERS: WOMEN IN THE GOSPEL STORIES"
by Young-Mi Jeon

This project depicts Mary Magdalene as a good female role model of Christian faith, in her own decision and commitment to follow Jesus despite all the traditional barriers for women at that time, which deserved to be called a true disciple of Jesus. The image of Mary Magdalene is independent, active, open-minded, and also warm and caring. This story tells how Mary Magdalene met Jesus and how sincerely she followed Jesus with faith and love. She followed Jesus throughout his ministry, helping with her means. She was the one who stayed with Jesus under the cross and finally became the first witness to Jesus’ resurrection. According to numerous researches about her, she became a leader of one of the first Christian communities. This story is recreated on the basis of the insights from recent theological studies of the Gospels and researches of contemporary teenage girls.

In addition, this program provides the background information of the story and the general
information of the women's everyday life at the biblical period. Considering the potential of the
web site as a social medium, it provides an interfaces to share viewers' thoughts, feelings about
the program through internet. And they can write a message to someone by sending an e-card.

Persona: a Korean American Christian teenage girl, Esther

Esther is 17 years old. Her parents immigrated to the USA when she was 5. Her family is
Christian. She is the youngest one in her family and has two elder brothers. Her parents expect
her brothers to be a pastor and a lawyer respectively, while Esther to be a good daughter and
good wife in the future. They teach her to be obedient, polite, neat, and pretty. She feels boring
and unsuitable. Though she likes pretty dolls and fancy things, she is also active and outgoing.
She wants to be someone more than being a good wife. Her parents work at a laundry for
weekdays. Both of them are always busy and conservative. So she feels hard to talk to them
about her problems with open mind. She wish to have a sister.

At school, since she is a Korean-American, she looks different from others and feels as an alien
among peers. She has black hair and yellow skin. She is short and thin. She is smart and active.
Sometimes she is afraid of being too smart as a girl. Her classmates sometimes mock her
unpopularity since she has no boyfriend. Though she is comfortable without a boyfriend, she feels
pressure from peers. She is confused and struggling with her true identity and her meaning of
life. She becomes curious about her korean tradition. She is not good at computer. She doesn’t
like math and science. She likes to read novels and romantic cartoons. She likes to collect pretty
cards and pictures.

Her family goes to Church every Sunday. Her parents sing in a church choir. Esther and her
brothers have attended from Sunday School to youth group now. Esther have heard many biblical
stories of faith ancestors, including Noah, Moses, Samuel, David, Peter, and Paul. She has rarely
heard of female faith ancestors. She knows some women in the Bible, such as Ruth, Esther, Mary.
They seem to look old style and boring. Her bible teacher tell her the same thing as her parents
do in saying that women should be obedient and chaste. Whenever she reads biblical passage of
women's subordination to men, she feels annoyed since she wants to be independent and does
not think herself inferior to boys. She feels no interest in the church. She thinks the bible doesn’t
say anything about her problem.

Both Young-mi and Charlie's examples are thesis projects where one individual did all of the
research and production. Personas are even more useful when there are two or more people
creating a media product. The personas become a common ground for thinking and
communicating about the target audience and their special needs and interests.

Feedback? Questions?
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about TC841 in general, please email me right away using the link below.

click here to email Carrie!
Personas: Aim for Precision, Not Accuracy

This is probably the weirdest thing about conducting persona analysis. The weirdness will echo in other design research techniques we study later. It is extremely useful to have a tangible persona who you can design for. But how do you know whether you have picked "the right persona?"

Here's the weirdness. It is more important to have a persona than to have the right persona. There are many possible "right" personas. Maybe it is a little like dating. Is there one and only one person in the entire world who is your perfect partner? Or are there a number of people who would be compatible in different ways with you, and you pick the best person from among those you know? Maybe having a date is better than going dancing alone. Certainly having a well-specified, carefully chosen persona is better than designing for the elastic user.

Personas are weird. They are hypothetical. You make them up. You base them on what you know and observe about real target users, but after studying and thinking about users, you invent your personas. Design research is an art as well as a science. Personas even more of an art than most design research.

