

Personas and Scenarios

“You know you’ve been bitten by the information design bug when you begin to understand that the power of information design lies in the way it can be used to help people, to make their lives easier and better by providing serious, even life-saving communication.”

—Robert Swinehart

PERSONAS: IMAGINING USERS

If successful information design requires a thorough understanding of and commitment to the audience, creating personas (sometimes also referred to as user profiles) is an easy and fun way to walk a mile in the shoes of your users.

During the initial research phase, you and your client identified target audiences. As you move into design development, well thought-out user profiles detail the relevant information about the personalities and expectations of representative members of your audience. User profiles provide a touchstone for the project team to make sure that design choices are aligned with user needs and expectations.

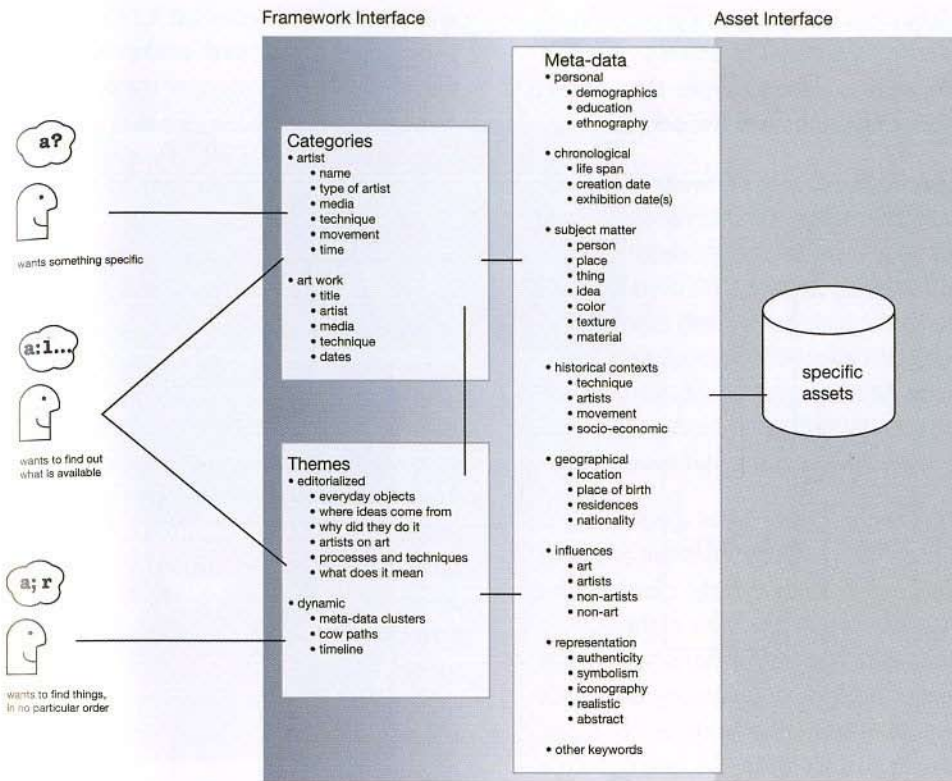
So while you may have identified your target audience as working mothers in their forties, having a persona for one particular working mother in her forties is infinitely more useful. Giving depth and details to the user’s character helps you see the target audience member type as a full person with a wide range of needs and expectations. The idea is to be able to imagine fully how a particular user will interact with your design.

Cost-conscious, Yet Surprisingly Effective. How do you learn about a user or set of users and their needs and expectations? One can spend the time and budget seeking out and interviewing real people

who fit a project’s user demographic and then distill that information into real-world user profiles. However, the simplest, most cost-effective method of generating user profiles is to formulate them yourself based on research, common sense, and overall project know-how.

In the pragmatic world of information design, it may seem odd to be prompted to invent imaginary users the way you might have invented imaginary friends when you were five. Nevertheless, invented users can be a budget-conscious, time-sensitive, and extremely valuable device to help you and your team make decisions about the project at hand. Of course, you can’t just haphazardly invent any old user. It’s a good bet that Plimmy—the imaginary, orange, 7-foot (2.1 m) dragon who protected you from the mean kids on the kindergarten playground—will not assist you at all in your project efforts. This chapter outlines a general methodology to assist you in the process of creating personas that are relevant and useful to your project.

What Is a Persona and How Many Will You Need? A persona is a brief profile of a typical user that outlines specific personality attributes, desires, needs, habits, and capabilities. Often fictional, a persona can be a composite, or representative of a typical user (rather than an actual real-world user). If your audience encompasses



← This process document for the Making Sense of Modern Art (MSOMA) kiosk at San Francisco Museum of Modern Art describes a framework that establishes relationships between content and users.

