Tutorial: Guerilla Personas
and the Gentle Art of Design Defense

Lorelei Brown

Personas are an invaluable tool to help organizations stop thinking inwardly and start serving their users. We'll explore to how to craft a set of personas in 10 hours or less, using whatever data you have, even if you don't have access to your logs, search data, or have a call center! Finally, we'll role play the Meeting from Hell, where you can learn to defend your design decisions using the personas that we'll create during the tutorial.

About the Speaker:

Lorelei Brown serves as the Director of User Experience at Matrix Group International. She has provided interface design, information architecture, usability testing, branding, editorial, and project management for clients as diverse as PBS, the National Association of Realtors, Easter Seals, UNICEF, MCI WorldCom, Qwest, Christian Children's Fund, and Prime Retail. Lorelei's passion is translating user and business needs into a user-centric, easily navigable experiences.

Guerilla Personas & The Gentle Art of Design Defense

Lorelei Brown, Director of User Experience

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About Lorelei

- Director of User Experience at Matrix Group International
- Likes to tell stories
- Superpower: balancing business needs with user needs

About Today

- We're going super fast!
- We're concentrating on gathering data and using it to be persuasive
- To get the most out of this time, you should know something about personas already
- I set time limits on sections of this presentation – I'll be at Happy Hour if you want more

What Do You Want to Talk About?

- I can talk more or less about
  – Approach
  – Data gathering
  – Surveys
  – Analysis
  – Presentation

- **You choose!**

About Personas – A Whirlwind Tour (5)

- They're little stories that talk about the user and their tasks & goals
- We can make them up, but they are most effective when backed by facts
- It's best if you can back them up with real user feedback
- But some data is better than no data, even it's global trends

What's the Right Format?

- There isn't one – traditionally they are about one person, and have very detailed demographic information
- Tip: demographics don't necessarily matter
- Tip: sometimes we need to talk about how people behave in groups
- Bottom line: conveys the mindset, the desires, the pain points
- Answers the question – Why Do I Care?

Traditional Elements

- A photo (pro: helps visual, con: can distract)
- A gestalt & a story
- Demographic information (age, salary, address, technology use)
- Tasks
- Pain Points
- Map to tasks, content, functionality

Strengths

- Great way to focus discussion (what would Bob the Middle Aged Guy do?)
- Concise summary of goals & tasks in context
- Everyone can relate to stories, but not many decision-makers want to geek out with data

Weaknesses

- Can be poked at as unrealistic
- Easy to make too many, fragmenting focus
- Beware the photo!

Let's Get Started! (15)

What do you have available?

- Analytics – Traffic, Search, Affinity
- Organizational artifacts
  - Communications roadmaps
  - Membership & business data

Analytics: Traffic

- **Traffic**
  - Can be debated – 'If my link was on the homepage, it would get more traffic'
  - AJAX can throw off traffic
  - Quantity is a red herring

Analytics: Search

Search
  - Great for getting user's language & terminology
  - Good snapshot of popularity and seasonal data
  - Great for seeing what's missing
  - Can be debated – 'If my link was on the homepage, no one would have to search for it'
  - Lou Rosenfeld is the master

Analytics: Affinity

- External navigation – who's linking to you, what keywords search for your site
- Technorati
- De.li.cio.us keywords
- Shows trends, but often not conclusive

Organizational Artifacts

- Membership data
- Marketing data
- Call center
- Take the time to look at the data if you can get your hands on it – trends can be deceiving

The Glory of the Survey

- Sometimes this can be a hard sell internally
- Give the opportunity to hear the voice of user
- Combination of multiple choice and open fields is best

The 10 Hour Survey

- Sets a benchmark for later
- Apolitical
- Quantitative & qualitative
- Data for right now, data for later

Surveys: Six Standard Questions

- Ease of use (1-5)
- Satisfaction (1-5)
- Frequency of visit (perceived different from actual)
- Internet experience (frequency and/or uses)
- What did you come here for? (multiple choice w/ open field)
- How can we make it better? (multiple choice w/open field)

Surveys: What You Get

- **Fast** Snapshot of use & satisfaction
- **Fast** Correlation between behaviors
- **Medium** Scan open fields for compelling quotes
- **Slower** Analyze open fields for trends

Surveys: Important Tips

- Do not discount the compelling quote!
- Scanning is not skimping
- Combine open fields with search language
- Overlay open field trends with business goals to evaluate website effectiveness

Got Nothing? Look outward

- www.census.gov – US geographic trends
- www.pewinternet.org – new use trends & demographics
- www.internetworldstats.com – worldwide internet use
- www.clickz.com – myriad of behaviors
- www.hitwise.com – search & business

Let's look at some data (10 minutes)

- Break into groups
- Read the business strategy
- Look at your data pack
- Identify 5 tasks/trends/quotes

Building personas: It's a balance (5)

- True representation of users
- Their reactions to business needs
- Persuasion to do the right thing

Big Fat Persona Tips

- You need 3-7 – fewer is better
- