Personas & scenarios

TUTORIAL 3

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Personas

- Archetype or character that represents a potential user of your website or system.

- A narrative description of a synthetic **believable** user that represents an important usage pattern.

- Each persona should represent a different kind of a user.

- Personas tell a story and describe why people do what they do.

- To create an effective user persona:
  
  - **User Research**: understand user's behavior and motivation.
 personas

- Be more realistic than idealistic.
- User personas represent groups of people (not distinct individuals).

"I WAS JUST ON THE PHONE WITH A USER WHO SAID THEY DIDN’T HAVE A NEED FOR THAT NEW FEATURE. LET’S REMOVE IT FROM OUR ROADMAP."

Not a good idea to make broad generalizations (and decisions) based on single/handful of data points.
Personas

- Typical information to include in a persona:
  - Fictional name
  - Photo
  - Demographics (age, education, ethnicity, family status etc.)
  - Personality
  - Behaviour
  - Motivation
  - Bio
  - Attributes: specific to the product/system
  - Goals and tasks they are trying to complete using the system: This guides the overall structure of the design.
  - Needs and challenges (pain points)
  - A quote: Sums up what matters most to the persona, how it relates to the system.
CHARLOTTE WALKER
43, Los Angeles
FOUNDER

PERSONALITY
- Determined
- Organized
- Practical
- Resourceful
- Compassionate

BIO
Charlotte is founder of a small consulting firm, which she set up 5 years ago. The company is growing and she wants to reward the hard work of her team with bonuses. She also wants to hire a new employee to take some of the heat off her current team. She would like to ask the bank for a loan to go ahead with her plans.

She is married with two kids and a dog. She loves to run and after along day at the office, she is usually at the gym, if she isn't travelling for a client meeting. Her work requires her to be tech-inclined and she spends a substantial amount of time on her smartphone because of this.

Motivations

- INCENTIVE
- GROWTH
- ACHIEVEMENT
- POWER

Goals
- To be able to request a loan quickly and easily
- Hire a new employee rather than outsourcing
- Grow her startup 5% in the next 3 years
- Spend more time with her family

Frustrations
- Overworking current team, wants to expand but doesn't have funds
- Has no time for paperwork or long turnaround times outside the office
- Works long hours, travels a lot and banks are often closed or have long queues when she has time to go

Behavior
- Online banking (desktop)
- Text banking (SMS)
- Mobile banking (apps)
- In-person banking
- Telephone banking

Influences
- CREDIBILITY
- CLIENTS
- TECHNOLOGY
- FAMILY

Frequently used apps
- Bank of America
- Google Calendar
- PocketGuard
Example personas for mobile buyers

**Shen – “The follower”**

“I never get ‘the’ phone, I’m always one or two steps behind”

Shen uses his phone primarily to keep in contact with his family and enjoys using it to take photos of his children. Although he would like to own a smart phone so he can use it for emails and the internet, they are currently too expensive for his budget. Shen tries to keep his phone until he’s eligible for a discounted upgrade, although, if given the option, he would upgrade more often for the novelty of having a new phone. Constantly surprised at how quickly technology is changing, he is always interested to see new the newest phones on the market.

**Behaviours**

- Handset change reason
- Wait
- Need
- Price
- High tech toy
- It’s a tool
- Rivals in new phone
- Inexperienced
- Always looking
- Long term
- Expensive
- Smartphone expectancy
- Always looking
- Not very long
- Would change provider
- Yes, for the right deal
- Current provider is fine

**Key Characteristics**

- Age 35-45
- Shops around before renewing his phone
- Is price conscious, thinks twice before buying
- Is tempted by new phones
- Would consider upgrading if a life event called for a new phone
- Needs a good reason to spend money on a phone e.g. more megapixels on a camera
- Does not want to be embarrassed to pull out his phone in public

**Goals**

- Get to the end of his contract so that he can get a cheaper upgrade
- Get the best deal that he can, taking into account the rate plan and the handset
- Purchase a high-end phone when he can justify the extra cost

**Toby – “Fashion Phone Upgrader”**

“One year in phones is a long time”

Toby loves technology and has to be seen with the newest and coolest digital gadgets. His phone is not just about making calls; he loves using its wealth of features for everything he can: surfing the web, writing emails, social networking and using it as a personal organiser. Because he gets bored quickly with his phones, Toby is always looking for the latest toy and pays attention to new releases. He frequently upgrades part way through his contract and is willing to pay the upgrade fee to get the best phone. To him, a contract is a mere inconvenience, but something he endures to get a bigger discount off his new phone.