Method

→ The MSOMA kiosk's final user interface design incorporates user wants and needs that were identified during the project's planning stages. The modular interface highlights individual artists, as well as content types such as guided tours, videos, and timelines. Information is organized so that users with varied goals can explore the content in the way that best suits their browsing habits.

Method



THE DESIGNER

The Architect/Designer is primarily concerned with aesthetics in the finishes she chooses. Carpet often serves as the “foundation” for a design—other finishes are based on it, but material composition is of no concern. Inexperienced designers are often responsible for pulling and specifying finishes.



“Talk to me in my terms.”

Color and pattern, not components or construction are of primary concern. What matters is what’s cool, unique, and will make a name for the firm and the individual. All other people in the process work in service to the design – if there’s an installation problem it’s the installer’s fault; the mill is expected to accommodate change and high delivery demands.

“Help me shine.”

Success is measured in terms of her client roster and her portfolio. Recognition is very important, both in the firm and in the architecture and design community at large. High profile projects and custom products carry great caché.

“Help me see the value.”

The designer wants assurance that the finished project is true to the original vision and even true to the specification. Product knowledge comes from product representatives. Deeper understanding of product composition is welcome to the extent that it serves aesthetics.

↑ This persona includes a photo of the user, which lends a sense of reality to the entire piece. Particular user goals for this character are highlighted with a quote, which effectively gives the user a voice to communicate what the user type really wants.

Matter

many kinds of users, you’ll probably need to create a series of personas that reflect the range in audience types. Most projects require about three to five personas.

How Do You Create Personas? First, you need to identify your main audience types. Ask your client for specific details. Talking with the client about their users can both clarify the audience list and raise new questions about the types of users the client wants to target. Research the client’s business landscape for further ideas and information about the user base.

Next, create a short list of specific attributes for your most common audience types. Again, work with the client to hone the list of attributes. Some of these attributes will be more general, such as age, gender, profession, geography, and education. Some of the attributes will be more specific to the project, like how often the person might use the “product,” whether the person is comfortable with new technology, or whether the person likes to read.

Sometimes the demographics (age, gender, and socioeconomic status) are less important than the psychographics (personality, values, attitudes, interests, or lifestyles).

Who Creates the Personas? A single person on the team, such as the designer, the information architect, or the project manager, can create the personas. However, a group work session with the design team and the client team is one of the best ways to generate a set of personas. Not only do you gather more creative input during a collaborative process, but the act of creating personas is a great team-building exercise at the start of a project.

The client team, especially at project inception, will generally know more about their users than you will. On the other hand, you, as the designer, will often ask valuable questions, and even question certain client assumptions. For example, when discussing a Web project, the design team might inquire about the user’s computer equipment and home environment, and how that might impact browsing habits and time spent online.

So go ahead and gather the team in a room with a whiteboard, coffee, and a few snacks, and have a group work session to come up with each of the personas based on the predetermined set of user attributes and criteria.

Document Your Efforts. Once you’ve gathered all the data for your personas, create a document featuring the fruits of your labor. Each persona should include all the pertinent criteria and attributes. It also helps to have a picture of each character. Give each persona a name, too. Giving each persona a name brings the user to life, encourages empathy, and makes the discussion infinitely more personal.

The TV Lovers Snapshot

Miguel, Maria, and Pablo Martinez, Pasadena, CA



Married — 1 kid
Mid income

3 bedroom house: 1,800 sq. ft. / 165 sq. m.
Wired

Family

Miguel (32 / Regional Sales), Maria (32 / School Teacher),
Pablo (5)



Services

Digital cable + DVR + broadband
Netflix / Blockbuster
Vorrage

Living Room

32 in. LCD
Cable STB with HD DVR
DVD player

Master Bedroom

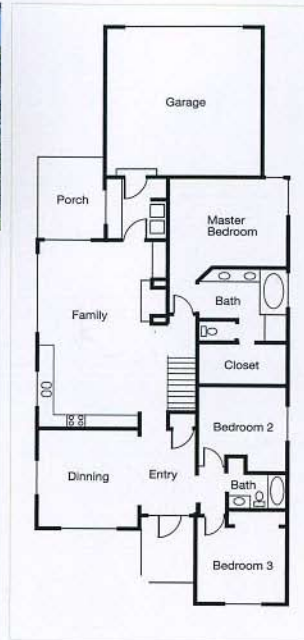
32 in. CRT TV
Shelf Stereo
DVD player
Cable, but no STB
Personal laptop

Dad's Media Room

50 in. rear projection
Cable STB with HD DVR and a Slingbox
All-in-one HTS
PS2

Travel

Work laptop with Slingbox access



← This persona by Method gives details about potential users.
Method

Even if the project isn't Web-based or technology-related, it might be interesting to know how your persona interacts with such devices. For a cookbook design, you may want to know which cooking websites, magazines, and cookbooks the user likes.

