Personas in Real Life

Master of Science Thesis in the Master Degree Programme, Interaction Design

JOSEF OTTOSSON
TIM BRANDIN

Department of Applied Information Technology
CHALMERS UNIVERSITY OF TECHNOLOGY
UNIVERSITY OF GOTHENBURG
Gothenburg, Sweden, 2012
Report No. 2012:073
ISSN: 1651-4769
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Examiner: OLOF TORGERSSON

Technical report no 2012:073
Department of Applied Information Technology
Chalmers University of Technology
University of Gothenburg
SE-412 96 Gothenburg
Sweden
Telephone: + 46 (0)31-772 1000

Cover:

Chalmers Reproserice
Gothenburg, Sweden 2012
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Abstract

Personas is a method for modeling users used for the interaction design in a software project. It has gained a lot of popularity within the industry. However, the role personas should play is not always obvious even to the practitioners. The method is also used together with other methods, which presumably have an impact on each other.

This thesis investigates how personas are interpreted within the context of Effect Management, a process used to improve the effectiveness when developing software solutions on an organizational level. The thesis suggests that in this context personas are appreciated as a communications medium, but not as much as a design tool. This is because Effect Management and personas overlap as design tools to the extent that workload of creating a design-worthy persona is difficult to motivate. It is also because personas and effect management have different perspectives on the user.

Keywords: Persona, design method, goal-directed design, effect mapping, effect management, interaction design, user-centered design
Contents

Abstract I

Contents III

Preface V

1 Introduction 1
  1.1 Background and Objective ........................................... 2
  1.2 Research Question .................................................. 2
  1.3 Limitations .......................................................... 2

2 Theory 3
  2.1 Goal Management ..................................................... 3
    2.1.1 Goal-Directed Design ........................................... 3
    2.1.2 Effect Management ............................................. 5
  2.2 Personas ............................................................ 9
    2.2.1 A Brief History of Personas .................................. 9
    2.2.2 Description .................................................... 10
    2.2.3 Benefits ........................................................ 11
    2.2.4 Pitfalls ........................................................ 11
    2.2.5 Ad Hoc and Provisional Personas .............................. 12
    2.2.6 Preparatory Work .............................................. 13
    2.2.7 Construction ................................................... 14
    2.2.8 Contents of a Persona ....................................... 17

3 Methodology 19
  3.1 Method Theory ...................................................... 19
    3.1.1 Observation ..................................................... 20
    3.1.2 Indirect Observation .......................................... 22
    3.1.3 Questionnaire ................................................. 23
    3.1.4 Interviewing ................................................... 23
    3.1.5 Focus Groups .................................................. 24
    3.1.6 Workshop ....................................................... 24
  3.2 Interviews .......................................................... 24
    3.2.1 Participants .................................................... 24
    3.2.2 Explorative versus Informative ............................... 25
    3.2.3 Context ........................................................ 25
    3.2.4 Mediating Object ............................................. 25
  3.3 Experiences of Effect Management and Personas .................. 26
  3.4 Critique on Methods Used ........................................ 27
Acknowledgements

We would like to say thanks to Thomas Porathe, our academic supervisor, for all the meetings, material, and valuable hints he has given us during our thesis work here in Gothenburg, Sweden.

As well we would like to say many thanks to Johan Berndtsson, our industry supervisor from inUse, for input and feedback on our material. And also Gustaf Carlberg for reading through the material, thank you for your thoughts and reflections.

Finally we would also like to thank all interviewed participants at inUse, Kodamera and Stendahl’s for their invaluable insights.

Gothenburg August 2012
Josef Ottosson & Tim Brandin
1 Introduction

Interactive products are becoming increasingly complex more and more infused in our daily lives. This creates an increased need for a well designed behaviour in such products. To address these issues designers and developers started talking about human-centered design and interface design in the early eighties. This included, among other things, finding good methods to further involve end-users in the design process and to understand the needs of the users for a product. These research areas eventually evolved into the term “interaction design”, which was first coined by Bill Moggridge and Bill Verplank in the mid-eighties (Cooper, Reimann & Cronin 2007).

Interaction design is concerned with designing digital artifacts. One thing that sets digital artifacts aside is that they exhibit behaviour. Thus interaction design is about designing behaviour. This sets the interaction design discipline apart from most other design disciplines since these are primarily focused on form (Cooper et al. 2007).

Saying that interaction design is only about designing behaviour might give a too narrow impression of what interaction design is. Moggridge lists five imperatives that an interaction designer should design for: usability, utility, satisfaction, communicative qualities and sociability. Cooper et al. describe interaction design as "inherently humanistic" and Gillian Crampton Smith, quoted by Moggridge, defines it in an interview like this:

“If I were to sum up interaction design in a sentence, I would say that it’s about shaping our everyday life through digital artifacts—for work, for play, and for entertainment.”

If interaction design is about designing for human beings, understanding human behaviour becomes critical. Anthropology, the academic study of human behaviour, has a lot of insight to offer.

Human behaviour can be explained as a socio-cultural system. A society defines roles, while a culture defines values that tell us how to act appropriately within those roles. Instinctively we interpret observable phenomena through our own cultural understanding. Getting to know a new culture requires time and dedication (Keesing & Strathern 1998). Thus, from this understanding of human socio-cultural behaviour, designing for other people is not as simple as designing for oneself. The designer must actively be engaged in getting to know the target users for the design.

Different methods exist that address the issue of conveying an understanding of the users to the design team. One method that has gained popularity in recent years is personas. The purpose of the persona method is to communicate the meaningful socio-cultural aspects of a user group to a design team. This is done by modeling the group into a user archetype. A persona has several advantages
over a real person. For example, a persona is always present and does not have goals that drastically avert from the group at large. While personas are advocated as a useful tool they require quality research and certain skills in order to succeed.

1.1 Background and Objective

Personas were popularized through Alan Cooper’s prominent book ‘The Inmates are Running the Asylum’. In Cooper et al.’s (2007) book ‘About Face’ personas are presented as part of the Goal-Directed Design process (see section 2.1.1), but have since been popularized and adopted into other processes.

In a pre-study for a software project related to the process of creating personas we observed that several interviewees incorporated Personas into an alternative process called Effect Management\(^1\) (see section 2.1.2). Engrafting personas into a new process seemed to have an impact on the role and the interpretation of what a persona is. The objective of this thesis is to investigate how personas work in practice within the context of the Effect Management process.

1.2 Research Question

This thesis poses the following questions:

- How does working with personas in real life situations compare to how it is suggested in literature?
- How does Effect Management impact the interpretation of and need for personas?
- Can Effect Management be of help in the persona creating process?

1.3 Limitations

The study will be carried out with companies within the vicinity of Gothenburg, Sweden for practical reasons. Focus will be on companies who work a lot with the web. The concept of personas is familiar within this area, and finding appropriate interviewees should be possible. Comparing interviews between people within the same field is hopefully easier than picking a more diverse group. There are also companies with connections to the Effect Mapping process within the web industry in Gothenburg.

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\(^1\)Our translation from the Swedish “Effektstyrning”

2 CHALMERS, Applied Information Technology, Master of Science Thesis 2012:073
2 Theory

2.1 Goal Management

Software design is a complex issue. Many projects fail to meet the expectations and requirements of both users and organisations, a fact which is well known both in academic circles (Sommerville 2007, Cooper et al. 2007, The Standish Group 1995) as well as in the mainstream media (Söderström 2010). Even though failed systems can often do what they need to do from a purely technical point of view they often fail to work in their context of use (Söderström 2010). This issue has given inspiration to invent not only new design methods, but new development processes. Within the area of Interaction Design a well-known process is *Goal-Directed Design*, a process developed and used at the company Cooper. Instead of being technology centered Goal-Directed Design is user centered and, as the name suggests, directed by the user goals (Cooper et al. 2007). However, Goal-Directed Design is not the only process of its kind. *Effect Management* is a user centered process developed and used at inUse Experience AB (inUse). While the two processes differ in many ways they both have *goals* as the center of attention. In this thesis this category of user centered processes will be referred to as *goal management*.

2.1.1 Goal-Directed Design

“The best way to successfully accommodate a variety of users is to design for *specific types of individuals with specific needs.*” (Cooper et al. 2007, p. 77)

In ‘About Face 3’ Cooper et al. (2007) present a method called Goal-Directed Design. The method makes the user the top priority. This means prioritising users over organisational goals. They reason that if the users can achieve their goals they will be satisfied, effective and happy, and as a result also buy the product. To achieve this goal Cooper et al. (2007) claim that it is not enough to know *what* the user wants to do, but also *why* they want to do it. The product should help the user reach his/her *goals*, not just perform a series of *tasks*. Tasks are just intermediate steps that a user performs to reach a goal and have no meaning per se.

The Goal-Directed Design process is divided into six phases which are based on the research presented in ‘The Role of the Artist-Designer’ by G. Crampton Smith and P. Tabor (1996):

- **Research** – Understanding the users and the domain. This includes getting to know the users, the domain, business goals and technical constraints.

- **Modeling** – In this phase the information gathered during the research phase is abstracted and modeled in various ways. Users, as well as other
groups of people, are modeled as personas and play a central role in the Goal-Directed Design process.

- **Requirements** – Through scenario-based design methods users are connected to other models, such as domain models. “The output of this process is a requirements definition that balances user, business, and technical requirements of the design to follow” (Cooper et al. 2007).

- **Framework Definition** – Based on the requirements an interaction framework and a visual framework is designed.

- **Refinement** – This phase is concerned with the details of the design and validating it, making sure that the design is in line with scenarios and personas.

- **Support** – Constraints typically change during the development phase. It is common that features have to be dropped to meet deadlines. It is important that the interaction designers are available here so that the design is not compromised.

