

CREATING EFFECTIVE PERSONAS

An essential tool for true user-centered design

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Today's agenda

1. The trouble with personas
2. Persona fundamentals (plus a business case for them)
3. Empathy and demographics
4. Traditional persona methods gallery
5. How to do personas right (a radical approach!)
6. Workshop exercises: Persona-based design, makeover

The trouble with personas

All is not well...

I love personas!

- Personas are a valuable UX design tool, *if used properly*
- There's just one problem...
- Their track record isn't impressive

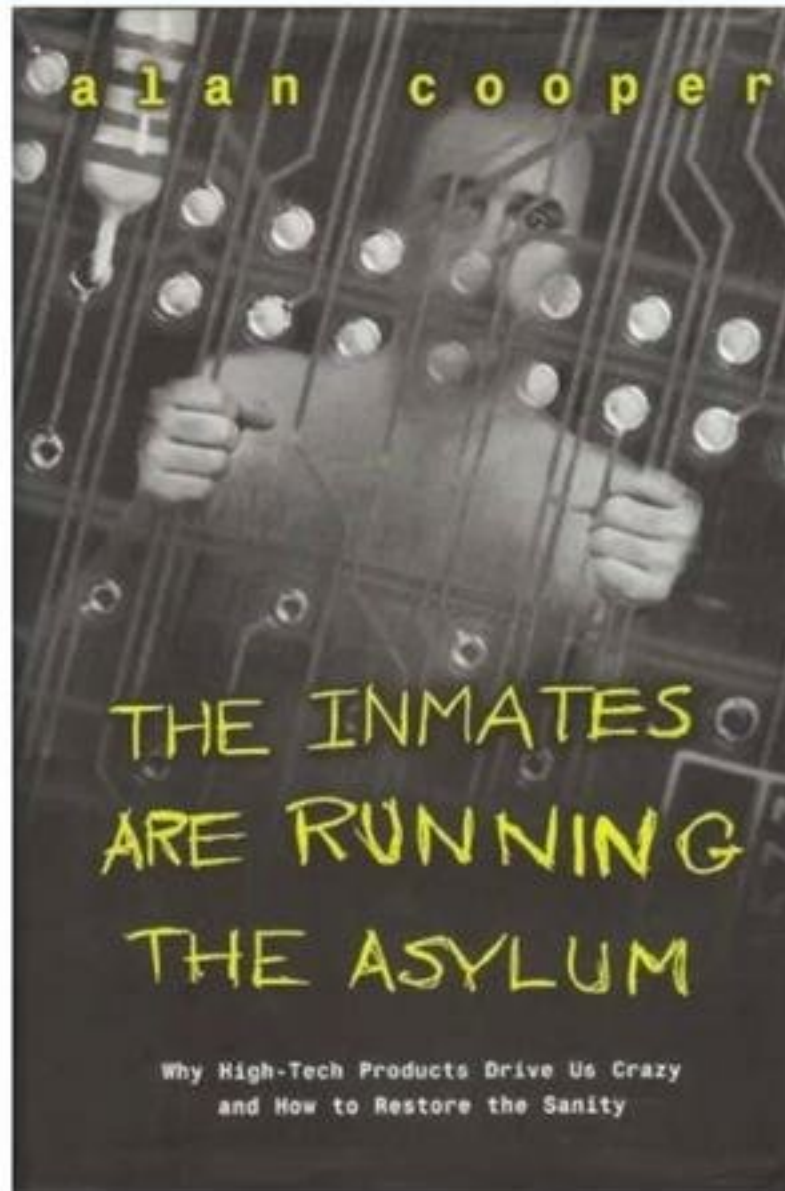


The 2001 CHI Interactionary

- A team-based design contest that takes place in front of an audience
- Each team (one at a time) takes on a design challenge for about 15 minutes
- The twist: A requirements change is announced with only 7 minutes left
- The design challenge
 - ▣ *Design a remote control for a child's dump truck toy*

cooper

Alan Cooper made personas popular



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What happened

- The Cooper team spent about 2 minutes on a persona (first thing)
- What's notable
 - ▣ They didn't use or refer to the persona even once
 - ▣ They absolutely should have!
- Why? The requirements change:
 - ▣ *Design for a child with a broken right arm.*
- The results: Disaster!

What should have happened...

What should have happened...

- They should have used the persona to stand their ground
 - ▣ We are designing this remote for our Timmy persona
 - ▣ While with empathize with children with broken arms, our target persona remains unchanged
 - ▣ Since the persona does change, our design doesn't change either
- Their original design was fine, even for a child with a broken arm
- Bonus: Spend time on accessibility and inclusion
- A key benefit of personas: defending against random changes!

Isn't there a consolation prize?

- *Wasn't the benefit of doing the persona the resulting collaboration and user empathy?*
- Umm...no...
- Personas have value only if they affect design decisions—positively
- *That's my only criterion for success!!*

There are hundreds of explanations

- Top theories
 - ▣ Poor/no user research
 - ▣ Personas based on assumptions!
 - ▣ Recommend another technique

Typical example: poor research

Personas are the containers of user research. They are only as good as the research behind them. Personas fail because of assumptions. Having personas is no substitute for user research with actual users. Garbage in, garbage out.

–Every article on Personas ever written

My theory: A failure of the basics

- If done properly, personas will deliver!
- No magic required

There's more than one way!

- How do you know if your personas are working?

There's more than one way!

- How do you know if your personas are working?
- A: Your team is actively using personas to make better design decisions, more quickly and confidently
- If that's your result, you are doing it right!

Persona fundamentals

Plus a business case for using personas

Who are your target users?

- ❑ Worst answer: Everybody!
 - ▣ Second worst answer: Yourself, your mom, your team/client
- ❑ It's impossible to design for everybody
- ❑ Requirements, feature lists, user story backlogs—give no insight!

Consider Windows 8

- Windows (all versions) has 1+ billion users worldwide
- Who are the target users of Windows?
- Isn't it literally everybody?
- Is designing for everybody a good idea?

Which is a more useful design target?

Everybody

VS...

Which is a more useful design target?

Everybody

VS...