Details give your persona dimension and character. It's often helpful to include information that shows how the user relates to your project or client goals. Personas can be as specific as you need them to be. If it helps to know exactly what Joe thinks about your product, service, or information design issue, by all means, give the guy an opinion about it.

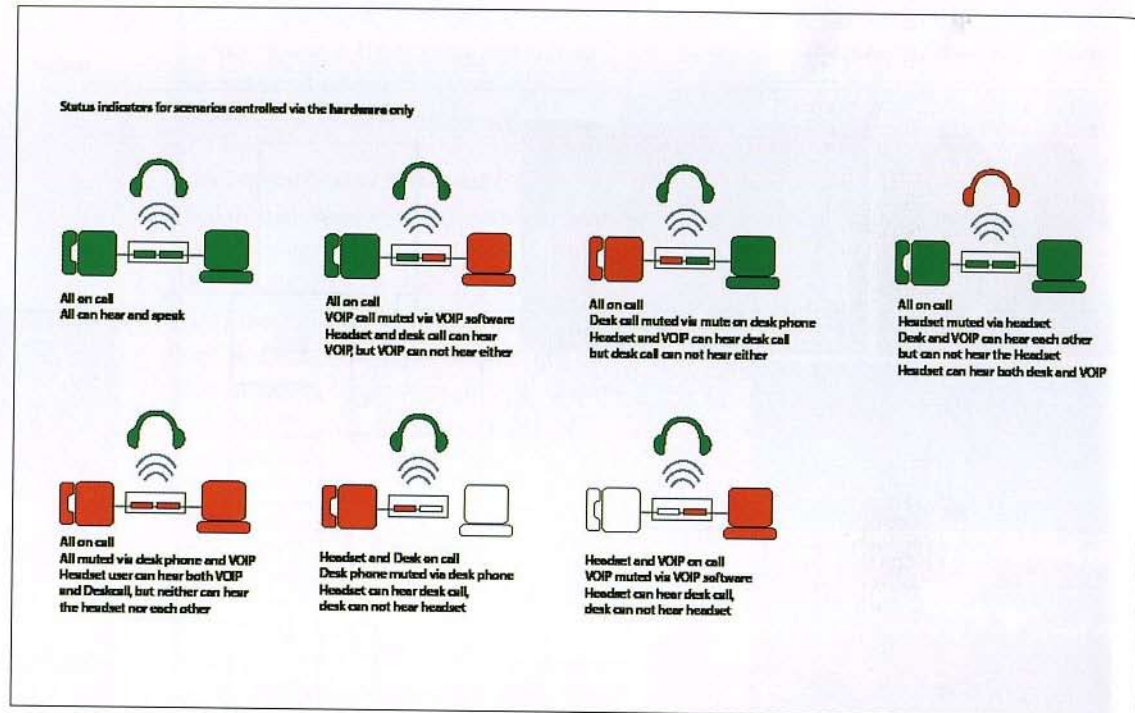
Information about personality can also help you make decisions about your information design. For example, if your key users are impatient by nature and, thus, only want the broad strokes and "big picture" information, then your information design choices will differ significantly than if your users are very patient, literate, and detail-oriented in approach.

When the personas are fully cataloged, distribute the document to the team.

How Do You Use Personas? Once you have the personas in hand, it's easier to understand the audiences and prioritize them. It helps to rank the importance of each persona in terms of project needs and goals. Not only do you have a set of representative users in hand, but you now know which users and their needs are the most critical.

Having personas as a reference while you work on the project helps to create empathy and a deeper understanding for user needs and how the particular audience types might respond to your design. Personas can be quite useful in making distinctions and choosing between design options. For

→ This early process document by Method shows the details and functionality scenario for the software and hardware for a phone system, including a visual representation of the concept. **Method**



instance, if you know your most important demographic is a hip, urban, artsy audience of 25- to 35-year-old females, you may choose a different design than if your audience is a hip, urban, artsy audience of 25- to 35-year-old females who have children. The overall demographics and personality attributes may be very similar. However, the specifics of the personas shed light on key differences that can influence user behavior in a pronounced way.

You'll be surprised at how often clients and design team members will refer back to the personas when making decisions throughout the length of the project.

SCENARIOS SHOW PERSONAS AT WORK

Personas are like actors. Now that you've got your cast in place, it's a good idea to have your imaginary users act out the process of interacting with the information design in question.

Scenarios help you identify specific patterns in how users interact with information design. Like the personas themselves, scenarios help you confirm that your design satisfies the needs of the target audience.

A scenario can be a story written in narrative form or another form such as a flowchart or diagram. Scenarios can be very specifically related to one task flow such as how a user completes a specific transaction with an online system to purchase a building permit. Or scenarios can be more general in telling the story of how a particular user interacts with the system over time and through a variety of touch points. You can decide how general or how specific your scenario needs to be depending on the complexity of your project and your need for user information about the project.