The process as a whole is not particularly relevant in this study. The interesting parts are those that concern the creation and use of personas and the role the personas play in the design process.

In order to learn the goals of the user Cooper et al. (2007) advocate qualitative studies. This is because qualitative data is better than quantitative data at explaining behaviours of the users and the domain for the product. Cooper et al. (2007) write that “quantitative research can only answer questions about ‘how much’ or ‘how many’ along a few reductive axes. Qualitative research can tell you about what, how and why in rich detail that is reflective of the actual complexities of real human situations.”.

The data is processed and presented primarily in the form of personas. Personas are a big part of the Goal-Directed design method. Personas are models of user groups. The strength of using models instead of real users are that “good models emphasize the salient features of the structures and relationships they represent and de-emphasize the less significant details” (Cooper et al. 2007).

Each project should have one (and only one) primary persona *per interface* according to Cooper et al. (2007). This primary user is typically complemented with secondary personas. However, not only users are represented as personas in the Goal-Directed Design process. The customer can also be represented as personas, as can served personas (personas which are not users but directly affected by the product) and negative personas (users which are not targeted and whose goals do not have to be fulfilled). Customer personas are typically prioritized as secondary personas. The primary user is always the top priority (Cooper et al. 2007).
Although Goal-Directed Design incorporates many other modeling and design methods, the persona method plays a central role in the process. All goals—primarily those of the users, but also those from stakeholders and organisations—are represented as personified artifacts.

2.1.2 Effect Management

*Effect Management* is a method or process for managing the direction of an IT project in regards to its effects on the organization. It is presented in Ottersten & Balic’s (2004) book ‘Effektstyrning av IT’ and is practiced and promoted by the company inUse. The process assumes that the IT project is to serve a greater purpose than the goals of the individual user. The cornerstone of the method is the aphorism “The effects of IT emerge in the usage”. This means that the end user is critical. Even though the system is built to serve the organisation, it must also serve the end user. If it does not serve the user, the user cannot serve the organisation (Ottersten & Balic 2004).

Effect Management implies a process. It is important to note that Effect Management is not a project management method or a software development method. Rather it is a complement to any already existing process. The Effect Management should improve the existing processes already in place by offering greater precision.

Effect management has its foundation in the effects that one wants to emerge from the project. These effects could be methodologically researched and not be based on opinions. The process proposed by Ottersten & Balic achieve this by creating an *effect map* and doing a *target group analysis*.

**Effect Goals**

*Effect goals* express the positive values which are expected to be fulfilled with the specific product that is being designed and developed. The effect goals can only be achieved through actual usage by the intended users of the system (Ottersten & Balic 2004).

**Effect Map**

The *effect map* describes the hypothesis of how the desired *effect goals* shall be realised, by accommodating users needs and expectations (Ottersten & Balic 2004, p. 47). The effect map is a method and presentation form used, promoted and invented by the company inUse.

“The effect map is a structured method to create discussion and achieve consensus about the desired effects, and how they reasonably can come to be fulfilled.” (Ottersten & Balic 2004, p. 47, own translation).

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2*“Effektkarta”* in Swedish (Ottersten & Balic 2004)
The effect map should answer the following questions (Ottersten & Balic 2004):

- **Why** should one build the product—what is the overall purpose of the project investment?
- **Who** are the ones that will achieve the desired effects for the product, i.e. the target groups (see page 8)?
- **What** is it that the target-groups want and need; what are the *usage goals*.
- **How** should the product and the business be designed? What actions are needed to meet the target groups’ needs and desires?

The unique thing with this form of presenting the purpose, the target goals and the solutions is the connections that binds them all together (see figure 2.1). These connections create an overview which would otherwise be difficult to grasp. If a specific action does not have a clear effect on the desired effect goals, it should not be in the effect map (Ottersten & Balic 2004).

![Figure 2.1: An example on how the business goal, users, usage goals and features and activities all connect in an effect map to describe the desired effect goals. From ‘Effect management the guiding light in every design’ by Angner (2009). Reprinted with permission.](image)

The structure of an effect map is typically similar to a mindmap. The general purpose of the investment is placed in the centre of the map. Business goals (and sometimes also their measure points) are noted beneath this purpose (Ottersten & Balic 2004). Figure 2.2 illustrates how one places the purpose, target groups, user goals and features and activities in the map. When the characteristics of the target groups have emerged, the target groups are commonly placed in clockwise order.
around the purpose in order of importance. User goals, as well as their respective features and activities, are also prioritized. The most important goals go at the top of each list (personal communication with I. Domingues & J. Berndtsson, March 2012).

![Handwritten mockup illustrating the structure of an effect map.](image)

**Figure 2.2:** A hand written mockup illustrating the structure of an effect map.

Target groups in the effect map can be presented only with a symbol and a name, or with more detail and description. In most cases user actions start with an adjective describing the nature and importance of the action. The following three formulations are commonly used in an effect map:

- “Needs to identify…”
- “Shall be able to…”
- “Wants to read about…”

A *shall* generally describes something the user group has to do or has to have. A *want* is something they have a desire for doing or having. A *need* is typically something the purpose or business goals require a user group to fulfill, but the user has no personal benefit or desire of doing so (personal communication with I. Domingues & J. Berndtsson, March 2012).

**Measuring Points**

A complete effect map contains *measuring points*[^3] which make it possible to measure how well the project is able to achieve the desired effect goals. Measuring points describe how to measure that the purpose and the target goal are reached. Measuring points should only be defined for those effect goals that are the most important, due to the high cost in measuring them. The *purpose* should have at least as many measuring points as the amount of parameters it describes. A measuring point is built up out of three pieces (Ottersten & Balic 2004, p. 49–50):

[^3]: “Mätpunkter” in Swedish (Ottersten & Balic 2004)
• A suitable parameter which is of relevance to the purpose. For example: “The number of new clients”.

• A numerical value\(^4\) to make it measurable. For example: “x number of new clients in y months”.

• A course of action on how to measure. For example what tool should be used or what needs to be done to measure this point.

Ideally the measuring points are formulated to make it possible to measure and evaluate them both during and after both the design process and the development process (Ottersten & Balic 2004, p. 50).

Roles

Ottersten & Balic (2004) also write about the importance of having responsibility roles in the projects. Two roles are needed. The first is the effect manager who is responsible for reaching the effect goals. The other is the product leader who is responsible for the product’s formation as well as leading towards the effect goals.

Target Group Analysis

Doing a target group analysis\(^5\) is always part of the process of creating an effect map. It includes a study of how tasks are performed, as well as identifying groups of users with use patterns\(^6\) they have in common. Ottersten & Balic (2004) describe use patterns as what tasks one solves with the product, what experience and expectations they have towards the product.

The target groups can only in rare cases be identified by copying the organizations structure of roles, client segments or any other currently existing breakdown of users. This is because these already existing breakdowns are not anchored in the usage of the product from a behavioural point of view (Ottersten & Balic 2004).

When assessing user needs one should not blindly trust what users say they need. People do not manage to entail all details of how one does things. Furthermore, people are better at explaining known solutions to a problem than expressing their specific needs (Engelbrektsson 2004). To overcome this delusion and lack of detail one can combine both interviews and observational methods (see section 3.1.1). Many details are either silently understood or subconscious to the users, and can only be discovered by observing the user and posing control questions. Ottersten & Balic (2004) say that these soft understandings often give an edge and are crucial when creating a product with high usability quality. Ottersten & Balic (2004) suggest personas (see section 2.2) as a great method of

\(^4\)“Mättel” in Swedish (Ottersten & Balic 2004)

\(^5\)“Målgruppsanalys” in Swedish (Ottersten & Balic 2004).

\(^6\)“Användningsmönster” in Swedish (Ottersten & Balic 2004, p. 66).
presenting and documenting each target-group because personas make it easy for stakeholders and developers to understand the target groups and discuss them.

2.2 Personas

A design takes form through a process. The process guides the designer through phases with the goal of reaching a good design at the end of the process. This process should include getting to know the user and the usage of the product and then using this information to create a good design. Conveying the things learned in the research phase to the synthesis phase can be a problem, especially if different people are involved in the different phases. One method for conveying what was learned during the research, which has become very popular in recent years, is called personas (Cooper et al. 2007, Moggridge 2007).

2.2.1 A Brief History of Personas

Personas may be a relatively new method but there are forerunners to it that have been around for a few decades. As early back as the sixties the idea of defining markets came around within the field of product marketing and business strategy. This helped introduce the concept of user representations to the business world. This method has a back-to-front approach compared to personas; customers were identified based on the market instead of vice versa. Within marketing and business strategy this form of user representations evolved with deeper descriptions of individuals instead of cold hard facts about the demographic users population. For example, Upshaw promoted in 1995 the use of continuous visualizations of the individuals to inspire decision making with the personal perspective in mind. Within the branch of usability, which came around in the mid eighties, there have been usage of scenarios for a long time. However, scenarios tend not to focus on the user, but the full network of inter-cooperating actions and reactions of a system. It was not until later that the concept of the “actor” in the scenarios came into light. There are also user profiles, which arose from the need to analyze information from qualitative data collections (interviews, site visits etc.). These all meshed together in the form of user roles and user archetypes to supplement the scenario-based design processes. The first to call a user representation a persona was Cooper in his book ‘The Inmates Are Running the Asylum’ (1999). The new thing with the persona was the importance of embracing empathy. The ability for the reader to empathize with the persona is meant to improve the understanding for the user, helping the

Figure 2.3: A persona should feel real and invoke empathy (Cooper et al. 2007). From www.openclipart.org. Reprinted with permission.
designer to design a better solution for this particular user archetype. This is done by providing human traits to the persona, for example a human face (see figure ??) (Adlin & Pruitt 2006).