How do you know if you are picking the right persona? What if you design a product for the wrong person?

Cooper's answer is not wonderfully satisfying. He basically says that any persona is better than no persona. He argues that personas are a powerful tool in the design process because they eliminate the elastic user myth, eliminate the tendency to design one car for everyone that satisfies no one, and they are useful in making design decisions and clearing up disagreements in the design process.

Normally a media product is produced for a purpose, to reach a particular audience, often funded by a client. There may already be users, either of the product you are revising or of a similar product. In a larger or medium sized company, the marketing department conducts secondary and sometimes primary research on user demographics and target markets. In a small company designers themselves often meet with the client.

Someone already knows quite a bit about the target market you are seeking to reach and please, or reach and teach, or sell to. But demographics and client goals do not give designers to rich, personal, hands on understanding that can facilitate really great user-center designs. For this the experts say you need to talk to users. Some companies conduct task analysis first, then develop personas. Cooper's company talks to users, develops personas, and then considers task analysis. All design researchers will say, DESIGNERS NEED TO TALK TO AND OBSERVE REAL USERS.

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email Carrie!
Tory Sawyer developed her personas after watching kids play with software. She had not been around kids in many years and felt that the observation helped her create a more vivid persona.

**ENCHANTED GARDEN MATH (teaching 3 to 5 year olds number 1 to 10 and counting by Tory Sawyer)**

![Image of Enchanted Garden Math](image)

**Primary Persona**

George is 4 years old. George’s family is big; his mom, dad, one older brother, a baby sister and two grandparents as well. They are an active family and spend time together both playing and learning.

George is very active and likes the rough and tumble games and playing with his friends. He watches TV and likes cartoons. He likes the shoot-'em-up westerns and anything with lots of action. He loves loud noises, yelling and fast moving games. He loves computer games and playing with his older brother Frank who shows him how to use the mouse and keyboard. He is coordinated and can control the mouse well. He likes puzzles and solving mysteries. He likes being surprised and loves to laugh.

George is just learning to count and recognized numbers. He can’t do it perfectly every time, but he likes to try, especially when he gets it right. He does not like to be wrong.
George might spend time on the computer just after dinner and before bedtime playing games. While he prefers the loud shoot-'em-up games, he does not mind the learning games if they challenge him, move quickly and have good noises in them. He might also play such games at a friend’s house or in pre-school. Winning is the most fun. Beating the game or not dying is the best. It’s also good to beat someone else’s score.

To appeal to George, Enchanted Math in the Garden will require him to physically move objects around the screen. Incorrect solutions will cause funny “wrong” sounds to occur, while correct solutions will cause funny “correct” sounds to occur. Correct solutions will cause surprise animations and sounds as well. George will be challenged with levels of difficulty. George will be attracted to the wizards, gnomes, trolls and dragons used in the games.

Secondary Persona
Cheryl is 3 and a half years old. She is bright and interested in the world around her. She lives at home with her mom and one older sister. Her mom works full-time so she is involved in both pre-school and after school programs until her mom can pick her up.

She likes playing with her friends, but not too roughly. She likes playing with dolls and watching cartoons and having her mother read to her. She is curious and adventurous about trying out new things. She likes to learn, but is not quick to ask questions. She does not know how to count or read yet. She has played on a computer at school and thinks it is OK. She has played computer games and likes I Spy the best where you have to find all the hidden things. She likes to impress her younger sister and even sometimes show off for her. She likes puzzles and loves being surprised. She draws well already and likes to use bright colors in her coloring books.

To appeal to Cheryl, Enchanted Math in the Garden will incorporate games which require Cheryl to find hidden creatures for the correct solutions. She will be challenged with several puzzle-solving type games and will find surprise sounds and animations throughout. Cheryl will be attracted to the brightly colored screens and the wizards, fairies and elves used in the games.

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email Carrie!
Personas: The Process of Successive Refinement

You have probably heard the phrase, "iterative design." This means design using a process where parts of the overall product are created and revised, piece by piece. The opposite approach would be to create the whole product from start to finish, without revising, changing, and improving it. Successive refinement is like iterative design. You start out rough and approximate, talk to or observer users, think some more, revise and refine your personas.