**Behaviours**

- Handset change reason
- Wait
- Phone perception
- High tech toy
- It’s a tool
- Rivals in new phone
- Attending
- Clone
- Price

**Key Characteristics**

- Age 20-35
- Is tech savvy
- Loves showing off his new phone to friends
- Would find a way to get out of his current contract for the latest phone
- Keeps up to date with the latest phones online
- Gets bored with phones quickly

**Goals**

- Have the latest, coolest phone
- Be up to date with the newest phones on the market
- Use as many features on his phone as possible
Scenarios

- Scenarios aim to address the persona’s goals.
- Think of the scenario as a situation where the persona uses the system.
- Scenarios are then used to form a **conceptual design** of the system, and set of functions the system must support.

- **PACT Analysis:**
  - **People**: WHO are the users?
  - **Activities**: WHAT are they doing?
  - **Context**: WHERE are they doing it?
  - **Technology**: HOW will they do it?
Scenarios

- It’s like a story where you have:
  - **Main character** - Persona
  - **Setting** - Where the action takes place? What conditions exist at the start of the task?
  - **Goal/Objectives** - What the persona wants to achieve
  - **Actions/Activities** that lead the persona towards their goal
Example

John wants to take notes while in class. Even though the slides will be posted online later, he wants to make sure he captures the most important points. Before the professor starts the lecture, he starts the note-taking application on his phone. The application automatically notes the current date, time and class. During the class he can press one of two buttons - to start recording audio or to take a picture. After recording, the application allows him to tag the recording with keywords. Later, when he is home, he can review his notes, synchronized with the powerpoint slides downloaded from the course web site. He can search by keyword, follow the lecture linearly, or sped up in time.
John wants to take notes while in class. Even though the slides will be posted online later, he wants to make sure he captures the most important points. Before the professor starts the lecture, he starts the note-taking application on his phone. The application automatically notes the current date, time and class. During the class he can press one of two buttons - to start recording audio or to take a picture. After recording, the application allows him to tag the recording with keywords. Later, when he is home, he can review his notes, synchronized with the powerpoint slides downloaded from the course web site. He can search by keyword, follow the lecture linearly, or sped up in time.
Scenario (Home Automation System)

Being away on a business trip - wants to check on home, give access to maintenance people.

PACT ANALYSIS

People: Michael Taylor, Bob Kirkland (carpet layer)
Activities: Unlocking his apartment door after receiving a message from his carpet layer, monitoring security footage to see what he does and when he leaves, and locking the door again.
Context: In Sydney, Australia attending a conference for work. He is in between sessions in his hotel room.
Technologies: Smartphone app, desktop web browser

Michael has come out of a 2-hour session on how IPv6 will affect internet infrastructure and decided to return to his hotel room near the conference centre. He receives a text from his carpet layer, who has arrived to do prearranged work to lay new carpet in the living room, saying he needs to get into the apartment. He verifies that it’s actually bob by using the camera facing the door. Michael opens the front door to his apartment remotely using his home automation system. While catching up on his favourite tv show on Netflix, Michael keeps an eye on the camera to monitor what bob is doing. He receives a text from bob saying that he is done and checks that bob has left before locking the apartment front door.
- Personas give scenario a context (story of how the product will be used rather than how a designer thinks it might be used)

1. **Persona**
   - Defines who the story is about. This main character has attitudes, motivations, goals, and pain points, etc.

3. **Goal**
   - Defines what the persona wants or needs to fulfill. The goal is the motivation of why the persona is taking action. When that goal is reached, the scenario ends.

2. **Scenario**
   - Defines when, where, and how the story of the persona takes place. The scenario is the narrative that describes how the persona behaves as a sequence of events.
Exercise

- Imagine you are building a mobile app for an online movie booking organization.
  - Get into groups of 2 or 3
  - Create 2 personas
  - Create a scenario for any one of the above created completed persona
Benjamin Tan
Age
29 years old
Occupation
Business analyst
Status
Single
Location
Singapore

I want to watch a movie with my friends but we do not know which theatre has the best seats and times

User Scenario
Benjamin sees a trailer of a movie on social media and decides to book a movie with his friends to secure the best seats for tonight.