In Scandinavia there was a parallel movement called participatory design. It involved designing “use” together with users (Ehn 2008). In practice this means bringing users into the development process by having single users close at hand. One of the biggest critiques to this is that, while it is possible to pick a user from the identified user group, the chosen user will not be representable for that group on all accounts (Cooper et al. 2007). Personal needs and preferences could come in the way, things that could take the product in the wrong direction in relation to the user group as a whole. Personas work around this issue by offering a model of the user group. A model can smooth out differences between users, highlight the issues that are important and de-emphasize irrelevant issues (Cooper et al. 2007).

2.2.2 Description

Adlin & Pruitt describe personas as “fictitious, specific, concrete representations of target users” which “put a face on the user—a memorable, engaging, and actionable image that serves as a design target. They convey information about users to your product team in ways that other artifacts cannot” (Adlin & Pruitt 2010).

Personas are represented as individual persons. They should not be actual people but synthesized from real ones. This is appropriate because they will then engage empathy and direct the design and development towards the human target of the design (Cooper et al. 2007, p. 81). Personas are developed to help anyone within the team or organization becoming more user aware and user focused. Adlin & Pruitt (2010, p. 37) cite D. A. Norman’s reflection on personas: “Personas are tools for focus and aids to communication, and for this they only need to be realistic, not real and not necessarily even accurate (as long as they are appropriate characterizations of the user base).”. However, Norman also adds a word of warning regarding the personas human traits: “Although it is often fun to read the detailed descriptions of personas and to pry into their private and social lives, I have never understood how these personal details actually aid in the design process itself. They seem completely superfluous.”.

With a shared language and common artifacts, personas can help in building a consensus between all the part-takers in a project. Cooper et al. (2007) write that “it’s easier to understand the many nuances of user behavior through the narrative structures that personas employ”, and “because personas resemble real people, they’re easier to relate to than feature lists and flowcharts”.

Finally a persona does not only serve as a design tool. They can be a great asset as representation of a company’s or product’s user base. Thus, if well done it is possible to use the work put into each persona in other departments of a company, for example as a basis for the market research and sales plans (Adlin & Pruitt 2010, p. 85).
Identifying user groups is an important step in designing a successful product. A persona should represent a group of specific users identified having a common usage pattern (or distinct set of behavior patterns). Personas also need to be context specific to be effective. They should be focused solely around a specific product (Cooper et al. 2007, p. 82). A persona can also represent non-users as sometimes the one purchasing a product is not the actual user of the product, therefore these personas’ needs and goals are also important to consider when developing the product (Cooper et al. 2007, p. 84).

Personas should help designers and developers determine what a product should do and how it should behave. They can also create a common language between stakeholders and designers, keeping design centered on users at every step in the process.

### 2.2.3 Benefits

Personas have many good aspects related to them. They are especially good at shifting the focus towards a less unspecific trade of users, who are not necessarily like the designer. This helps the designer make better decisions (Adlin & Pruitt 2010). Personas also seek to find a common language and understanding between all involved parties in a project; a good persona can compel each individual into building a relational connection between them and the fictitious character. This has the purpose of engaging teams into finding better solutions customized for their archetype users (Adlin & Pruitt 2010). Adlin & Pruitt (2010) say that “personas can help improve the process; for example, personas can help your teams communicate more effectively, agree on and document design decisions, or achieve resolution on key issues faster”.

Advocates of personas claim that the method provides them with a precise way of thinking and communicating about how users behave, think and what they wish to accomplish, as well as why (Cooper et al. 2007, p. 75).

### 2.2.4 Pitfalls

It is impossible to satisfy all users. Products that try to do so often end up pleasing no-one (Cooper et al. 2007). Cooper et al. also claim that personas can help solve three common design issues during product development. The first is a problem called “the elastic user”, a situation where the term “user” conveniently bends and stretches to fit the opinions and presuppositions of whoever is talking.

![Figure 2.4: Personas avoid certain pitfalls.](image)
Cooper et al. (2007, p. 79). The second issue is described as when a designer or developer project their own goals, motivations, skills and mental models onto a product’s design. It is called “self-referential design” by Cooper et al. (2007). Sadly the typical mental model of the end-user in this case seldom extends beyond people like the designer or developer. This can be perfectly fine for a narrow set of products but it will seldom satisfy the real end users who actually have to use the product or service. The last issue is called “edge cases”, the situation when a programmer or designer starts designing or programming for very specific cases which in reality the end user will very seldom head in to. All these problems arise because there is a lack of direction, which leads the project down the wrong road (see figure ??). Cooper et al. (2007, p. 80) suggest that by using personas the programmer and designer can in all these issues get a reality check and put the focus on the functionality which actually serves a purpose.

Personas must be based on research; real-world observation such as ethnographic studies, interviews and observation. The quality of this data will directly impact the effectiveness of personas in clarifying and directing the design activities (Cooper et al. 2007, p. 81).

Adlin & Pruitt mention a few things to keep in mind when working with personas. First off, being user centered is not natural to human beings, “we have a natural tendency to be self-centered” (Adlin & Pruitt 2006). Personas help us move away from our self-centeredness but this does not happen without effort. Secondly, users are complex, and “it takes great effort into understanding their needs, desires, preferences, and behaviors” (Adlin & Pruitt 2006). Thus creating personas requires skill and effort. Furthermore, pleasing some users might necessarily conflict with the interests of other users. Finally Adlin & Pruitt explain that the people doing the background research for the personas are not typically in the team designing the end product. This makes the important information about the user unavailable when it is needed, forcing the design team to forge ahead designing the least costly, easiest or most likely solution.

2.2.5 Ad Hoc and Provisional Personas

Both Cooper et al. (2007) and Adlin & Pruitt (2006, 2010) mention ways of developing quick and dirty personas when there is a shortage of time in a project. They use different names for these types of personas. Cooper et al. call them “provisional personas” and Adlin & Pruitt use the term “ad hoc personas”.

Cooper et al. (2007) describe provisional personas as an option when there is simply not enough time, resources or corporate understanding to perform the neccessary fieldwork. A provisional persona is based on existing material and knowledge within the corporation about the product’s market segments. While provisional personas may help focus the design they are also associated with certain risks. If one does not have data to back up a hypothesis one might focus on the wrong design target. One might also miss key features that could differentiate, or
worse, discredit the value of personas in the organization, resulting in rejection of the method for the long term (Cooper et al. 2007, p. 86–87).

If working as a consultant Adlin & Pruitt (2006) recommend “working with people as high up in the food chain as possible” and suggest to “rely heavily on the ad hoc persona process”. This way Adlin & Pruitt argue that personas will get supported from the top down. Afterwards it is possible (although not always necessary) to move on to create full personas based on more extended data analysis.

If no beforehand access of the executives are at hand—for example when working in a large corporation—it is worthwhile to use a substantial amount of data to back up all hypotheses made about the users (Adlin & Pruitt 2010, p. 21).

2.2.6 Preparatory Work

Cooper et al. (2007) emphasizes the importance of running extensive research and to find real factual data about users before creating the persona. If this is not done one risks basing the persona on assumptions and biases of a stereotypical person. Stereotypes may seem similar to the users but in most cases they are not the same. One particular aspect of the persona that is particularly sensitive in this respect is demographics, which often contain biases. One should choose wisely and with care when including demographics (Cooper et al. 2007, p. 83).

Adlin & Pruitt say that it is of great essence to research the employing organisation before creating any personas. A four step procedure is suggested, as well as first making sure that personas is the right method for the organization to employ (Adlin & Pruitt 2010, p. 12–16):

1. Personas mean hard work and cannot be created single-handedly. Therefore a team must be created with at least two and maximum ten members. People with prior knowledge of the market and users of the product is a good starting point.

2. Explore organisational aims (goals) to help build buy-in within the organisation, and later keep the team on track (for example, when team members ask: “why are we doing this again?”). Find at least five aims for each of the following categories: business goals, brand goals, user experience goals and differentiators. It is relevant that these aims are specific enough to help measure Return On Investment (ROI) later. For example, “increase traffic to our website” as a business goal is to unspecific. It would easily be improved with some numbers to make it measurable.

3. A plan on what to expect from the work creating the personas and what to deliver in the end is decided and agreed upon by the team.

4. The best result can be achieved with intelligence from a variety of sources, mixing both qualitative and quantitative data. Existing sources might already be available for the team from internal market research or via external
sources. Qualitative research with a few carefully chosen participants can fill in gaps in existing data.

Market segments should not be confused with personas as they focus on the sales process instead of the development and design of the product. However, they can still fill a purpose as an initial filter on whom to interview to discover the actual user-based personas (Cooper et al. 2007, p. 86).

If it is not possible to create the personas in close collaboration with the executives it is important to be able to back up the personas with data. Backed up with good research it is easier to convince people of higher authority that the personas are legitimate and useful tools that reflect the users the organization is targeting (Adlin & Pruitt 2010).

2.2.7 Construction

Personas are derived from observed patterns in interviews and from observations of real users. The goal is to construct a set of personas that represent the diversity of motivations, behaviors, mental models etc. observed during the field studies (Cooper et al. 2007). Cooper et al. (2007, p. 98–104) present a seven step approach for this task:

1. After the research has been completed, distinct behavioral variables can be identified (see figure 2.5). It is important not to focus too much on demographical data (such as age or location), as they are less helpful in defining useful user archetypes. Instead look into what activities, attitudes, aptitudes, motivations and skills that are distinct in your data.

2. Secondly, map each interviewee to each behavioral variable. It is not of essence with precise measurements, especially since it is often difficult to make good measure on these variables. The desired outcome is clusters of subjects to each significant variable (see figure 2.6), which will be useful in the next step.

Figure 2.5: Example of distinct behavioral variables
3. Step three involves discovering these previously mentioned clusters and looking for patterns in multiples of variables. An indicator for a good behavioural pattern is to find in between six to eight variables clustered together. These sets later form the basis of each persona. Usually between two to three patterns can be identified. For a pattern to be valid there must be a logical connection between the variables.

4. Synthetisation of patterns into bullet lists of character features, and descriptions of a typical personality will help bring the persona to life. One detail of great importance is the first and last name of a persona. The name must tell what type of persona it is and be distinct among the other personas. From each pattern analysis distinct and related goals that lead to discovered behaviors is noted and written down.

5. Checks for completeness and information gaps in each persona is done. If needed, personas of political importance to the stakeholders’ perception and assumptions are created just for their satisfaction. Redundant personas are removed or otherwise tweaked by giving them more distinct characteristics, thereby differentiating them from the other personas. The result of this step is a sufficient representation of the diversity of behaviors and needs. This will lead to reduced work when designing interactions.

6. Expand descriptions and attributes of the persona with more detail. This is typically written from a third person perspective, which will help users of the persona to latch onto what is conveyed. Details in the description do not go into deeper detail than what research can back up. The narrative should be written so that data which is otherwise only implied comes forth. Photographs are chosen with great care to best fit the demographics, hint the environment and capture the general attitude of the persona. Avoid “fluffy” elaborations and theatre details which ultimately reduce the usability of the persona.
Personas are prioritized to determine the primary design target. Complex projects, such as enterprise products, are allowed to have several primary personas.

“Focus the design of each interface to a single primary persona” (Cooper et al. 2007, p. 105)

Each primary persona owns an interface which can fully satisfy its respective persona. Suggested work-flow is to design for the primary and adjust to accommodate a secondary, but only if the secondary is not conflicting with the primary persona. If no primary persona can be identified (by comparing their goals against each other) the scope of the product is probably too wide and should be narrowed down.

In comparison to Cooper et al., Adlin & Pruitt’s (2010) propose a six step process. Rough persona skeletons are generated first and are later filled with more substance after prioritizing them (Adlin & Pruitt 2010, p. 21–22).

1. By close collaboration with stakeholders, quickly made personas (also mentioned as ad hoc personas) are drafted out of assumptions and current user conception within the organization. This lays the ground work to building a good top-down support within the organization. Creating these rough personas together with the stakeholders should make it apparent to the stakeholders that there are a lot of assumptions regarding the users. This should help motivate further and deeper research since they will see the need for communicating a unified understanding of the users throughout the entire organisation (Adlin & Pruitt 2010, p. 26):

2. Out of existing material, relevant information is extracted to discover relationships and thematics related to users and product domain, within the scope of the persona-project. A collaborative data assimilation activity is suggested by Adlin & Pruitt. A side benefit of engaging in an assimilation activity (such as affinity diagrams) is that all of those participating will come out with a common understanding of existing themes and relations in the large set of data used.

3. Rough skeletons are crafted, typically with bulleted lists with distinctive attributes and features discovered in the existing data and interviews. It is of essence they are kept brief and easy to tell apart within the subcategories of users. There are two ways of doing this step: either create an ad hoc persona skeleton (described more in detail in section 2.2.5), or create a data-driven skeleton. The difference is what underlying data will base these skeletons, namely from assumptions out of interviews from stakeholders, or data from quantitative and qualitative research in step two (described previously).
4. By prioritising them by the help of stakeholders, the importance of product and business strategy will help. The task is to narrow down the number of skeleton personas which later will be developed into full data driven personas. Adlin & Pruitt (2010, p. 53) describe pitfalls and helpful tips which can help in this exercise, such as prioritizing on frequency of use, size of market, historic or potential revenue or strategic importance instead of getting stuck on plain “perceived importance”.

5. Add substance and detail to the skeletons by adding data and concrete (but individualized) facts. Heighten with storytelling to append personality and context. For more details on what this could mean, see section 2.2.8. The goal is to overcome stereotypes by digging down to the users’ feelings and raising empathy (an idea that was first mentioned by Nielsen (2003)).

6. As a last step Adlin & Pruitt (2010) recommend to double check and validate the data in the personas so they still reflect the given data. The best sign to know when the persona is done and passed this step is when the amounts of adjustments to the personas goes down while the data is being validated.

2.2.8 Contents of a Persona

It is important that adding supporting fictional data only play a small role in persona creation. It should only be used as a narrative tool to help the persona come to life in the minds of the designers and the product team. It is useless to let more details into the persona than necessary as they most often are stereotypical data from the creator of the persona (Cooper et al. 2007, p. 86).

A persona made the Cooper et al. way is meant to be used as a design tool. Therefore it is important that the persona contains goals, as goals are the drivers and motivators behind these personas described behavior. Their goals explain why and how a persona desires to use a particular product or service (Cooper et al. 2007, p. 88). And personas must have motivations, much as any human has motivations for doing tasks. Motivations will give an understanding for designers and developers why a user performs a certain task (Cooper et al. 2007, p. 83–84).

Based on Norman’s (2005) view of cognitive processing (visceral, behavioral and reflective) Cooper et al. developed three categories for expressing goals presented below. These are essential to include in a persona according to Cooper et al. (2007):

- **Experience goals** – these goals are expectations on a product or service that are immediately perceptible with only the senses (the visceral). It is not about the aesthetics (“beauty”) of the design as a goal. It is about the perceived experiences, such as ease of use, simplicity to learn or simply the feel users expect they will receive from the product or service.
• **End goals** – The motivations to why a persona wants to do a specific task (the behavioral). This could be explained as what is expected to be the outcome of use with a specific product or service. “Behavioral design is all about feeling in control, which includes usability, understanding—but also the feel and heft” (Norman 2003). For example, when driving a high performance sports car “feeling that you are in complete control of the environment” (Norman 2003) is an end goal that the persona might want to achieve with the product.

• **Life goals** – To build a product relationship (the reflective), the “personal aspirations of the user that typically go beyond the context of the product being designed.” (Cooper et al. 2007, p. 93). An example of a product that has built a long-term relationship with its users is the iPod, which has an iconic meaning to the user. One can say it gives the user a “wanted” self-image attribute (Cooper et al. 2007).

Adlin & Pruitt’s (2010) most typical type of content in a persona is briefly presented here: To make the persona data-driven, making sure details can be traced back to interviews or data is a wise suggestion by Adlin & Pruitt, which is something not always within time scope or of any importance to the people using them.

• The persona must have a name. This name is usually in the style of an alliterative, a descriptive name such as “Michael Muscle” or “Rebecca Research”. The reason for an alliterative is that it helps remember the persona; it becomes a mnemonic device (Adlin & Pruitt 2010). Another advice from Adlin & Pruitt is to avoid from using names of co-workers or any famous people, as well as ones that strike as being negative in most cases.

• The choice of picture is an extremely influential one as it has a huge effect on how the persona will be perceived (Adlin & Pruitt 2010). The suggestion is to locate friends of friends instead of stock photos as stock photos might show up on billboards or in commercials, or perhaps in other project’s personas. The persona picture needs to be unique. As an alternative to real pictures sketches are more controllable to how they feel and what they do in the illustration. But sketches can feel far less real and therefore loose traction in some cases.

• An identifying quote, which presents the persona in a quick way with needs and key goals. For example “I want full control of both content and presentation” is statement used in a persona from the parallel project the authors of this thesis made at the time, see more on this under section 3 and section 4.

• A description, usually one to three paragraphs containing a narrative telling who the persona is and fills it with more meat on the bones. Also one of the factor to why a persona comes to life.
• Questions the persona would have in relation to the product the persona is being made for.

More detailed on what to include in a persona as an inspiration and more can be found in Adlin & Pruitt’s (2010, p. 58–29) useful list of persona characteristics, which in turn Adlin & Pruitt has evolved from Kuniavsky (2003).

The question is now how personas compare to reality. After some years of knowledge of personas within the field of interaction design the method should be well rooted. Have personas become the starting point for all projects, and do they work as they are described? These are all questions we are trying to uncover in this report. In the next section we present how we preceded with our questions in the topic.

3 Methodology

The primary method on which this thesis is based on is interviews with various interaction designers. These interviews provide the material which we then relate to literature on the persona method and to effect management.

The interviews conducted were also used as a pre-study for an IT project. The goal of the project was to create a tool that could be used when creating personas. Knowing how users worked with and thought about personas was therefore of paramount interest for the sake of the IT project. This gave the opportunity to use personas and effect management practically and get a first-hand understanding of them.

3.1 Method Theory

This section presents possible alternative methods for this study. There are numerous methods that can be used for studying the behaviour of people. Choosing a method is always a compromise between the expected usefulness of the outcome and the practical cost of performing the method.

Moggridge (2007, p. 664) divides research methods across two axes: statistical versus interpretive and saying versus doing, giving an example method for each category as seen in table 3.1.

• Statistical methods provide quantifiable and measurable results. Such data is useful in several situations. For example, statistics can tell which of two issue affects the most people and can thus be used to decide which issues to prioritize. Quantified data can also be useful when calculating the cost and expected return on investment.

• Interpretive methods typically have a more exploratory nature. This is useful when getting to know a problem domain. Interpretive methods do
not attempt to assert the general validity of statements and thus do not require the participation of the same amount of people.

- **“Saying”** methods give access to thoughts and values that are “hidden” inside the subject. These things cannot easily be accessed unless they are told. On the other hand, people might say what they want you to hear, and not what they actually think. This could be because they are concerned with how they are perceived, or because they want to make you happy. Furthermore, what people think they do might not be what they actually do. Thus the results can be tainted by conflicting motives.

- **“Doing”** methods can in some respects give a much more objective picture of a subject’s behaviour. In observing you can for example notice unconscious behaviour. However, the presence of an observer can of course influence the situation. Also, the interpretation of the situation is left to the observer. The observer of the situation must be familiar with the sociocultural context in order to interpret the situation correctly.

### 3.1.1 Observation

It is difficult to get a realistic story from only questionnaires and interviews. Therefore interaction designers do observational techniques to understand the true and often unsaid actions of their users. It is common for observation to serve as a secondary task when eliciting user behaviors and actions, as it is a great complement to interviews, entailing nuances and context otherwise difficult to discover (Sharp, Rogers & Preece 2007, Kuniavsky 2003). Observation can be done on both existing products and on future products. Depending on the background for the research appropriate observation techniques differs.
Think Aloud

Think aloud is a direct observation technique used most often in a controlled environment (such as a laboratory). According to Sharp et al. (2007) one of the many problems with observation is that the observer has difficulty understanding what is going on and how the user is thinking. Thinking aloud lets the user talk out each activity, and describing what he or she is thinking (Sharp et al. 2007, p. 335). The method can be used on existing systems as well as research on an existing activity in a context where the intended system is aimed for. A real benefit of Thinking aloud is when users conducting studies on existing systems suddenly stop talking out what they are doing and thinking. This gives a signal something in the system is difficult for them to understand.

Fly-on-the-wall

A method to extract behaviors in real context without disrupting any normal activity. One stands clear of anyone in the context being observed, without any interaction with anyone and recording all behaviors observed and anything useful going on (Moggridge 2007, p. 673).

Personal Inventory

Discovering what tools and artifacts people keep nearby and identify as being important to them can help understand activities and views (Moggridge 2007, p. 673).

Ethnography

Ethnography is not a method per se, neither is it only observation. Ethnography belongs to the social sciences and tries to reveal social organisation and culture. It offers a collection of methods. Ethnography primarily takes place in the field and it is done by someone unfamiliar with the “natural” way of doing activities (Sharp et al. 2007, p. 330).

The observer takes on the role of an insider, gathering data as it presents itself. By living with, together and in the role of someone in the group or environment studied. Captured data can take any form. For example, data can take the form of documents, sound recordings, notes, pictures or artifacts. Simply anything the observer can get his hands on (Sharp et al. 2007, p. 330).

In ethnography one does not always see interesting phenomena directly. Usually they are discovered afterwards while processing the gathered data. Ethnography studies can take from a week to several months. This often leads to a vast amount of collected data (Sharp et al. 2007, p. 330).
3.1.2 Indirect Observation

Indirect observation is methods conducted without users. Usually with artifacts from the field. The method works as a complement to regular data inquiries or substitutions when users are hard to reach or not available during the duration of the study. One has to work with what one can get and make the best out of the current situation (Sharp et al. 2007, p. 338).

Content Analysis

Neuendorf defined content analysis as “a research technique for making replicable and valid interferences from data to their content” (as cited in Ritchie, Burns & Palmer 2005). However, there is a risk of the researcher influencing the results of the method with their own biases during interpretation of each content artifact (Ritchie et al. 2005). In the book ‘Interaction Design’ Sharp et al. (2007) describe content analysis as a typical method of categorizing data and studying the frequency of category occurrences.

Artefactual Studies

Artifacts are important because they embody issues and ideas to social life. Thus studying artifacts can expose behaviours and say something about the context in which they were used (Thomas 1994).

Diaries

Keeping a diary of events is a method where participants are asked to write down their activities on a regular basis. It is advantageous considering it requires a small effort to get the study set up. No special equipment or expertise is needed, and it does not take up much resources during the study or to set it up. It is well suited for longer term studies, but only if the participants can cope remembering to writing everything down. Otherwise it would need more resources, such as a mechanism for remembering each participant on a certain time of a day. In longer term studies participants might also need an incentive. In addition to writing down participants activities one can boost diary posts with pictures, videos and audio (Sharp et al. 2007, p. 338–340)

Participational Design

Participatory design originates from the Scandinavia in the 1970s. It has a strong political connection and was part of the work democratization movement. The original standpoint was that people who were affected by a design should have a right to affect the design and should thus be part of the design process. A second reason is to maintain existing skills within the organization (Ehn 2008). To some
extent this stands in contrast to other methods mentioned here, where the designer learns about the users but the actual designing is done by a design expert without the direct involvement of the users.

### 3.1.3 Questionnaire

Questionnaires are excellent for gathering statistical data. Predetermined, quantifiable questions are preferable. Open-ended questions require a lot of work to process. It is particularly important that the questions are thought through and clearly worded since no researcher is present to answer questions in most cases. Questionnaires is often a resource efficient way of collecting data if the questions are known beforehand and if it is possible to motivate the respondents to answer (Sharp et al. 2007, p. 308–320).

### 3.1.4 Interviewing

Interviews are like an ordinary conversation. Kahn & Cannell (1957) refer to it as “conversation with a purpose” (as cited by Sharp et al. 2007). Sharp et al. describe there are four type of interview techniques: open-ended (or unstructured), structured, semi-structured and group interviews. When detailed and more specific questions are necessary for the interview, structured interviews and questionnaires are the recommended methods. They both contain a predefined closed set of answers for more specific detailed questions than questions in unstructured interviews (Sharp et al. 2007, p. 298).

#### Unstructured Interviews

The ‘unstructured’ part in an unstructured interview describes how much control the interviewer has over the interview process. Questions are posed in such a way that there is no straight answer (for example avoiding “yes or no” questions). The intention is to dig into a considerable depth on each topic so the interviewer can acquire an adequate insight about the matter. This type of interview is preferred when there is little or no knowledge of the alternative answers. The downside of an unstructured or open-ended interview is the time it takes to sift through the vast amount of data collected (Sharp et al. 2007, p. 298).

#### Structured Interviews

A structured interview consists of predetermined questions similar to those in a questionnaire. The approach is useful when specific questions can be identified, and respondents typically are in a hurry. Each question is created in such a way so they leave out anything open for interpretation, for example by forming them short and clear. To allow for statistical certainty each question needs to be asked the same way to each participant, to restrain the possibility for different interpretations by
respondents. Responses are typically chosen from a predetermined set of answers for each question (Sharp et al. 2007, p. 299).

**Semi-structured Interviews**

Semi-structured interviews are a mix between unstructured and structured interviews. A script is often used to make sure that the same topics are covered with each respondent, but the questions are open-ended and allow for further probing. This yields a qualitative result that is also comparable between respondents to some extent. (Sharp et al. 2007, p. 299–300)

**3.1.5 Focus Groups**

The focus group data collection method is a type of interview with multiple participants at the same time. Participants are picked to provide a representative sample of the target population. The idea is that in groups the ideas of individuals are different from those when conducting single subject interviews. The leader of the focus group is often a skilled and trained person. He or she will only ask simple questions and guide the discussions towards the topic of interest. The activity is often recorded and analysed for details afterwards (Sharp et al. 2007, p. 302).

**3.1.6 Workshop**

When comparing focus groups to workshops Sharp et al. say that “the workshops […] are very structured, and their contents and participants are all prescribed” (Sharp et al. 2007, p. 303). Workshops typically involve a practical activity, often (but not necessarily) leading to the creation of some kind of artifact. The purpose of a workshop is to boost creativity (Sherwin 2010).

**3.2 Interviews**

Interviews is the primary method used for this study. A total of seven professional Interaction Designers (although all did not carry this title) were interviewed about their view and experience of personas. Each interview started with an introduction where the respondents briefly explained the purpose of the interview, namely that it was for a master thesis project in cooperation with inUse. All interviews were documented through notes and audio recordings.

**3.2.1 Participants**

Selection of interviewees was geographically limited to the Gothenburg area for practical reasons. Requests were sent out to a number of companies that all deal with interaction design. Positive responses were received from three of the companies. Two of them see themselves as offering expertise within interaction
design while the third is more traditional web bureau, currently in the process of strengthening their in-house interaction design competence to offer a more all-
encompassing service in all of their projects clients.

Five of the seven respondents had experience with Effect Management through association with inUse. Of the two who did not one was familiar with Goal-
Directed Design. The two that did not have an association to Effect Mapping did not work for the same company, hence experience of Effect Mapping was present within all three companies.

3.2.2 Explorative versus Informative

The interviews were aimed to be explorative (to get to know our user group). A guideline was constructed. This was partly based on the results of interviews and conversations with the idea initiators. This also led to there being a slight confirmatory aspect, since it was necessary to either back up or refute assumptions and ideas brought forth by the idea initiators. While this made it necessary to cover certain question in the interviews, thus affecting the method slightly, it was of no greater interest from the perspective of this report.

While trying to make sure that the questions in the guideline were answered caution was also taken not to disturb the respondent. The premise behind this was that the respondent might give important answers to questions that were not asked in the guideline. Questions in the guideline were ticked off as they were touched upon, letting the interview take a natural course instead of enforcing a strict interview order. The questions from the guideline were used to carry the interview forward when the respondent was finished with his/her train of thought.

3.2.3 Context

The interviews were conducted at the workplace of each respective interviewee. An hour was reserved beforehand for each respondent. All interviews were held in conference rooms at the company of each respective respondent. No one but the interviewers and the single respondent were present during the interview. Conducting the user tests in a familiar milieu is advisable when conducting a study or investigation. This advise is primarily targeted towards situations where the subject is expected to act. An interview is presumably less dependant on a familiar context. However, comfort is also very important during an interview, making a familiar milieu a good choice.

3.2.4 Mediating Object

No stimuli were used during the interview. An example persona was kept in handy but not used. The interviews were mainly concerned with work procedures, the perception of personas and experiences. When covering these areas a sample
persona was not particularly helpful. Some respondents presented examples of their artifacts (e.g. Effect Maps and personas).

### 3.3 Experiences of Effect Management and Personas

By combining this study with a practical project we got the chance to experience both Effect Management and personas first-hand. This helped us get a deeper understanding of the two methods. However, it should be mentioned that the personas were not “full” personas (see section 2.2 for a description of personas) but ad-hoc personas. We did not find our research complete enough or the scope of our project big enough to construct full personas.

At the initiation of the project effect goals were identified and formulated in cooperating with the project initiators. The effect goals were documented in an effect map. Once there was a mutual understanding of the purpose and direction of the project suitable respondents were found (i.e. interaction designers with a potential interest in using personas in their projects). The results from the interviews were boiled down to a set of target groups in the effect map with corresponding personas. To make comparisons easier the interview results were compiled into a matrix.

Several ways of defining the personas were considered. An early approach was to design personas by attitude towards the final product. This attitude was defined by attitude towards personas in general and work habits of the respondents. This approach focused a lot on the expected initial reaction to the final product. While this might have been slightly useful when designing the home page for the service it was realized that the personas were not particularly useful for designing the actual product, and that data to back up the personas would be somewhat lacking.

![Figure 3.1: An early sketch produced in the process of defining suitable personas.](image)

Dividing personas by role was not particularly useful since practically all of our users had the same role (i.e. interaction designers). This practically led to only two groups—Consumers and Producers—where the interaction designer was the producer and everyone (including the interaction designer) was a Consumer. In
the effect map we kept Consumer and Producer as two target groups, since they explained a number of requirements that related to the effect goals. For example, the Consumer “Needs to keep my company information secret”. This describes a very important aspect of the tool, but will be equally important for each persona.

The final personas have a one-to-one relation to target groups in the Effect Map and are based directly on behaviour rather than finding an attribute that is parallel to behaviour. The role need not say anything about behaviour, and is therefore not a suitable parameter to differentiate target groups by. Attitude required a lot of assumptions and said too little about the product. Demographic attributes do not need to be related to behaviour at all and were dismissed very early on. Identifying these behaviours was not as easy as identifying roles, for example. However, behaviour is what is interesting from an interaction design perspective. Once the personas began to emerge it was not hard to see that this approach had yielded the seemingly most usable results.

The final result was four personas. Each persona had a matching target group in the Effect Map.

The project for which the personas were intended was relatively small. The roles of interaction designers, interviewers and developers were all taken on by the same two individuals. Therefore there was no need to embed as much information in the personas as would be necessary in a full team. “Full” personas were therefore never created.

The Effect Map was used frequently in the beginning of the project. It was very useful for identifying and defining personas. It was also used, in combination with the personas, to create the interaction design. Relating the design proposals to the Effect Map made it easier to see not only if the goals of the target groups would be met, but also with the idea initiators or customers goals.

Once an interaction design was chosen the effect map has been used very little. Most of the decisions after implementation began have been made based on the personas. However, as has already been stated, the personas are reflection of the Effect Map to a great extent. Using both the personas and the Effect Map when making decisions has been seen as redundant, since they should typically lead to the same conclusions.

3.4 Critique on Methods Used

Our choice of method was limited by what contexts we had access to. Unfortunately there was no ongoing persona project that we could tap into. Thus it was not possible to use any method that required access to a genuine context which we could observe or participate in. The best we could do was to use the methods in a project of our own did give some insight into the methods.

A second factor was if we had to actively elicit data from from our own subjects or if we could do it passively, for example by studying already existing data or by using methods that did not involve any subjects. All methods that take place in a
natural context require access to the right place at the right time. Unfortunately this was not available to us during this study. Instead we chose to focus on interviews, since this let us tap into the experiences and ideas of our interview subjects.

More about the creation process of a persona could have been learned through a workshop. Finding out if our results are statistically representable with a quantitative study would have been very interesting. Because of time and resource constraints our study did not involve any of these.

The study started off as very exploratory. Our respondents’ use of effect management was discovered along the way and found to have a very significant impact on the results. If this had been known when the respondents were first chosen it would have been interesting to also interview a group of users who did not use effect management. This would have made it possible to compare the groups to each other.

A software development project took part and was carried out in parallel to this study. This offered the opportunity to experience both personas and Effect Mapping first-hand. This gave us a little deeper understanding of the methods we evaluate and discuss. It would have been an even better solution participating and observing in a project together with our target group, but this was unfortunately not available during the time scope of this project.

4 Results

The results of this study come primarily from interviews with people whose professional role put them in the position of being potentially interested in creating and using personas. Pseudonyms have been used in this report. The names are not chosen to be demographically representable for our respondents in any respect. The respondents were distributed over three companies and we interviewed at least two people from each company.

Colleagues Alex, Dilan and Gaby all described themselves as familiar with both effect management and personas. Their knowledge came primarily from real life experiences.

Billie and Chris worked at the same company but worked by rather different methods. Chris was inspired by Cooper’s Goal-Directed Design. Chris had introduced the concept in the organisation and personas had become a popular method, especially amongst the Art Directors. Billie used effect management, which too had gained some traction within the organisation, and created personas mostly for the benefit of others.

Francis had spent time actively learning effect management. Elis had worked in projects together with Francis where effect management had been used but had not participated in for example creating an effect map. Neither Francis or Elis had much to give for personas but had only worked with rather rudimentary ad
hoc personas.

4.1 Goal Management

Only one of the respondents, Chris, was familiar with Goal-Directed Design. All other respondents saw personas as a stand-alone method and not part of a greater context. Instead these subjects introduced personas into their already established design process, namely Effect Management.

4.1.1 Effect Management Experiences

Our personal experiences with effect management were overall positive. The literature gives as a good theoretical understanding of the process. When actually practicing the ideas and principles described help and tips from people at inUse have been very valuable. We got a lot of good advice on both overarching concepts and ideas as well as small tweaks (and some curious facts and details on top of that).

The Effect Map was very useful in the process of shaping the project. It was also a good way to communicate between us (the designers and developers) and the stakeholders. The map was used less during the actual project. Printing it and having it on paper would have given it a more natural place in the project, which is also the common practice within inUse.

4.2 Personas

In general terms the respondents saw personas primarily as a way of communicating and “humanizing” documentation about users. Using personas to reach a consensus between different parties of a project was appreciated and seen as a successful strategy. None of the respondents ever mentioned creating personas for anything else than user groups (for example no one mentioned creating a persona representing the initiator of the project see section 2.1.1). The personas were tightly linked to the Effect Map, the main artifact produced in the Effect Management process. This meant that among those respondents that used Effect Management the concept of primary and secondary personas was inappropriate.

4.2.1 Persona Adoption Within a Project

The respondents had rather different things to say about how and by whom the personas were used during the project. All agreed that personas were useful when dealing with the client but opinion on how useful they were for other project roles differed.

Getting stakeholders to adopt personas seemed to go rather effortlessly. For example, Francis and Elis had both seen little success with personas except for keeping focus during meetings with stakeholders. Experience with the method
came from their own attempts. Despite rather rudimentary ad hoc personas with little substance, sometimes lacking even an illustration of the persona, they were often adopted by the stakeholders and actively used during conversations. Thus personas had not gained much traction within the organisation other than when communicating with customers.

Billie described their organisation as rather mature when it came to working with personas and said the following about introducing personas in an organisation:

This is what I think, if one doesn’t know about personas, if say if a project group doesn’t know about personas, then it’s the interaction designer—he is the one with the knowledge—who will create them and distribute them and talk about them and use them. When it has become run in it is probably mostly the AD [Art Director] […] who uses them and talks about them to the extent that one discusses solutions.7 (Interview with Billie 2012)

In other words it took an effort to educate the organisation in how to use personas. Once personas was a familiar concept the same initial effort is no longer necessary.

Gaby had positive experience of working with personas that were handed over as deliverables from a pre-study. Both the delivering and the receiving side had an acceptance for the method.

In summary adoption of personas often requires overcoming a threshold. Using personas to communicate with the stakeholders did not require a lot of effort, but fully adopting personas into the design domain of the project required a much larger effort and was in most projects neither achieved or attempted.

4.2.2 Personas for Communication

All interview subjects appreciated personas as a communications medium. This was true for both those who embraced the persona concept and those who were more cautious. The primary target for this communication was the customer (i.e. the person or organization financing the project).

Many found personas useful as a definition, using the persona to reach a consensus with the customer.

“In this case I use them to get the customer to understand that what we’re doing we’re doing not for you or someone in your organisation but we’re doing it for these.”8 (Interview with Chris 2012)

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7 “Jag tror så här, om man inte känner till personer, om säg om en projektgrupp inte känner till personor, så är det interaktionsdesignern som kommer—det är ju han som har kunskap—som kommer att skapa dom och distribuera dom och prata om att vi ska använda dom. När det är inkört så är det nog mest AD […] som använder dom och pratar om dom i den mån att man bollar lösningar.”

8 “I det här fallet så använder jag dom för att få kunden att förstå att det vi gör det gör vi liksom inte för dig eller för någon i din organisation utan det gör vi för dom här.”
“It should be possible to […] point to it and understand and communicate around it and it should be so easy that one can say that ‘yes but this app that we’re building… shall we include this function? I don’t know, what do you think Frank has to say about it?’.”

(Interview with Billie 2012)

Billie saw the communication aspect as the core purpose of using personas:

“All in all I see personas as some form of tool for communication.”

(Interview with Billie 2012)

For personas to be usable for communication they first have to be accepted by the customer. Some respondents expressed this as shared ownership of the persona. It is important that the customer can identify with the personas and trust them. This process could be anything from smooth to rather rough.

“The best thing that can happen is when you visit a customer and they have put the personas on the walls and are talking about them.”