Here is a list of common stages in the process of developing personas.

1. Use your imagination to invent several personas
2. Observe Users
3. Talk to Users
4. Now that you understand better, invent more personas
5. Refine, combine, eliminate until you have one primary persona

Another universal truth of design research is that you do as much as is useful given your budget and time constraints. If there is no time to observe or talk to users, then just do the first step -- use your imagination to invent personas. If there is time, either observer users or talk to users (depending on whether observation or interview makes more sense for your application) to expand your understanding of what they are like. Then expand your list of possible personas. Eliminate “edge cases” and redundant goals, combining some personas into one. Locate a stock photo and name your primary and secondary personas.

**Question:** Please clarify primary and secondary personas.

**Answer:** Well, for example, a fifth grade kid was the primary persona for the Kids Tour. The teacher was a secondary persona. Someone important enough to the success of the site to keep their needs in mind, but someone less important than the primary user if there was a conflict. If a design decision needs to choose between meeting the goals of the primary or secondary persona, choose the primary.

**What if I have More than One Primary Persona?**

You can best focus with one primary persona and one or more secondary personas. Some projects serve serveral primary personas and develop specialized areas for each key market segment. Notice the MSU home page has individualized menus for future students, current students, parents and families, faculty and staff, and alumni and donors. Each has such
different needs and goals, separate subsites were developed.

**Question:** I think it is important to talk to real people.

**Answer:** You are absolutely right. If there is not enough time or money to talk to real people, then you need to use your imagination. But it's much better to talk to real people.

**Question:** How do you know who to include in your cast of characters?

**Answer:** Generate a large list of possible user types, trying to make each one represent a different kind of user. That is your cast of characters. Then narrow down to the most important for your product and client, and eliminate the “edge cases.”

**Feedback? Questions?**

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email Carrie!
The challenge of design research is that you can read all about the techniques and process of persona analysis, but when it comes to actually applying it, your research comes out better if you are a skilled magician. The hardest part of persona analysis is deciding what kinds of details about this archetypal person to include and what to omit. Cooper on page 128 describes the persona of "Emilee, a business software user."

- Emilee "uses WordPerfect Version 5.1 to write letters to Gramma."
- She "drives a dark blue 1991 Toyota Camry, with a grey plastic kids seat strapped into the back and an ugly scrape on the rear bumper."
- She works as a "New-Accounts Clerk in a beige cubicle at Global Airways in Memphis, Tennessee"

It is somewhat mysterious exactly what details to invent about a persona. Why mention the scraped bumper??? I suppose his point was that she does not spend money on fancy new cars or appearances, but instead is very practical. Some details are crucial to how and why your persona will use your media product. Some details help you understand and make predictions about their attitudes toward technology, toward buying the latest new gadget, perhaps how involved they are in their job.

Other details are there to help everyone on the design team think of this as a real person. This is why Cooper insists on giving personas a name, and chooses a stock art photograph.

Abbe Don’s list (mentioned earlier in this module) is helpful:

- a name
- A photograph
- Demographic characteristics
- Technographic characteristics
- Behavioral characteristics
- Barriers and/or challenges
- Specific goals and needs

**Question:** Is it ever necessary to change a persona or add one midway through the production?

**Answer:** In the 4H Children’s Garden Kids tour I finished this fall, we realized with one month to go before product launch that we had designed the tour just for kids, but that we were not addressing the needs of the teacher. Kids have time and are content to explore. A teacher is extremely busy and wants to find out what is on the site that fits her grade and how it can be used in class, without having to wander around 62 nodes looking for cartoon characters to click
on. So, we added the teacher persona. This led to adding the Apple character (an Apple for the teacher). The Apple bounces onto the screen with teacher information and direct links to all of the learning experiences in that garden node, plus a link to the overview and all of the teacher information.

So, yes, when you realize you have forgotten an important type of user, it is reasonable to add them at any point in the production process.