Behaviour
I am frugal
I rely on reputable sources for ratings
I decide base on proximity and convenience
I am impatient

Goals & Needs
To successfully book movie tickets while in-between tasks
Compare availability between different cinemas operators

Painpoints
- Inaccurate/Unreliable content
- Frustrating online experience e.g. comparison of availability, inconsistent interfaces
- Long waiting time at cinemas + lack of seat security
- Manually informing friends of movie details

http://allan-zhang.com/portfolio/popcom-making-movie-booking-experience-efficient/
Michael Tan
Age: 36 Years old
Gender: Male
Occupation: Sales Manager
Status: Married
- Likes going to movies with friends
- Loves to hunt for deals
- Easy going
- Watches movies at least once a month
- Has money but no time

"I like watching blockbuster movies that feature my favourite actors at a convenient location with my friends."

Goals:
1. Bonding with friends, sharing an experience
2. Good easy entertainment
3. Watching the new blockbuster that everyone is discussing

Influencers
- Have fun
- See the blockbuster
- Spending time with friends

Environment (3 scenarios):
- Texting his friends at work in a groupchat while researching blockbuster movie showings on the mobile app, to figure out a time and location that works for everyone.
- Checking "Coming Soon" to learn about new blockbuster films on the mobile app while commuting on the MRT.
- Sitting at home on his sofa at the end of the day. Booking movie tickets through the mobile app after his friends have all confirmed a time and location.

What motivates a user?
- Friends unavailability
- Waiting for friends to reply
- No good seats
- Inconvenient location

What inhibits a user?
- Friends agreeing on a movie, time & place
- Available good seats
- New movie released
- Credit card promotions/ discounts
Sharon Lim
Age: 29 Years old
Gender: Female
Occupation: Digital Marketing Manager
Status: Single
  ● Been working for a few years
  ● Friends are quite busy
  ● Quite mature, knows what she likes
  ● Independent
  ● Has money but no time

“I am quite selective about movies I watch. So I’d ask if anyone wants to watch the movie. My friends are usually quite easy going.”

Goals:
1. Watch a good movie
2. Immerse in a film experience

Motivation vs. Abilities

What motivates a user?
  ● An immersive film experience

What inhibits a user?
  ● No good seats
  ● No time

What triggers them to purchase?
  ● A convenient location and time
  ● Available good seats
  ● Positive reviews
  ● New movie released

Environment (3 scenarios):
Checking "Coming Soon" page on the mobile app while commuting on the bus, to find out when a specific movie she has been waiting for comes out.
At work browsing the desktop website to see if there is a good film to watch, because she has free time after work.
At the end of the night in bed, checking locations for a specific arthouse movie that she has been wanting to watch on the mobile app.
Sophia Ng
Age: 19 Years old  
Gender: Female  
Occupation: Polytechnic Student  
Status: Single
- Likes to hang out with friends after class
- Receives pocket money from parents and has a part-time job
- Looks out for student deals
- Has time but no money

"Amongst my group of friends, we vote on the movie to watch based on online reviews."

<table>
<thead>
<tr>
<th>Goals</th>
<th>Influencers</th>
<th>Motivation vs. Abilities</th>
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</table>
| 1. Watch a good movie  
2. Immerse in a film experience |  | What motivates a user?  
- Spending time with friends  
- Easy entertainment  
- Watching the new blockbuster |

Environment (3 scenarios):

- Just after class, sitting at a student lounge browsing times and locations on the mobile app for a specific movie to share with friends.
- Commuting on the bus home, browsing movies that are currently showing on the mobile app.
- At home in the afternoon, booking a specific movie through the mobile app after agreeing on a time and location with friends.

What inhibits a user?
- Friends unavailability  
- Expensive price (No student promos/discounts)  
- No good seats

What triggers them to purchase?
- Friends agreeing on a movie, time & place  
- Available good seats  
- Students promos/discounts  
- New movie released
Other Conceptual Design Tools

- Brainstorming
- Card Sort
Other Conceptual Design Tools

- Mind Maps
- Scenario Mapping
Summary

- **Personas**: Describes the main types of users, not a specific user.

- **Scenarios**: How will the persona use the system to meet their goals?