Alicia is a small business owner. Currently, all her employees have modern Windows 7 PCs with large, high res (non touch) monitors. Her employees also have access to Windows 7 laptops, plus iOS and Android smartphones and tablets. Alicia's team is happy with their equipment, but she would upgrade to Windows 8 if she could justify the expense through improved productivity.

Consider Windows 8

- Windows 8 was designed for everybody...
- ...but not for me

What are personas?

- A *persona* is a strategically chosen fake person designed from real data, intended to represent a class of real users
- You can't design for everybody, so let's define specific targets
- Personas are a supplement to scenarios—they define the actor

Identifying personas

Choosing personas from the space of users



Persona politics: exclusion is inclusion

- Successful personas are about *exclusion*
- Current design trends favor *inclusion*
- How to reconcile:
 - ▣ Make a clear distinction between *necessary/helpful exclusion* vs. *unnecessary/harmful exclusion*
- Remember the worst target: Everybody

Choosing personas requires a strategy

- To be practical, you need a small number of personas
 - ▣ 6 – 8 is realistic, 20+ is not
- A good strategy considers these factors
 - ▣ Existing user base
 - ▣ *Future user base*
 - ▣ Organization roles
 - ▣ Usage lifecycle
- Who matters most for your product's success?

Typical persona user classes

Usage lifecycle

- ❑ First time user
- ❑ Beginning user
- ❑ Normal user
- ❑ Expert user
- ❑ Switching/dissatisfied user

Organization roles

- ❑ Administrator
- ❑ Purchase decision maker (also reseller, OEM)
- ❑ Industry influential
- ❑ Technical support, help desk
- ❑ Developer

Typical persona user classes

Organization types

- ❑ Individual consumer
- ❑ Small business, medium business
- ❑ Large business, enterprise
- ❑ Government/military

Budget/cost (SaaS option panels)

- ❑ Trial/value conscious
- ❑ Ordinary
- ❑ Big spender, wants everything/best, no hassle

Persona mechanics

- Name
- Picture
- Details (including some demographics)
- Relevant data for making and evaluating design decisions
- Not recommended: Filling in a template!

Using personas

- Use as a data-driven decision making framework
 - ▣ Easier to use research data in the form of a persona
- Identify and validate assumptions
- Persuade team, stakeholders
- Market strategy
- Ability to say “no,” prevent distractions

Why use personas?

- User-centered design...*requires user-centered design decisions*
- You can't hit a target if you don't have one!
- Personas and scenarios are the best user-centered tools we have!

Using personas—a typical example

- Team designing an app for renters
- Task: Submit a repair request
- Business goal: No phone calls!

Using personas—a typical example

- Team designing an app for renters
- Task: Submit a repair request
- Business goal: No phone calls!
- The task:
 - ▣ Apartment heater stopped working—file a repair request using app
- Our “persona”:
 - ▣ Working parents—at work during business hours
 - ▣ Two small children

Using personas—a typical example

- The finding:
 - ▣ The request process ended with “Submission successful!”

Using personas—a typical example

- The finding:
 - ▣ The request process ended with “Submission successful!”
 - ▣ Problem: No clue when to expect service!
 - ▣ Persona is calling the office!
- This is typical: Persona “wins” are small, fundamental but profound, often immediate user-centered insights

The alternatives

- Design for technology (features, user stories)
- Design for everyone
- Design for nobody (in particular)
- Design for ourselves, early adaptors
- Design for boss, boss's mom
- Design for a specific real person
- *Design based on raw user research*
- *Design for important clients, complainers, stakeholders*
- *Design for roles*

Personas vs. roles

- A role describe the job instead of the person
- Technical teams often prefer roles
- But we want the person, not the job...that's where all the insight is!

Phil the health care job hunter

- ❑ New to health care industry, possible first time
- ❑ Knows only basic job description vocabulary
- ❑ Prefers applying for jobs close to home or near public transportation
- ❑ Might browse, but only if easy to find, obviously relevant, and short
- ❑ Prefers to search to find things
- ❑ Familiar with Google, expects job search to work like Google search
- ❑ Will apply for jobs using smartphone, wants to avoid a lot of typing
- ❑ Knows only basic mobile gestures—tap is a sure thing, swipes maybe
- ❑ Has young children in school, prefers jobs with a flexible schedule
- ❑ Doesn't want to fill out forms without knowing that jobs are available and the expected compensation

Phil the health care job hunter

- Note that all the useful information is about Phil, not about Phil's role
 - ▣ Role drives features
 - ▣ Persona drives UX design decisions

What are you doing now?

Discussion

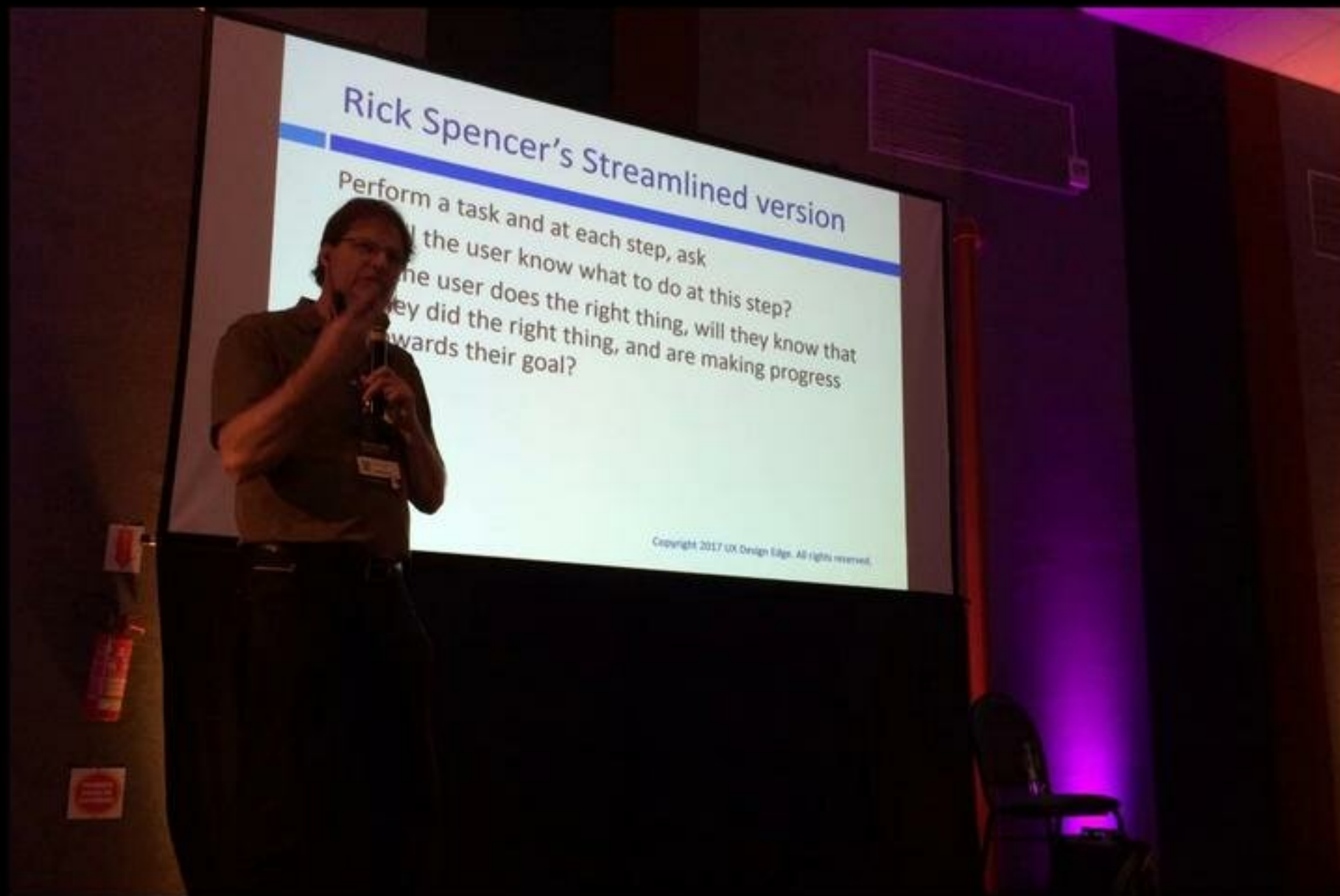
8 minutes

- ☐ Is your team and design process truly user centered?
- ☐ Are you using personas? Roles? Something else?
- ☐ What is your best way to communicate, apply, engage user data with your team?

Empathy and demographics

Do we need to empathize with our users...or just understand them







Director of Accounts

Goals & Objectives

- Wants to impress the boss
- Needs to show revenue
- Project driven, likes to complete tasks
- Wants success

Behaviors

- Likes to eat out, social
- Loves Facebook
- Serious at work, but likes to have fun
- Doesn't like big risks
- Networker

Traits



What can you do with this persona?

Empathize!!

Empathy has ruined personas!

Empathy has ruined personas!

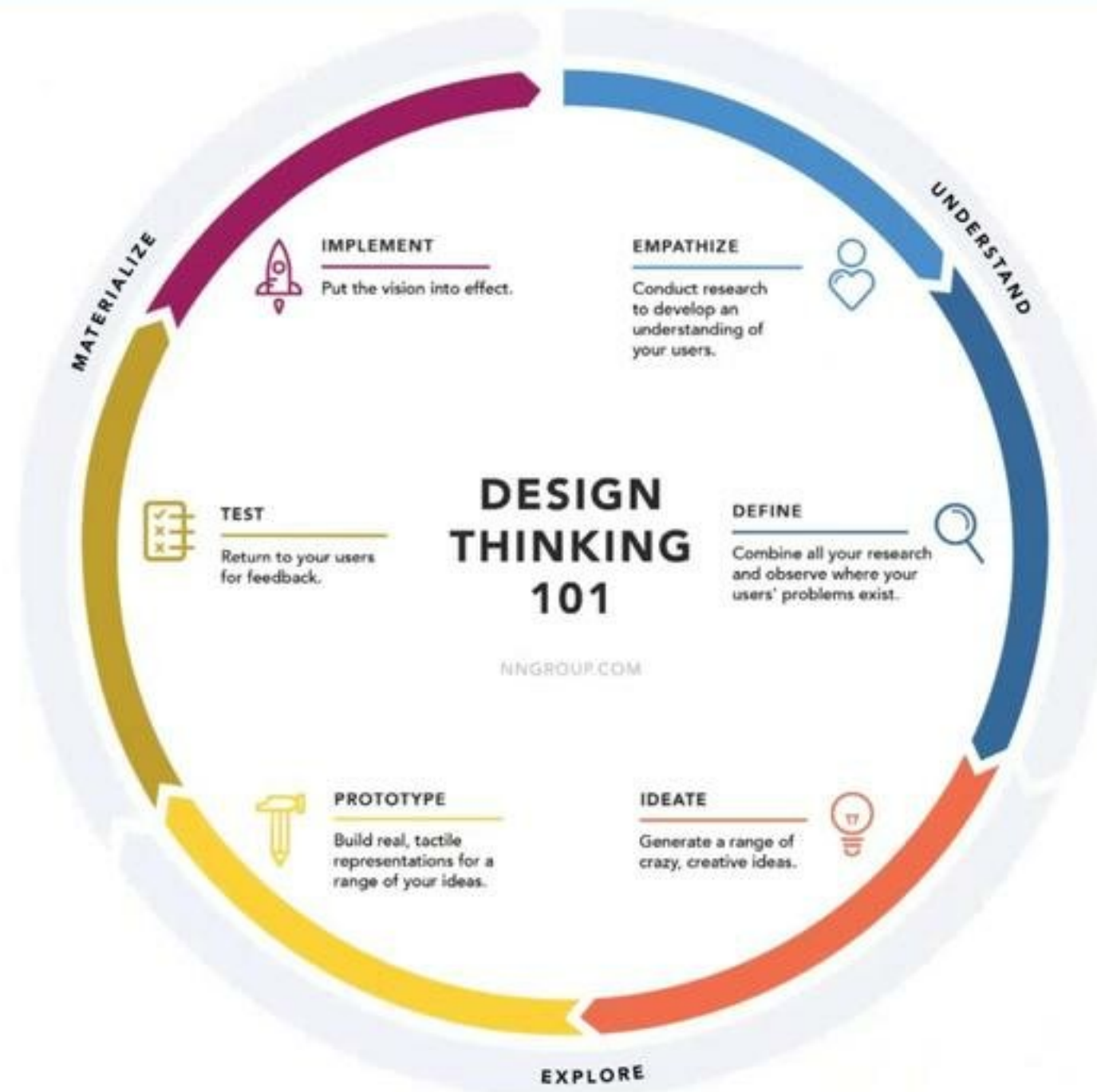
- We don't know what it is
- We suck at it!
- It's a distraction

What is empathy?

The capacity to deeply understand the inner experience of another person, allowing you to see and understand from that person's point of view

- More concisely: To understand your users
- But more often: To understand your users' feelings
 - ▣ Deep + inner = feelings

The first step of design thinking



From *Scenario-Focused Engineering*

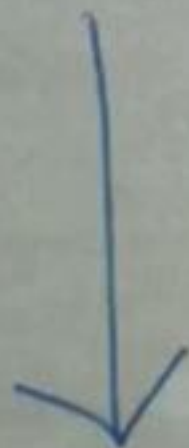
The idea behind empathy is to become so immersed in your customers' perspective that you can imagine what they see, hear what they hear, and understand the world from their point of view.

To do this, you must take off your own shoes—you must shed your own biases, attitudes, and preconceived notions, which are largely based on your own lifetime of personal experience.

From Scott Cook (Intuit)


There is a proverb I teach, that goes something like “Empathy is not just about walking in another’s shoes. First you must remove your own shoes.” You have to get past your own blinders and biases and assumptions before you can see with clear eyes what's really going on.

USERS



Even The Oatmeal doesn't get it!

Just a few “minor” changes.



So this design is perfect, but I'm the CEO so I feel obligated to make changes to feel like I've done my job properly. Also, I'll use phrases like “user experience” and “conversion oriented” to sound smart even though I barely know how to use a computer.

Could you make the design “pop” a bit more? It needs to be more edgy. It doesn't quite feel right. *

* Author's note: Clients have actually said all these things to me. To this day I still don't know what “pop” or “edgy” mean in regards to web design. I also don't know how to design websites based on someone else's feelings.

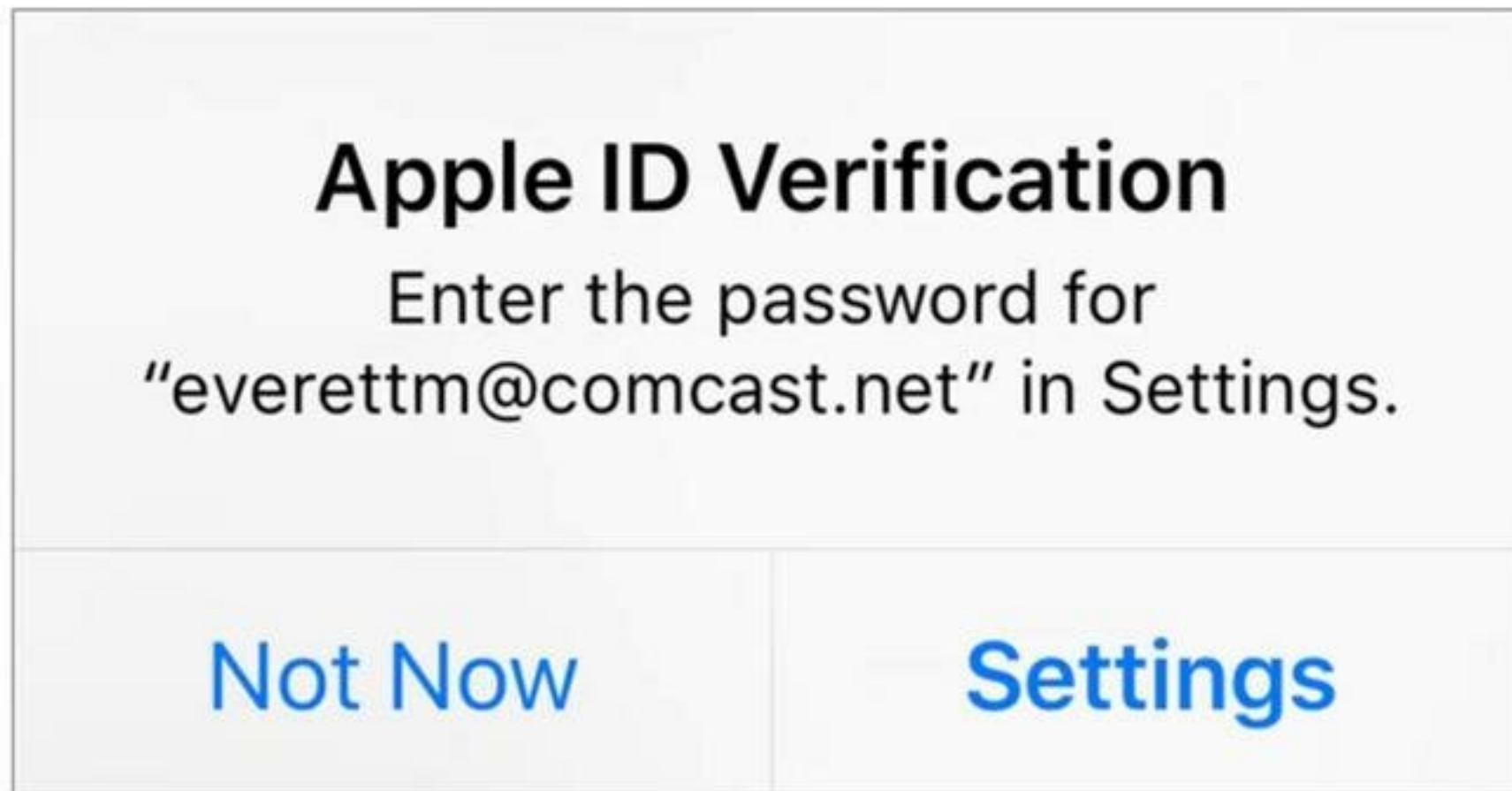


**SHOW ME
THE EMPATHY!**

Show me the empathy!

- ❑ Designing based on a feature list...isn't empathy
- ❑ Designing based on raw data/SEO...isn't empathy
- ❑ Making difficult to sign in...isn't empathy
- ❑ Constantly displaying annoying reminders...isn't empathy
- ❑ Deleting my input on error...isn't empathy
- ❑ Displaying popup ads...isn't empathy
- ❑ Forcing unfair Terms of Use...isn't empathy
- ❑ Dark patterns and manipulation...isn't empathy

Show me the empathy!



Apple ID Verification

Enter the password for
"everettm@comcast.net" in Settings.

Not Now **Settings**

Empathy + personas = demographics

- Our obsession with empathy leads to demographic-focused persons with vague assertions
- ...to help us empathize
- Just one problem: They are mostly useless

Boom! There's your persona!

- ❑ I know how to design for someone who is value conscious
- ❑ I know how to design for someone who is pressed for time
- ❑ But I have no idea how to design for a 27 year old single mom
- ❑ ***To make personas work, forget about empathy and focus on understanding your users (and how to achieve their goals!)***

Boom! There's your persona!

- ❑ Give specific, relevant attributes that can influence design decisions
- ❑ Don't make me guess what your factoids mean
- ❑ Demographics alone always require guessing

To be clear: Empathy is great if it works

- *Because Emily is value conscious, the design should:*
 - ▣ *Make it easy to find products on sale*
 - ▣ *Clearly mark discounted items, and show the discount*
 - ▣ *Make it easy to comparison shop*
 - ▣ *Provide low-cost shipping options*
- *Because Emily is a 27 year old single mom, the design should:*
 - ▣ *???????*

What's wrong with a little empathy?

Discussion

6 minutes

- ☐ Change my mind....
- ☐ Have you found empathy useful?
- ☐ Does your team really walk a mile in other people's shoes?
 - ☒ Do you really need to understand your users' *feelings*?
- ☐ Can we have a *deep understanding* of our users...and keep our own shoes?

To be clear: Empathy is great if it works

- *Because Emily is value conscious, the design should:*
 - ▣ *Make it easy to find products on sale*
 - ▣ *Clearly mark discounted items, and show the discount*
 - ▣ *Make it easy to comparison shop*
 - ▣ *Provide low-cost shipping options*
- *Because Emily is a 27 year old single mom, the design should:*
 - ▣ *???????*
- *If it doesn't work, why pretend?*

Traditional persona methods gallery

Dissin' other approaches

Alternative persona methods

- ❑ Compiled research data (the 20 pager)
- ❑ Online dating profiles
- ❑ Two-page template-based profiles (fill in the blanks!)
- ❑ Recycled marketing demographics
- ❑ Proto-personas
- ❑ Going through the motions
- ❑ Your mom

Persona evaluation criteria

While there is no one right way, you can evaluate persons objectively with these questions

- Is the information I need to make user-centered decisions here?
 - ▣ And easy to find and interpret?
- For each attribute, can I complete this sentence
 - ▣ *Because <persona name> <persona detail>, the design should <sensible conclusion>*

Compiled research data (the 20 pager)

- ❑ Dedicated user research time compiles extensive data, creates a large document that describes each persona in detail
- ❑ Sounds great, right!

Compiled research data (the 20 pager)

- ❑ Dedicated user research time compiles extensive data, creates a large document that describes each persona in detail
- ❑ Sounds great, right!
- ❑ Surprisingly ineffective in practice
 - ▣ Filled with many irrelevant details
 - ▣ We don't care about kids, coffee, cars, cats, etc.
 - ▣ Fact: Your team won't read these long documents
 - ▣ Instead, people often just assume what these personas want/need
- ❑ The test: Designing a search feature
 - ▣ Guess how much data was there on search?

Online dating profiles



Brad

**27, Web Developer
Lives in Stoke Newington**

Likes

Beer, Whinging, Web Standards,
Cycling, Trolling on IRC

Dislikes

Boris Johnson, Bad Websites, Bad CSS

Online Behaviour

Reading RSS Feeds, Posting on Forums,
Twitter, Flickr, Bitching on Blogs

Two page (template-based) profile

- Design team (perhaps researchers) compiles data (and implicit assumptions) into an attractive, two-page profile
- Sounds great, right!
- Surprisingly ineffective in practice
 - ▣ Filled with many irrelevant details, esp demographics
 - ▣ We *still* don't care about kids, coffee, cars, cats, etc.
 - ▣ Mostly going through motions, filling in blanks
 - ▣ Profiles ultimately not used
- The test
 - ▣ *Because <persona name> <persona detail>, the design should <sensible conclusion>*

The two-pager profile template

"Useless demographics" Paul



"A quotation that captures this user's personality."

Age: 1-100

Work: Job title

Family: Married, kids, etc.

Location: City, state

Character: Type

Personality



Trait 1

Trait 2

Trait 3

Trait 4

Goals

- A task that needs to be completed.
- A life goal to be reached.
- Or an experience to be felt.

Frustrations

- The challenges this user would like to avoid.
- An obstacle that prevents this user from achieving their goals.
- Problems with the available solutions.

Bio

The bio should be a short paragraph to describe the user journey. It should include some of their history leading up to a current use case. It may be helpful to incorporate information listed across the template and add pertinent details that may have been left out. Highlight factors of the user's personal and of professional life that make this user an ideal customer of your product.

Motivation

Incentive



Fear



Growth



Power



Social



Brands & Influencers



Preferred Channels

Traditional Ads



Online & Social Media



Referral



The two-pager profile template

Clark Andrews

AGE 26
OCCUPATION Software Developer
STATUS Single
LOCATION San Jose, CA
TIER Experiment Hacker
ARCHETYPE The Computer Nerd

Friendly Clever Go-Getter



"I feel like there's a smarter way for me to transition into a healthier lifestyle."

Motivations



Goals

- To cut down on unhealthy eating and drinking habits
- To measure multiple aspects of life more scientifically
- To set goals and see and make positive impacts on his life

Frustrations

- Unfamiliar with wearable technology
- Saturated tracking market
- Manual tracking is too time consuming

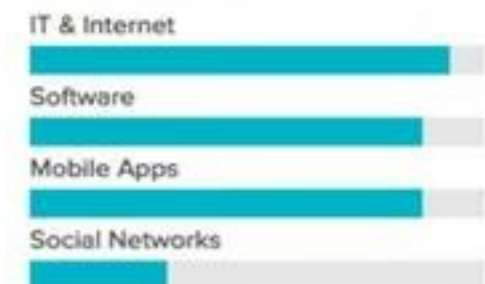
Bio

Aaron is a systems software developer, a "data junkie" and for the past couple years, has been very interested in tracking aspects of his health and performance. Aaron wants to track his mood, happiness, sleep quality and how his eating and exercise habits affects his well being. Although he only drinks occasionally with friends on the weekend, he would like to cut down on alcohol intake.

Personality



Technology



Brands



Recycled marketing demographics



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Proto-personas

HOW PROTO-PERSONAS ARE MAPPED

NAME 	BEHAVIORS 
DEMOGRAPHICS 	NEEDS/GOALS 

A PROTO-PERSONAS WITH EXAMPLE INFORMATION

JANE 	BEHAVIORS <ul style="list-style-type: none">- Avid blogger- Doesn't like 24 hr news- Twitter user- Loves to eat pudding- Online extrovert
DEMOGRAPHICS <ul style="list-style-type: none">- 20-30 yrs old- Female- College Grad- Non-leadership white collar job- Economics major	NEEDS/GOALS <ul style="list-style-type: none">- Ego gratification- Wants to be heard- Engage with humans- Loves to find cool stuff and hang out with the "cool crowd"

Your mom

- Everybody's mom is the original persona

Your mom

- Everybody's mom is the original persona
 - ▣ *I would never do that!*
 - ▣ You are designing for yourself
 - ▣ *OK, fine! My mom would never do that!*
- Unless your mom is really the target user, please don't do this

A consolation prize



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Too harsh?

Discussion

8 minutes

- ☐ Change my mind....
- ☐ Are you using these other approaches successfully?
- ☐ Give examples, details

Doing personas right—radically!

Enough complaining, let's fix this!

How to do personas right

- ❑ Forget empathy and irrelevant demographics....
- ❑ Create a *simple* user model for *specific* tasks, features
 - ▣ *Focus* on useful details for making design decisions
 - ▣ Include only the relevant details
 - ▣ Don't bother to make it feels like a real person
- ❑ Make design decisions based only on the model
- ❑ Look for discrepancies—they reveal problems

Key differences

- Task specific (small and focused vs. big and general)
 - ▣ Most should fit on a 3"x 5" card

Key differences

- Task specific (small and focused vs. big and general)
 - ▣ Most should fit on a 3"x 5" card
- Top down, need driven (vs. bottom up, data driven)
 - ▣ Consider your target user class strategy
 - ▣ *What do you need to know* to make better decisions for specific tasks
 - ▣ Focus on the person's relationship to the task
- Skip the irrelevant details (the 4 Ks)

Key differences

- Keep them simple and focused on what you are designing
- Your team's data needs drive the persona process
- *If an attribute doesn't help make better decisions (or evaluate decisions), why include it?*

Useful persona attributes

Different users have different characteristics:

- ❑ Computer, mobile knowledge, gestures (expert vs. novice)
- ❑ Domain knowledge (expert vs. novice)
- ❑ Goals, tasks (what they are going to do)
- ❑ Frequency of using apps, doing tasks (heavy vs. light UI)
- ❑ Vocabulary (to speak the user's language)
- ❑ Motivation (willing to make effort, endure misery)
- ❑ Environment (where they work, data, scale, access to info)
- ❑ Age, physical abilities, budget

Where does the data come from?

- ❑ User research (formal vs. GOOB)
- ❑ Analytics, data mining (Google)
- ❑ What we already know
- ❑ Observation, facts about all users, inclusion
- ❑ Our assumptions

Traditionally first two are emphasized, everything else is ignored

Step 1: The persona lifecycle

As a team

1. **Agree on the process** Agree how decisions are made, how personas are used
2. **Determine a strategy for selecting personas** Consider importance, market share, future users
3. **Choose the personas** Brainstorm, prioritize, apply strategy, aim for 8 max—based on what you need

Step 2: The persona lifecycle

For each persona

1. **Determine differentiation** What makes this persona different from the others?
2. **What do you need to know?** To design for this persona—let your data needs drive
3. **Determine the attributes** See the previous list
4. **Low-risk assumptions are OK**
5. **Determine need for research** Review sources, credibility, context, freshness
6. **Give a name, photo** ...and some basic demographics

Step 3: The persona lifecycle

- Suppose we are creating a persona for someone buying a first home in Chicago and we are evaluating a proposed design
- I want to know enough detail about what the user is doing to perform basic tasks as they would
- Compare
 - ▣ *Pat wants to buy a home in a Chicago suburb*
 - To
 - ▣ *Pat wants a single family home, works in Avondale, and wants at most a 30 minute commute—using public transport*

The persona lifecycle, part 3

- Suppose we are creating a persona for someone buying a first home in Chicago and we are evaluating a proposed design
- See the problem?

dreamtown | we know chicago real estate

[Search](#)[Neighborhood Search](#)[Suburb Search](#)

For Sale



Type a Neighborhood, Address, Suburb or Zip Code to begin searching



What's your home worth? Get a free home evaluation instantly >>

NOW PLAYING: LINCOLN PARK



Your Definitive Guide to Chicago Real Estate

Chicago homes include an amazing array of properties—from vintage single-family homes to luxury condos and everything in between. The city is also f



Step 3: The persona lifecycle

For each persona

7. **Add enough detail so that you can perform typical tasks as the persona would**

Step 3: The persona lifecycle

For each persona

- 7. Add enough detail so that you can perform typical tasks as the persona would**

Pat wants a single family home, works in Avondale, and wants at most a 30 minute commute—using public transportation

We aren't saying we have data that everyone in the persona class wants this—but that this is a typical example of what a real person might do

Step 4: The persona lifecycle

When making design decisions

1. **Apply the persona attributes** The entire point!
2. **If there is a discrepancy**
 - ▣ The decision might be wrong
 - ▣ The persona might be wrong
3. **Constantly challenge and improve the personas** Look for mistakes, missing/irrelevant attributes, bad data, incorrect assumptions
4. **Constantly look for user research needs** To correct the bad data and assumptions

Step 5: Consider mobile personas

- While we are the same person when using a mobile device, we are a different persona
- Why? Remember that a persona is a *simple* user model for specific tasks, features
- To keep effective personas simple and practical, they don't address mobile unless explicitly required

A generic mobile persona

- Phone is personal, tablet is shared; uses phone all day, tablet more at night; phone is more mobile
- Could be anywhere, but probably at home or office but might be in restaurant, car, with friends and family
- Doesn't know your app well, so has to relearn each time
- Don't want to type much, prefers using a single hand with thumb when mobile, will switch holding pattern as needed
- Doesn't know advanced gestures (double tap, tap and hold, shake, edge swipes)
- Has low motivation, will quit if task takes too long
- Might not have good connectivity, or any if travelling
- Has alternatives (phone call, PC, actual human contact)
 - Threshold is highly age and culturally dependent

Step 0: Get your team on board

- Personas work best when everyone on your team understands their value and is using them
 - ▣ Don't take this for granted!
- Best way to get your team on board: lead by example!
 - ▣ Show an awesome design decisions made using personas
- **This entire process is a waste of time if you create personas and not use them!**

Show, don't tell!

- Using a real, compelling example is the best possible way to change peoples minds
 - ▣ You can't do this with an abstract argument
- Take a real example of poor UX, create a persona (and some scenarios), and use improve the design
- Keep track of time
- Show the value!

How to make your devs hate you

- We give personas names and faces to make them look like real people
 - ▣ We are designing for people, not robots or roles
 - ▣ Helps get beyond mechanical usability
- But taking empathy too far means your devs won't take your personas seriously
 - ▣ Devs have a low tolerance for BS
 - ▣ Irrelevant, overly personal details don't help, they harm

How to make your devs hate you

- The “Betsy” persona



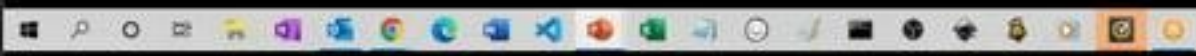
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Is your team on board?

Discussion

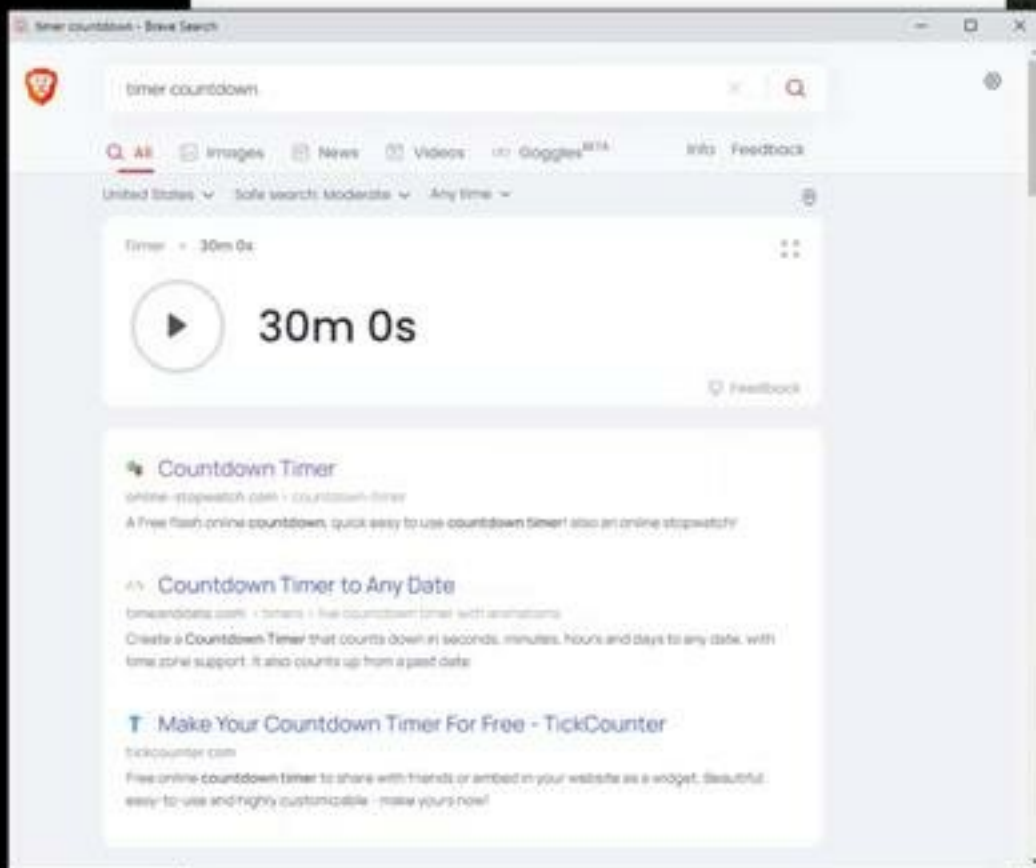
8 minutes

- ❑ Is there resistance to personas?
- ❑ What is the problem? Lack confidence, results?
- ❑ What can you do to change perception, demonstrate value?



How to make your devs hate you

□ The “Betsy” persona



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Workshop exercises

Time to get hands-on!

The challenge: Chicago home buyer

- Suppose you are designing an app for home buyers in Chicago—let's design a persona for a first-time buyer
- But to save time, let's do a makeover of an existing persona

Pat, First-time Home Buyer

Xtersio



"This is a big purchase--I want to make a good decision."

Age: 27

Work: Market researcher

Family: Single, no children

Location: Chicago, IL

Income: \$110,000 per year

Personality



Busy

Not confident

Financially conservative

Profile

- Works for a large retailer as a market researcher.
- Currently lives in an apartment in a Chicago suburb.
- Has saved enough for a down payment.
- Wants to live closer to the city to be closer to family and work. Current commute is over an hour.
- Is very busy with work and personal life, so wants home search and purchasing process to be efficient as possible.

Goals

- Wants an efficient home search process.
- Wants to look at all possible home matches.

Beliefs

- Thinks he knows what he wants in a home.
- Isn't confident about purchasing a first home, wants to involve others.
- Afraid of buying the wrong home and not being satisfied.
- Reluctant to spend all his savings as a down payment.

Site business goals

- To be the "go to" site so that Pat doesn't look at competitors.
- Weed out lookers from serious buyers.
- Make in-person realtor time more efficient.
- Get Pat to register at the site.

Motivation

Incentive

Fear

Growth

Power

Social

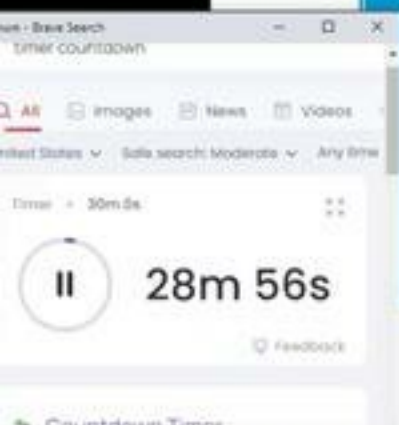
The challenge: Chicago home buyer

Exercise

30 minutes

1. Start with a clean slate—brainstorm what you need to know for this user
2. Review the persona, is anything missing?
3. For each attribute, complete this sentence
Because <persona name> <persona detail>, the design should <sensible conclusion>
4. Do a makeover—fix anything you don't like
5. Don't worry: we can do research later!

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Pat, First-time Home Buyer

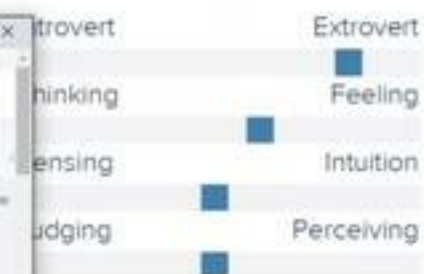
Xtensio



"This is a big purchase--I want to make a good decision."

Age: 27
Work: Market researcher
Family: Single, no children
Location: Chicago, IL
Income: \$110,000 per year

Personality



Busy

Not confident

Financially conservative

Profile

- Works for a large retailer as a market researcher.
- Currently lives in an apartment in a Chicago suburb.
- Has saved enough for a down payment.
- Wants to live closer to the city to be closer to family and work. Current commute is over an hour.
- Is very busy with work and personal life, so wants home search and purchasing process to be efficient as possible.

Goals

- Wants an efficient home search process.
- Wants to look at all possible home matches.

Beliefs

- Thinks he knows what he wants in a home.
- Isn't confident about purchasing a first home, wants to involve others.
- Afraid of buying the wrong home and not being satisfied.
- Reluctant to spend all his savings as a down payment.

Site business goals

- To be the "go to" site so that Pat doesn't look at competitors.
- Weed out lookers from serious buyers.
- Make in-person realtor time more efficient.
- Get Pat to register at the site.

Motivation

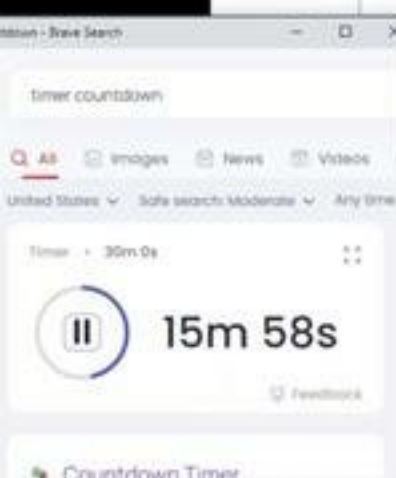
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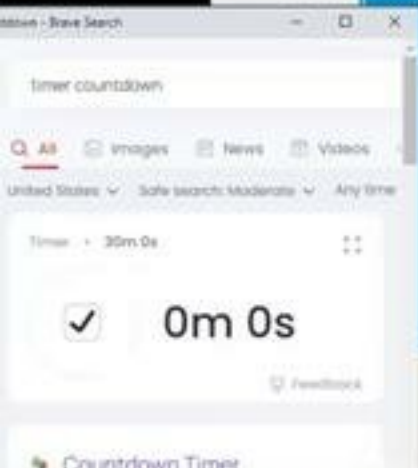
The challenge: Chicago home buyer

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The challenge: Chicago home buyer

Exercise

My answers (no peaking!)

The challenge: Chicago home buyer

Exercise

My answers (no peaking!)

1. Start with a clean slate—brainstorm what you need to know for this user
 - ▣ **Need to be able to search for homes as Pat would!**
 - ▣ Price range (need specific down payment)
 - ▣ Type of home, bedrooms, bathrooms, garage
 - ▣ Neighborhoods for house, work, family
 - ▣ How does Pat get to work?

The challenge: Chicago home buyer

Exercise

2. Review the persona, is anything missing?
 - ▣ Almost everything required for design decisions is missing!
3. For each attribute, complete this sentence

Because <persona name> <persona detail>, the design should <sensible conclusion>

 - ▣ Because Pat is single with no children, he doesn't care about neighborhood schools
 - ▣ Wrong! We can't even say that!

The challenge: Chicago home buyer

Exercise

4. Do a makeover—fix anything you don't like
 - ▣ Make everything more specific
 - ▣ Best bad example: *Thinks he knows what he wants in a home.*
 - ▣ Did you see the contradiction?
 - Wants an efficient home search process
 - Wants to look at all possible home matches

The challenge: Chicago home buyer

Exercise

Do you see the value of personas?
(If done properly!)

If you remember only 7 things...

If you remember only 7 things...

1. We need to understand our target users, but empathy and demographics are often distractions. Please continue to wear your own shoes!
2. We can fix personas by making them simple user models focused on specific tasks and features
3. Include demographics and personal info only if relevant—otherwise they get in the way
4. We know a lot about our users already, let's leverage it
5. There's value in tracking assumption personas—use them to start the process, identify and validate assumptions, and determine research needs
6. You can use personas with limited time—expensive personas aren't necessarily better
7. The ultimate test: If your team is actively using personas to make better design decisions, you are doing it right!

Questions

Feel free to ask me questions
everettm@uxdesignedge.com