**Question:** How do I know how much information to include?

**Answer:** I don’t think there is a maximum or minimum length for a persona. Some of the details in your examples seemed to me not all that related to what I need to know as a designer. If you read chapter 10 about goals and tasks, I think that may help guide what kinds of detail to include. You want to understand the user’s intrinsic, personal motivations that might related to the information product (such as, to relax, to get home from work in time to perform in the local theater; to impress the boss and get promoted).

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email Carrie!
PERSONA ANALYSIS ASSIGNMENT

This is a two week project. You must complete and turn in the persona analysis by 11am eastern time February 15 (before I start work that morning). Lateness on either part without prior permission from me will result in dropping your grade by one full point (4.0 becomes 3.0, 3.5 becomes 2.4, etc.)

It is up to you whether you do this project alone or work with one other person in the class as a two person team. I recommend two person teams. Turn in a single assignment you have collaborated to create.

The goals of this assignment are:

- to give you experience observing members of your potential audience
- to give you experience creating and refining personas

In coming up with a "problem space" for this assignment I needed a target audience who is different from TC841 students -- this makes observation and persona analysis easier. I also needed a target audience which could fairly easily be located and observed in a public space. Here is the proposed problem space.

Your company is thinking about starting a business selling some kind of media targeted to bookstores who also have a coffee shop to motivate bookstore coffee shop customers to buy more books and/or magazines.

Note that the goal is not necessarily to impact EVERY person who visits a bookstore coffee shop. You may decide that certain types of coffee shop customers are more likely to buy books, and target that special subset. You choose the profile of your best customer, the kind most likely to be influenced by your media service. (Then get real and see who really goes to coffee shop bookstores.)

For this assignment you (and your partner) will develop three personas.

1. Rewrite the product concept in your own words, being more specific about the nature of the media product than I was.
2. Create an initial persona based on class readings, just by imagining or remembering what people in coffee shops in bookstores are like.
3. Next you will a.) conduct systematic observational ethnographic research, b.) write up the results and c.) create a new persona based on your new insights.
4. Then you will a.) conduct brief interviews with 3 bookstore coffee shop customers, b.) write up your results, and c.) craft your final persona based on your new insights.
5. To sum up you will revisit the initial rough product idea and revised the product idea to meet the needs and wants of your persona.

Phases 2 through 4 of the assignment is described in more detail below. Use your judgement on how to do phases 1 and 5.

2.) Create an Initial Persona

Read the course pages and books about personas carefully. It is very challenging to invent a
persona with the right amount of USEFUL detail, detail that will inform you as a designer about the kinds of design choices to make. Do not go into great detail about irrelevant personal characteristics, but do describe the persona enough and in important details so that you can imagine them as a person and make guesses about what they would like. Two or three paragraphs is probably the right length, but see what works for you. Pick a persona who is a plausible target market for your services. Do not focus on demographics -- that is a market, not a persona.

3.) Conduct ethnographic observational research

I strongly suggest you casually visit your target bookstore and get a feel for the customers and the scene to help you plan your ethographic observation. In addition to thinking about observational categories, you'll need to plan your sampling method.

Our theoretical population is people who spend time in book store coffee shops who can afford to buy books or magazines.

Our sampling frame is people who go to the coffee shop of a local bookstore of your choice.

How will you choose your sample? (What time of day and day of week will you go the bookstore? How will you decide who to observe?) That's up to you to decide, and to justify what you do.

Please spend 30 minutes at the bookstore of your choice, quietly observing the coffee shop section of the store. Notice that suddenly we are conducting University Research Involving Human Subjects! So, what do we need to be concerned about? This is for a class project, so UCRISHS permission is not required, but the professor must review and approve the data collection method. In fact, I will prescribe the method, trying to take into account the concerns of informed consent, risks and benefits, and confidentiality and anonymity.

Before I detail the procedure, there is work each of you needs to do. Before you conduct your observation, you need to think about what you will be watching for and how you will take notes. Planning ahead will result in much more useful results. This is somewhat like creating categories for your qualitative analysis -- think about the kinds of behaviors and user characteristics you are going to watch for. Make a chart with spaces for different observations so that it is easy to record your observations. Be sure to keep observations about different users separate.

