# Engaging Personas

| NUMBER OF PARTICIPANTS | FACILITATORS | CATEGORY | DURATION | LEVEL OF DIFFICULTY |
|---|---|---|---|---|
| Whole Project Team — Groups Of 2-4 | 1 for whole workshop, 1 Notetaker per Group | Empathize & Define Phase | Min. 1h | Moderate |

## Description

Like other persona methods, Engaging Personas are used to model the needs of different users and to support a project team to design user-centred. The idea of Engaging Personas is that personas are designed in a way that the members of a project team become more engaged with them. The more people engage with personas and perceive them as "real" the more likely they will consider them during a design process and want to serve them with the best product or service. Engaging Personas should help a project team to reflect reliable and realistic if users use a product or service in an expected or desired way. Team members should be able to imagine the created personas in future use situations and thus refer more to the user's needs, which helps to avoid the development of unnecessary products or features.

To reach these goals Engaging Personas should be based on well researched data. Besides the characterization of personas like in other persona methods, the focus of Engaging Personas is on the creation of stories that bring personas to life. Stories should represent vivid descriptions of the activities of users when dealing with the product or service. Probable or even real stories make it easier to identify with the personas throughout the design process and to focus on their needs. Compared to other persona methods Engaging Personas are more specific, elaborated and further developed. Engaging Personas should therefore have an advantage over other methods where personas are easily forgotten or play a minor role in the design process once created. The usage of methods where instincts and experiences of the project team members potentially play a greater role during a design process can lead to unreliable, biased or highly speculative personas and products or services that are influenced by prejudged or predetermined user needs. Using real data to create personas decreases the risk of stereotypical descriptions and makes them more objective. Furthermore, personas that are based on real data can make it easier to justify design decisions and to find arguments against imaginary ideas about user profiles during the further design process. However, gathering data can be expensive and the preparation of a workshop to develop Engaging Personas and the workshop itself are likely to be more time consuming. In addition to that, further knowledge is necessary to conduct research and analyse data properly. In the end, the costs and benefits of this method should always be evaluated and compared to other methods, like similar persona methods.

## Materials

- ▸ Template printed out as poster

- ▸ Pens & Markers in different colours

- ▸ Flipchart or Whiteboard or Pinboard

- ▸ Post-Its and tape or pins

- ▸ Cut out pictures, logos etc

- ▸ Alternatively digital tool like Miro


## Preparation

**Data Gathering**

Collect real user data by combining qualitative and quantitative approaches. If possible, try to start thinking qualitatively by gaining first insights by conducting observations, interviews, focus groups, etc. Secondly use quantitative methods, like surveys, to gather more data and verify your findings.

Collect as much knowledge about users as possible and maybe even try to do user research of actual users of your target group. Use questions that are relevant for the project and try to gather demographic data as well. To create Engaging Personas you should focus mainly on patterns in attitude and behaviour. Example questions:

- ▸ What skills are required to do your job?

- ▸ How do you define success?

- ▸ What issues keep you up at night?

- ▸ Walk me through a typical day.

- ▸ Describe how you would expect to use the product/service.

- ▸ Are you somehow dissatisfied with our product/service?

- ▸ If you could change one thing about our product/service, what would that be and why?

Analyse and summarize your data and try to find repeatable patterns and similarities. Finally, build clusters or groups that…

- ▸ explain the differences you have observed among users,

- ▸ are different from another and

- ▸ cover all users

**Template**

Create a template for relevant characteristics (similar to other persona methods), like:

▸ Hard facts (e.g.: gender, age, education, job, family status)

▸ Interests /Values / Attitudes (e.g.: loves to travel, doesn't care much about fashion)

▸ Lifestyle / A typical day (e.g.: gets up at…, eats breakfast at work)

▸ Goals / Interests / Expectations / Motivations / Needs (e.g.: dreams of buying a house)

▸ Behaviour patterns and approaches / Personality (e.g.: is very open-minded)

▸ Usage of computer / Internet / TV (e.g.: owns an iPhone, streams movies and music)

▸ Others (e.g.: concerns, responsibilities, tasks, skills, knowledge, quotes, biography, brands, …)

Please have a look at the last page to find an example template.


## Step-by-Step Instructions

1. In Advance:

    1. Share analysed and summarized research data and the resulting clusters.

    2. Based on data participants form a first general idea of various users. Hypotheses can either rely on one person of a cluster or all attributes from a cluster are averaged.

    3. Decide upon a number of personas that makes sense to create, choose one as primary focus.

2. Separate participants into small groups (2-4 per group).

3. Explain the persona template.

4. Give each group 15 to 20 minutes to fill out the persona template (except of the story, if included in the template)

5. Give each group another 15 to 20 minutes to create stories (with situations and scenarios that describe solutions).

    1. Describe specific situations that could trigger the usage of the product or service.

    2. Create scenarios that feature the personas in the role of a user and place them in a specific context with a problem that needs to be solved.

    3. Try to include psychological aspects like emotions or motivations.

6. Let groups present their personas and their stories.

7. Compare different personas, discuss patterns and resolve conflicts.

8. Optional: Let the whole group do it again and collectively build one persona.

## Remarks, Tips, Limitations

‣ In most cases you don't need to create your own template, there are various examples online and you can modify them easily

‣ Try to engage the project team to use the personas throughout further processes by sending a one-pager to everyone after the workshop, putting posters in shared places or referring to them during meetings ("what would Thomas do?")

‣ Try to use primarily open-ended questions to collect data

‣ If the collected research data is very heterogeneous it may be difficult to create only a few personas with certain characteristics. Whereas a high number of personas would make it even harder to design a product or service that serves each persona. Therefore, on the one hand it is important to discuss priorities and set a reasonable number of personas but on the other hand this approach fosters new biases and specific user types would be left out.

‣ In general, the development of personas based on real data has some advantages over personas that are completely fictional. But using real data has some limitations as well as the data and therefore the resulting personas are limited to the investigated sample. Consequently, the method and the usage of real data decreases possible biases caused by the project team members but may produce other biases. Participants should be aware of the fact, that findings that resulted from a certain sample are not always easy to generalize.

‣ Similar to other persona methods, developing Engaging Personas in a project team is useful to focus on a user-centred design, especially in the beginning of a design process. Of course, those personas should be considered throughout the further process as well, but they should be combined with other methods as Engaging Personas are in most cases not sufficient as a guideline for the development of a product or service.

**Strengths**: Helps to justify design decisions due to the identification with personas.

**Weaknesses**: Can be expensive and time consuming. For the data analysis further knowledge is necessary.

# References

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