

Creating Quality Personas

Understanding the Levers That Drive User Behavior

insight

Shannon Ford | January 2005



The Persona Framework

Personas are created by many companies to better understand and represent key customer segments. The use of personas is considered a best practice in user-centered website design¹ because they provide a concrete and holistic customer model that informs the design team of important goals, motivations, and other pertinent customer attributes that affect the adoption of a new system.

The simplicity of the end product—a rich description of a person who represents a like group of customers—can make persona creation seem easy. There are, however, a number of important steps that need to be taken during the persona development process to ensure quality and usefulness in the end product.

The commonly agreed upon definition of a persona is “*an archetypal representation of an actual user group whose members share similar needs and goals.*” In the development of any persona set, it is important to remember that:

- Personas have their foundation in real people and are derived from qualitative research with actual users.
- Personas are never based on any one individual, but instead are created to represent a set of characteristics found across many individuals.
- Personas are employed to better understand what users want to accomplish and to develop design solutions that help meet the goals and needs of the group they portray.
- For any given category, there will be multiple personas.

The persona is a design tool that enforces discipline in the site development process. Because there are many ways to define a user and his or her complex set of motivations, creating a precise persona with a detailed personality, background and behavior helps to focus the design team on meeting the distinct goals and needs of a particular user type. In addition, defining and designing for a set of specific personas helps to avoid the common practice of trying to design for all users.

Within this definition, there is a fair amount of variation in how robust a persona may be including which attributes it brings forward, how well it captures common patterns within customer segments, and how evocative and relevant it is.

An **Attitudinal/Behavioral** persona (shown below) is created around distinctive behaviors that are somewhat independent of traditional demographic or life stage distinctions.

¹ See, for example, “Persona Best Practices: Developing Your Research Plan,” Forrester Research, 09/04.

Attitudinal/Behavioral Persona

1. Dreaming

I'd like to spruce up my kitchen. I remodeled a few years ago, but I'm ready for a change.

What would make an impact?

I'd like a more custom look: maybe I should get rid of the laminate countertop...

2. Scouting

From what I've seen on television, tile countertops are attractive, and would be much cheaper than other options.

- Do I have to remove my old counter?
- Will any ceramic tile work?
- Does it fit my budget?

3. Planning

I want to minimize the time that my kitchen is out of commission, so I probably need to work in stages.

- Have I thought of everything I need?
- What color grout would look best?
- Do I have all the supplies?

4. Building

I want to use the right tools for the materials I've selected, and watch out for common mistakes.

- Are things going together as planned?
- Does it match my original vision?
- It's not flush with my sinks. Help!

5. Celebrating

Wow, it took a little longer than I'd hoped, but it was worth it... what a difference! And I spent a LOT less than I might have.





- I want to take a picture before I set out all the appliances.
- My sister won't believe I did this myself. She'll probably want to know how I did it!



What Makes for a Quality Persona?

The best personas will also go the extra step to describe key behaviors such as a decision making process, an information browsing approach, or a shopping mode—the drivers that affect how people approach a given solution.

Sample Process: The Decision Making Lifecycle for Home Improvement Customers

Semi-Pro	Weekender	Beginner	Do-It-For-Me
			
<p>Profile</p> <ul style="list-style-type: none"> • advanced skills — may do jobs for pay occasionally • takes pride in doing a professional job, interested in process • has specialized tools, wants a complete workshop <p>Scenario</p> <p>When we bought our new-construction house, most of the components were "builder's grade." I've been updating a lot of the appointments to create more a custom-built quality like adding hardwood floors, crown molding, and built-ins, and a designer kitchen.</p> <p>My next project will be adding bay windows to the living room. We've always liked the open feel they provide.</p>	<p>Profile</p> <ul style="list-style-type: none"> • always learning • frequently doing things for the first time, but not afraid • fulfillment in doing job themselves • eager to understand options <p>Scenario</p> <p>Our old Victorian has a tiny (and ugly!) bathroom — it used to be a closet. Since it's so small, we want it to be nice. We are a little less concerned about cost than in past projects.</p> <p>The description should be fairly straightforward, but this is our first bathroom project and so we have to learn a few basics.</p>	<p>Profile</p> <ul style="list-style-type: none"> • willing to tackle the basics • "tight dirty" work, but no desire to become proficient • occasional DIY projects (seasonal) <p>Scenario</p> <p>The wallpaper and rickety shelving in our pantry finally got to us, so we decided to spruce things up on a whim one Saturday.</p> <p>We thought about painting directly on the wallpaper, but the close-cleat-tiled wall got a much better result if we stripped the wallpaper, and that it would not be that hard. The shelves were pretty easy to assemble using a drill and screwdriver.</p>	<p>Profile</p> <ul style="list-style-type: none"> • limited DIY experience • works as helper to contractor to save money, speed up project, and have occasional input • focused on project outcome <p>Scenario</p> <p>Our kids' toys are constantly in the way, so we decided to add a play room. Our contractor is asking us so many questions about what we want for our addition.</p> <p>We have to pick out everything from door knobs, to paint, to window treatments.</p>

These deeper persona models are important for understanding the levers that drive user behavior, be they those that support business needs (drive user registration) or those that satisfy user needs (accessing an intranet knowledge base or finding the perfect belt for a favorite suit). In other words, a strong persona will help to determine the practical design considerations such as features and content that a site should offer as well as provide a gauge for how well the site speaks to its audience.