(Interview with Billie 2012)

No respondent mentioned a project where personas had been an outright failure. However, it seemed common that personas worked sub-optimally:

“But i think that often that, it is very seldom I think that I’ve been part of a project and people have an extra eye open for exactly how the persona is and can quote straight from the text, it simply almost never happens.”

(Interview with Dilan 2012)

4.2.3 Personas as a Design Tool

Alex summarised the purpose of personas as:

“To get a grip on which target groups that exist and what the usage looks like within that target group.”

(Interview with Alex 2012)
However, amongst most of the respondents, Alex included, there was a lot of scepticism towards using personas as a design tool.

“But it is one of those things where I think it becomes problematic, that they become too...too human almost, which is actually the purpose with personas so to say, to actually get a person that you design for, but I think there are limitations and problems with it, at least when one is to design based on it.”\(^\text{14}\) (Interview with Dilan 2012)

Most of the critique against personas was related either to the information they conveyed, or to the form in which they conveyed information. An example of the former are the following quotes from one of the respondents:

“But from a usability perspective my opinion is that there are a few issues. [...] I don’t know where to place the button even though I know that the user’s name is Lasse, is 45 years old and lives in Torslanda.”\(^\text{15}\) (Interview with Billie 2012)

In other words, a persona did not give enough detail to determine necessary, low-level design decisions. The same respondent did however find that using personas was helpful for more high-level decisions:

“In the use situation it doesn’t matter very much \textit{but} it can play a role [in] knowing which solution one should do.”\(^\text{16}\) (Interview with Billie 2012)

Some respondents expressed that they found personas to be an ineffective way to communicating information about the users. While they were not necessarily sceptical to personas as such, they found them ineffective when they needed to quickly get an understanding of a particular aspect of the persona. They found the free-flowing, narrative ineffective and fleshed out with too many trivia:

“There is also a lot of fluff in the persona, in my opinion.”\(^\text{17}\) (Interview with Gaby 2012)

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\(^{14}\)Men det är en sån där sak som jag tycker det finns en problematik i, att de blir för...för mänskliga nästan, och det är ju egentligen syftet med personor så att säga, att verkligen få en person man designar för, men jag tycker det finns begränsningar och problem i det, i alla fall om man ska designa utifrån det”

\(^{15}\)”Men ur ett användningsperspektiv kan jag tycka att det finns vissa problem. [...] Jag vet inte vart knappen ska sitta även fast jag vet att användaren heter Lasse är 45 och bor i Torslanda”

\(^{16}\)”I användningssituationen spelar det inte så jättstor stor roll \textit{men} det kan ha en roll [i] att veta vilken lösning man ska göra”

\(^{17}\)”Sen finns det välägit mycket fluff runtomkring också i personan, upplever jag.”
In summary most of our respondents were sceptical to the usefulness of personas when it came to interaction design. However, this attitude was not the only one:

“I have always been an advocate for personas, and the reason is that I know how to use them.”  

(Interview with Chris 2012)

Furthermore, the same respondents explained that:

“And so one must take into account things such as what they feel and what they experience and such, [...] it is only on a persona level that one can specify what they feel.”

(Interview with Chris 2012)

This understanding of the personas feelings gave a deeper insight which could impact the design so that it became more suited to the persona. This was the only of our seven respondents who so strongly pointed out the ability to empathize with the persona as a valuable asset when designing.

How useful personas were to the design seemed to depend a lot on the scope of the project:

“If it’s like in this case, a big design project where we work with the design for half a year, then we use them during the whole design phase”

(Interview with Chris 2012)

Another useful aspect of personas that was pointed out by another respondent was enabling other members of the project to do complementary design work:

“Everyone shall understand for whom this is for so that everyone can make their own small decisions on how to improve things.”

(Interview with Gaby 2012)

The strength here was not found in making better decisions as an interaction designer. Instead the use came from sharing the understanding for the interaction design with the rest of the team. That way each team member would be equipped with an understanding for the product, enabling each member to answer a lot of the small questions themselves.

18. "Jag har alltid varit en förespråkare av personas, och det är för att jag kan använda dom"
19. "Och då måste man ta med såna saker som liksom vad dom känner och vad dom upplever och sånt, [...] det är bara på personanivå som man kan speca vad dom känner."
20. "Är det som i det här fallet, ett stort designprojekt där vi jobbar med designen ett halvår, då använder vi dem under hela designfasen"
21. " Alla ska förstå vilka det här är till så att alla kan liksom fatta egna små beslut om hur saker ska bli bättre."
4.2.4 Persona Experiences

Everything from the pre-study to the implementation of the final design was done by ourselves. Since both had been present at all of the interviews we did not feel the need for full personas. Instead the ad hoc personas served as a consensus between us and the stakeholders, as well as a reminder of the interviews to ourselves.

The personas were used much more frequently than the Effect Map during the project. The personas displayed enough information from the effect map for us to be satisfied. In retrospect it would have been very easy to place the map along alongside the persona printouts on the wall. It’s not possible to say what different it would have made, but there is at least no reason to think that it would have had a negative impact on the project.

The narrative text was rather sparse and we used a lot of lists in our personas. This made a lot of sense to us since we already had a connection to the respondents, and could thus use the personas as a quick reference to confirm or refute design ideas.

While creating ad hoc personas was sufficient we had a hard time trusting the personas completely. At times we wondered to what extent they were merely products of our fantasies. It was very difficult to portray the photos on the persona posters as real people. It might have been a good idea to either improve the personas, or to exchange the photos with sketches to better reflect the ad hoc nature of the personas. An alternative strategy could have been to rely more on the Effect Map than on the personas.

5 Discussion

5.1 Goal Management

We have chosen to categorize Goal-Directed Design and Effect Management under the name Goal Management in this report. However, they have some major differences.

All our respondents thought well of using some kind of goal management method. All but one respondent used Effect Management (or a variation thereof) and one was inspired by Goal-Directed Design. The personas method was perceived to be of greater importance for the one respondent who used a Goal-Directed Design inspired method than to the respondents who tended to use Effect Management. This makes sense since personas is an integrated part of the Goal-Directed Design process, while it is not a core method of the Effect Management process.

Goal-Directed Design has a rather individualistic perspective. It makes the user the center and top priority of the project. In contrast, Effect Management focuses both on the organisation and the user. It has a more collective perspective since the individual is not greater than the collective. At the same time it recognises that the user might need to do things that the user doesn’t necessarily want to do,
i.e. it does not deny the individual or see the individual merely as a product of the collective. Instead it strives to strike a balance between the organisational, collective goals and the goals of the individuals within the collective so that they can co-exist in harmony. From this it seems logical that Goal-Directed Design would be suitable for projects that produce consumer products which are not designed to have a significant place within a larger system, while Effect Management is more suitable as soon as the interests go beyond those of the individual. This reflection is of course only based on theoretical sources—this report presents no empirical data to see if these theoretical speculations are parallel to practical execution of the processes.

One thing to notice is that the process behind creating the effect map is very similar to the ad hoc persona process Adlin & Pruitt (2010) suggest. Thus, following one process should more or less make the other obsolete. What differs is primarily from what perspective the findings are presented.

5.1.1 Lack of Scientific Credibility

Goal-Directed Design is developed by and based on experiences from the company Cooper. Thus it is not based on a foundation of scientific research. This reduces the credibility of the method. However, the method has gained traction and is thus relevant to discuss regardless of it’s foundation. The fact that the method has reached the acceptance can also add to it’s credibility.

Effect Management has much the same background as Goal-Directed Design; it is developed and used by the consultancy company inUse. It is best documented in the book ‘Effektstyrning av IT’ by Ottersten & Balic (2004) and in the Wiki book ‘Användbarhet i praktiken’ (Användbarhet i praktiken – Wikiboken 2012). The method does not have the same fame and widespread use as Cooper’s Goal-Directed Design.

5.2 Personas

The perception of what a persona was differed between the respondents. There were examples of respondents who used personas heartily (Interview with Chris 2012) and those who used it only occasionally (Interview with Francis 2012). There were also respondents with lots of experience of personas (Interview with Billie 2012) and those with little experience (Interview with Elis 2012). Together these rather diverse respondents offered a picture of how personas might work in real life projects, and how this compares to how personas “should” work.

5.2.1 Personas for Communication

Communication was an area of agreement within the group of respondents, but also between the respondents and the theory. Even those respondents most sceptical to the usefulness of personas could see the benefits of personas for communication.
Communication with the customer was the most appreciated. Motivating a design to a customer seemed to be a re-occurring issue in most projects, and personas provided a common ground where designer and customer could meet and discuss in a common language. This could explain why some respondents seem to adopt personas only half-way—they already have methods for designing, but not for communicating, so they use the communicative qualities of the persona but keep other methods as design tools.

However, using personas for communication does require some effort. The persona does not sell itself. None of the respondents told us of any downright failures, but they did mention incidents where personas have worked sub-optimally.

5.2.2 Personas as a Design Tool

In ‘About Face 3’ Cooper et al. (2007) present the persona as part of the Goal-Directed Design process. In this process the persona has a defined and central role to play. Only one of the respondents modeled his or her process after Goal-Directed Design. This seemed to have a great impact on how personas were used as a design tool. While all respondents found personas useful for communicating with the customer, not all found them useful as a design tool.

One reason why some respondents did not use personas as a design tool is that they had little experience of personas, and even less experience of good personas. The personas they had been in contact with were often not suitable for designing, either because they were not detailed enough or because they were not believable, or neither. With the help of more experienced interaction designers, or more time and resources to create personas, circumstances might very well be different.