Think of ethnographic observation like it is a combination of qualitative and quantitative analysis, but of people and their behavior instead of content. You can include a mix of counting how many times a behavior occurs and more qualitative categories to note observations. In the example below I ONLY list a few quantitative example categories, but you can include qualitative categories, and systematically write down your observations for each of the subjects you observe...

<table>
<thead>
<tr>
<th>SUBJECT</th>
<th>GENDER</th>
<th>TOTAL TIME SPENT BROWSING</th>
</tr>
</thead>
<tbody>
<tr>
<td>person 1</td>
<td>f</td>
<td>30 seconds</td>
</tr>
<tr>
<td>person 2</td>
<td>m</td>
<td>10 minutes</td>
</tr>
</tbody>
</table>

The quality of your observations will depend very much on the quality of the categories you look for. Think hard about what can be observed in a bookstore and what might be useful in understanding your target audience. Be sure to plan ahead carefully but also be open to insights you had not anticipated. Always include an OTHER category! This balance is the art of ethnographic design research.
Here are the rules for making the observations. We will NOT seek informed consent for this informal study. The risks are minimal. This is not for publication, it is just for a class project. The benefits are also minimal, since the main benefit is they will be helping a student do a class project. Telling them they are being watched would likely change their behavior and make them more uncomfortable.

- Do not record any observations about children under 18.
- Do not include the name of the bookstore in your report.
- Do not record information such as name which would allow someone reading your notes later to know who you were observing.
- Be unobtrusive, but don't be sneaky or weird leading people to call the police.

If anyone asks you what you are doing, say that you are working on a class project for a TC graduate research class. The assignment is to observe visitors to bookstore coffee shops. No personal information about the customers will be reported, and the stores name and location will not be recorded. If they have questions about the project they can contact your professor, Carrie Heeter, at 415-681-6473.

If someone who works at the store asks you to leave, comply immediately. If you run into any problems, please let me know immediately, so we can decide whether to modify the assignment for everyone.

Observing Customers Report

METHODS
In paragraph form, describe why you choose the bookstore and time of day to make your observations (but don't mention the name of the bookstore!) Report the categories you were observing for and comment on the experience of making these observations.

OBSERVATIONS
Then include your table of observations (one observed person at time).

EXECUTIVE SUMMARY
Then summarize your observations, always remembering the purpose is to inform your understanding of your target persona.

PERSONA
Create a new persona informed by your observations.

3.) Interviewing Customers

Plan up to five or six (but no more than 6) open ended questions you would like to ask customers to gain more insights into why they like to spend time in the bookstore coffee shop, whether, how, and why they purchase books and magazines, or what their interests are, etc. Don't waste one of your questions on something they can answer with a simple yes/no!

Select a sample of three customers to interview, one at a time. Write down every answer, keeping the results separate by individual (anonymous individual!)

METHODS
In paragraph form, describe how you selected your sample. List the questions you asked.

OBSERVATIONS
One person at a time, list their individual answers

EXECUTIVE SUMMARY
Then summarize your observations, always remembering the purpose is to inform your understanding of your target persona.

PERSONA
Create a new persona informed by your observations. For this final persona, please include the following:

- a name
- A photograph
- Demographic characteristics
- Technographic characteristics
- Behavioral characteristics
- Barriers and/or challenges
- Specific goals and needs

SOMEWHA T SIMILAR EXAMPLES
Here are three examples from a previous semester. The assignment is a lot different, but these students did a great job of presenting their observations and categories: Patti Banyas; Geraud Plantegenest; Kay Chen.

TURN IN LOCATION FOR PERSONA ANALYSIS REPORT
Please go to the Persona Analysis Folder and find the Persona Analysis Project drop box to turn in your project. If you did an individual project, name the file yourlastname_persona (i.e., heeter_persona.doc). If it was a two or three person project, name the file lastname1_lastname2_persona (i.e., heeter_winn_persona.doc).

Feedback? Questions?
If you have any questions, comments, or suggestions about the topic just covered or about TC841 in general, please email me right away using the link below.

email Carrie!