

# Role-Based Personas

NUMBER OF PARTICIPANTS	FACILITATORS	CATEGORY	DURATION	LEVEL OF DIFFICULTY
1-6	None	Define	25-30min	Simple

## Description

Role-based personas are used to identify what needs the target user group has, how their activities, behaviour and characteristics would be like, and most importantly, what roles do they take on. Creating such personas requires previous research and gathering both qualitative and quantitative data from the Empathize phase. By creating personas, a common understanding could be reached within the team and the design goal could be made clear. The reason behind is that a persona captures the typical motivations, behaviour and needs of the users and then generates a concrete example of such users.

The difference between role-based personas and other personas (goal-oriented, engaging, fictional, etc.) is significant. As the name suggests, such personas focus on the role of the user within an organization. Instead of identifying the goals users have to create personas, Rolebased personas are created by analyzing the different roles within an organization first, then further gathering information and constructing the persona based on the role information. Thus, the designers can understand how such a role will influence the users. Such personas could be used by organizations for better understanding users within the working environment and can be used for a long period of time by many stakeholders.

## Materials

- ▶ Pen
- ▶ Paper
- ▶ Previous data in forms of:
  - ▶ Interview recordings & transcripts
  - ▶ Data sheets
  - ▶ Infinity diagrams
  - ▶ Memos, etc.

## Preparation

Data regarding the target user group should be collected. A rough understanding of the organization and the working environment would be necessary. This helps define some roles based on the job titles, work routines, etc. Some questions should be answered before starting constructing the personas: What work activities does a user of this role have? What relationships within an organization are typical for this role?

Analyzing the previously gathered data is necessary. Because multiple methods of collecting the data and understanding the roles could be implemented, there is no unified guidelines of data analysis and representation. Nonetheless, it is important to include all insights gathered from the Empathize sessions, before creating the role-based scenarios.

## Step-by-Step Instructions

### 1. Specifying the role

The most obvious roles users may take could be the job title they have within an organization. However, the de facto role could be somehow different from the official role. Another approach is to interview the users themselves or people who have contact with them.

### 2. Gathering detailed data

The optional interviews from the previous step could be a good starting point. If the roles were identified already without conducting any interviews, interview should be conducted here.

### 3. Answering questions regarding the roles

The questions would include: What are the work and other activity routines of the role? What skills and knowledge the role have? What tools they may use? How intense is the work? What collaborators and competitors they have within the organization?

### 4. Creating assumptions and goals

Even though the goal is not the driven factor of such personas, creating some assumptions and goals of the users could help the design team in forming concrete design ideas later. The goal could be created before sketching the persons out (like the order here), or after it. An example of the assumption could be like: The role of a Product manager includes dealing with multiple team members of different roles, it would be tricky to remember all the contact information. The corresponding goal would be organizing the information easily.

### 5. Constructing the Personas

Here all the information gathered and the descriptive questions will be used for creating a persona. All group members should contribute to all sections of the

persona instead of designating a single section to one person. The reason is that all previous steps are a mutual effort.

### Remarks, Tips, Limitations

- ▶ Think of the role clearly before going deeper into the personas
- ▶ Sometimes it is not possible to create role-based personas if the users have no clear common organizations
- ▶ Combine the personas later with journey map, task analysis and other methods
- ▶ Role-based personas fit better in a business context

### References

Pruitt, J., & Adlin, T. (2010). The persona lifecycle: keeping people in mind throughout product design. Elsevier.

Adlin, T., Pruitt, J., Goodwin, K., Hynes, C., McGrane, K., Rosenstein, A., & Muller, M. J. (2006, April). Putting personas to work. In CHI'06 Extended Abstracts on Human Factors in Computing Systems (pp. 13-16).

Flaherty, K. (2015). How Much Time Does It Take to Create Personas. Nielsen Norman Group. Retrieved, 23, 2020.

Pruitt, J., & Grudin, J. (2003, June). Personas: practice and theory. In Proceedings of the 2003 conference on Designing for user experiences (pp. 1-15).



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