However, lack of experience about personas does not fully explain why so many of the respondents did not prefer personas as a design tool. A common denominator for all sceptics was that they all used Effect Management. Personas did not have the same central role in these projects as prescribed in the theory. This impacts how they are used and prioritized. Personas becomes an add-on, a complement. In Cooper’s Goal-Directed Design, design decisions are based on the prioritized persona. This is based on the premise that if the user is happy, they will use the product. Business goals are secondary—they are represented by the customer personas. Effect Management takes a more overarching approach—design decisions are based on estimating the effect of fulfilling user goals (wants, needs and shalls).

On top of this there was also a critique of personas as being ineffective. Some respondents found personas to be less than optimal when one needed to know about a particular aspect of the persona. These respondents proposed various forms of data visualisations, like sliders of graphs, so that one could at a glance form an opinion about a particular aspect of a persona. Free-flowing texts were perceived as tedious to extract information from. Personas were also described as sometimes being “too human”. This critique stands in contrast to Cooper, who values strongly the personification because it engages the empathy of the designer.
As mentioned in section 2.2.7, Cooper et al. warn that “too much embellishment and theatre can run the risk of making personas seem a fluffy waste of time” (Cooper et al. 2007, p. 103) but mean that leaving out the narrative leaves much of the complex behaviours implied.

In most cases the respondents did not find personas to be credible enough to be useful design tools. This does not mean that personas as a method is insufficient. We believe that the personas lacked credibility because they were never designed to be design tools in the first place. The true design tool in these projects is the effect map. The personas were merely “humanized” versions of the target groups in the map, created to aid communication rather than design. Goals are described already in the effect map and using personas as a design tool becomes redundant. Generally the personss did not seem to contain anything of substance that was not already present in the map.

In the one organisation where personas were actively used as design tools it had taken some effort from the interaction designer in the beginning. Once the method was understood it became appreciated and was often used effortlessly. This agrees with the theory; both Cooper et al. (2007) and Adlin & Pruitt (2010) agree that the interaction designer needs to actively work on getting the personas accepted. It was interesting that Billie, who personally used the effect map rather than personas for designing, used personas as a way to hand over the results from the user studies. One of our respondents, Gaby, had experience of being on the receiving end, i.e. working on projects where the pre-study deliverable came in the form of a persona. Thus it seems that the threshold to make personas useful for design is rather high. With the presence of the effect map we are not sure that making the effort to overcome this threshold is necessary.

Cooper et al. (2007) talk about a whole array of personas, modeling any actor that has a significant impact on the product. The only type of personas ever mentioned by the respondents were user personas. This helps explain why a number of the respondents did not trust personas to give sufficient information to carry out a project. Adlin & Pruitt (2010) do not talk about any personas other than those modeling users. Instead they propose using personas to force stakeholders to clarify business goals early in the process. All of our respondents except for Chris used other methods (primarily the Effect Map) instead. Once again this means that typical persona tasks are delegated to other methods, thus trivializing the role of the persona.

A reflection coming from our experience with effect management and personas is that it is easier to insert premature design decisions into the effect map than into a personas. This is because actions are a part of the effect map, while they should not be a part of the persona. Thus a persona (when done correctly as described in section 2.2) separates the goals of the users from the design solutions.
5.2.3 Creating Personas

When using effect management personas were created from the target groups identified and defined in the effect map. The process of creating the effect map is very similar to the process suggested by Adlin & Pruitt (2010) for creating an ad hoc persona. Thus it would be redundant to repeat it once again. Since the only use for “personas” in this scenario is communication the target groups only need to be dressed up a few human attributes such as a name, a face and perhaps a quick summary of the personas most important characteristics.

In summary the process behind creating the effect map seems to give a structure for creating personas. At the same time the effect map makes the persona redundant as a design tool.

6 Conclusions

6.1 Personas in Real Life

Personas, as described in literature sources, is a method that is supposed to take a central and significant role in the design process. The results from our interviews suggest that it is common to adopt personas to only play a marginal role in the project. This changes the role of the persona significantly. However, we also found that this was not always unintentional—interviewees used adapted interpretations of personas to fill their specific needs, which were often different from the needs a “real” persona caters to.

6.2 Effect Management and the Impact on Personas

Effect management deals with design decisions. Amongst our respondents personas lend their communicative qualities to the process but their use as design tools are largely left out. The persona was typically used when discussing solutions with a customer, but the underlying effect map is the artifact used to base design decisions upon. Thus the persona might be described as a medium through which the effect map is communicated rather than as a design tool. It is primarily used for communication and rarely used for design.

6.3 Effect Management and the Persona Creating Process

As discussed, the process behind creating ad hoc personas (described in section 2.2) and the process behind creating target groups in the effect map (described in section 2.1.2) are rather similar. Most of the interviewees used the effect management process in their projects. The personas not only had a one-to-one relation to the target groups, but in most cases were created as an alternative or personified representation of the target groups. However, when using effect management the
interaction designers did not see the need for personas as a design tool. Thus effect management can be an aid for creating ad hoc personas but inhibit the creating of full personas, since full personas seem to become redundant in combination with an effect map.
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40  **CHALMERS, Applied Information Technology, Master of Science Thesis 2012:073**


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A Appendix

A.1 Interview guide

Frågor

- Hur definierar du en persona? (Mental bild)
  - Syfte
  - Innehåll
  - Egenskaper

- Är det något ni har använt frekvent på erat företag?
  - Varför/varför inte?
  - Hur använder ni det? (Hur)
  - Vilka på företaget använder det? (Roller)
  - När använder ni det? (När, i vilken fas av projektet)
  - Vad är bra?
  - Vad är dåligt?

- Hur tar ni fram personas?
  - Vilka verktyg använder du för att skapa personas?
  - I vilka former presenterar du dom i?
  - Hur delar ni med er av dem i gruppen?
  - Vem är det som skapar dom (de olika formaten) i gruppen?
  - Tycker du era personas är snygga som de är nu?
    * Vem gjorde dom snygga?
    * Hur lång tid tog att göra dom snygga, tills du blev nöjd alltså?

- Vad skulle du vilja få ut av ett verktyg för att hantera personas?

- Vad behövs för att kunna kommunicera med kunden och få en acceptans över personan?

- Vad behövs för att du ska kunna ta designbeslut baserade på personan?

- Hur mycket tid uppskattar du det tar att skapa personan?
A.2 Interview guide — helper questions

A set of questions to help spin off any interesting topics when touched upon by the interviewee.

Frågor

Bakgrund

- Vet du vad en persona är för något? (Förklara)
- Hur definierar du en persona? (Mental bild)
- Är det något ni har använder frekvent på erat företag?
- Varför/varför inte?
- Vad är bakgrunden till idén?
- Vilken situation triggade idén?
- Har ni haft den länge?
- Har ni försökt lösa problemet innan?
- Vad är dina intressen?
- Känner du dig allmänt stressad i din vardag?

Syfte/Mål

- Vad känner du att du kan få ut av ett verktyg för att hantera personas?
- Eller vet du någon som kan få ut någon nytta av personas?
- Vad är bra med personas?
- Varför använder du personas?
- Vilket/vilka syften ska uppfyllas? Finns det något mer som är bra med personas?
- Vad är dåligt?
- Hur ser affärsintresset ut?
- Hur viktigt är de två (eller flera) målen?
Användning

- Hur använder ni det? (Hur)
- Hur tar ni fram personas?
- Vilka program skapar ni dom i?
- Skapar ni dom bara i vissa filformat och storlekar?
- Hur presenterar ni dom?
- Hur delar ni med er av dom?
- Tycker ni era personas är snygga som de är nu?
- Vem gjorde dom snygga?
- Hur lång tid tog att göra dom snygga, tills du blev nöjd alltså?
- Vilka på företaget använder det? (Roller)
- När använder ni det? (När, i vilken fas av projektet)
- Hur mycket tid brukar ni planera för att jobba med personas?
- Och hur mycket tid brukar det faktiskt ta?
- Vad är svårt?
- Var stöter ni på problem?
- Några vanligt förekommande problem?
- Hur ofta använder ni dem?
- Fungerar dom som ett verktyg för er?
- Hur vill du jobba med personas?
- Vilka tror ni använder personas mer än ni själva?
- Vilka åldersgrupper använder personas?
- Vilket kön använder dem mest?
- Finns det kulturella skillnader i hur personas används?
- Finns det strukturella skillnader i hur personas uppfattas?
- Använder ni hostade tjänster eller är det ett krav att allt ska vara “in-house”?
Förväntningar

- Vad förväntar du att du kommer göra med ett verktyg för personas? (Förväntan)
- Vad vill du åstadkomma?
- Hur ska ett gränssnitt för personas bete sig?
- Vad för känsla ska den ge? (Försök gräva djupare för att få svar på detta)
- Vilka kommer att använda detta verktyg? (Målgruppsanalys)
- Vilka företag?
- Vad för kunskap har användarna?
- Erfarenheter, Uppgifter?
- Användningsfrekvens?
- Ålder, kön, etc?
- Kultur, Värderingar? Varför denna produkt?
- Vad vill målgruppen uppnå?
- Miljö?
- När och var vill du helst arbeta med personas?
- När du ska förbättra dem?
- När du ska dela med dig av dem?
- När du vill bli inspirerad?

Förhoppningar

- Vad hoppas du att du kan göra bättre med ett verktyg för personas? (Förhoppning)
- Vad önskar du ska gå bättre med personas?
- Vilka vill du ska använda detta verktyg?
- Vad för effekt önskar du uppnå med detta verktyg?
- Vad saknas med personas, vad hade du önskat varit bättre?
Övrigt

- Vad för tidningar brukar du läsa?
- Vilka typer av inlägg brukar du läsa?
- Vilken typ av media är detta?
- Papperstidning
- iPad magasin
- Internettidning
- Bloggar
- Vilka inlägg brukar du hoppa över?
- Var får du oftast inspiration?
- Vad får du inspiration av?
- När får du inspiration oftast?
- Vad gör du för att koppla av?