Three Steps to Creating Quality Personas

The persona development process involves three basic steps:

1. Identify Target Research Segments

Most persona engagements begin with a review of a company's existing customer segments and supporting market research. Often, these documents will include customer demographic information such as location, age and income range, and preferences such as favorite magazines and places to shop for consumer segments, or job roles and responsibilities for employee or B2B segments. Potential segments can also be created from quantitative data which can then be enriched through qualitative research.

In any case, the design team must identify the user segments that are the highest priority for the company, determine the number of participants needed to represent each geographical location, recruit participants, and design and conduct research sessions. It can take up to two weeks to find and schedule research participants, longer if many different types of participants are needed or they are very specialized.

2. Conduct Qualitative Research with Real People

The research team usually consists of a user researcher and the project's Information Architect and/or Creative Lead. A collaborative approach helps provide multiple perspectives and a more robust analysis process. A research plan is then created based on the project's objectives. In addition to identifying the participants, the research team will define data collection techniques (such as ethnographic observation and interviews, diaries, or other methods), create field tools such as discussion guides, and prepare logistics for the field work.

This type of data collection is labor intensive, but the richness of the information collected more than justifies the effort. In particular, conducting research where the "action" actually takes place tells the researcher much more than the participant might reveal in an interview. Researching the user in the environment in which he or she will use the application reveals insights that can prove instrumental to a design effort.

3. Analyzing the Data and Developing Personas

The final step in the persona creation process is the most difficult and includes the selection of analysis tools, the analysis of the data gathered during research, and the crafting each persona. The analysis process includes looking for attitudinal patterns, contexts, and behaviors among participants in order to make meaningful distinctions between groups. Similarities are important to identify as well—they provide the platform needed to support the entire persona model.

Once the individual personas are defined, the design team brings them to life with full-blown descriptions that organize the research data in a way that will inform the design process. Some projects further synthesize key insights and their design implications by creating forward-looking user scenarios which illustrate how each persona might use the solution and how the design concepts may change user behavior.

Sample Scenario: The Home Improvement Process as Approached by Four Different Personas

	Dreaming	Scouting	Planning	Building	Celebrating
Semi-Pro	 <p>What types of projects will give me a new challenge?</p> <p>Which bay windows provide the most depth without the need for external support beams?</p>			<p>What's the best way to reinforce a load-bearing wall while I get the header in place?</p> <p>The temporary jig a friend told me about seemed radical, but worked perfectly! A lot of people could use this idea!</p>	
Weekender	<p>When visitors ask where the bathroom is, it's embarrassing... we need to update!</p> <p>Do any companies make small fixtures, with a distinctive design?</p>	<p>What tools and supplies will we need? Which supply lines are easiest to install?</p> <p>How should the flooring and toilet be installed? And which goes first? Uh oh, part of the sub-flooring looks rotten. HELL!</p>		<p>Wow, what a difference? Where are the old pictures we took? We gotta post before and after shots!</p>	
Beginner	<p>The painting is so dark and sticky, it's impossible to find anything!</p> <p>Are we better off renting a steamer, or should we buy the chemical-based wallpaper stripper?</p>	<p>Which strokes are the easiest to put together?</p>	<p>Do we have to bolt the shelves into the studs? Call-housed primer or latex?</p>	<p>That wasn't so bad! With the left-over paint, maybe we could do the laundry room in a few months!</p>	
Do-It-For-Me	<p>We never use the back porch: can that be turned into a kids' room?</p> <p>How can our addition have a new look, but also fit in with the rest of our house?</p>	<p>We are worried about dust. What kind of barrier should I ask my contractor to put up?</p>	<p>One of the subcontractors is chivving us along. Can't we find someone better?</p>	<p>Finally finished! It was worth it to stay on top of things. We're happy with the result.</p>	

Scope Considerations

Some of the factors that affect the overall price and duration of a persona project include the following:

- **Size and diversity of customer base** - A financial services company that serves the general public as well as small and medium-sized businesses has a much broader and diverse customer base than does a company offering computer games to 8-12 year-old-boys. When your customer base is broad or diverse, you need to interview and observe more representative customers to create a meaningful set of personas.
- **Geographic reach** - If geography affects how a business runs or serves its customers, or if regional differences affect customer behavior, the user interview and observation process is longer, more complex, and consequently more expensive than if these distinctions did not matter. This is particularly important for projects with global reach, as the differences in international culture can have a large effect on behavior.
- **Depth of behavioral frameworks** - For companies looking to leap frog the competition or to find an innovative new angle to their product or service, persona development needs to get much deeper into the drivers of behavior in their category. Ethnographic research, with multiple data collection methods, coupled with a more intensive analysis period, is needed to create insights, define processes, unravel decision-making, and build frameworks around the intended experiences.
- **Desire to quantify qualitative results** - Since persona development is usually based on qualitative research, some clients like to "test" the personas through a quantitative method such as surveying, and then size and prioritize personas based on combinations of surveys, business metrics and analytics. The testing period, coupled with any refinements identified as a result of that testing, adds time to the project as a whole.

Conclusion

Persona creation is generally a 4-8 week process, depending on the scope of the project. Although there are ways to shorten the process—cutting primary user research, for instance—the quality of insight the persona set would deliver would be compromised. Using a survey to ask users what they want will never be as valuable as discovering through direct observation what satisfies them, motivates them, or frustrates them. Achieving deeper insight into the drivers behind user behavior with quality persona development is the first step in harnessing the ability to influence that behavior in order to achieve business goals.

About the Author

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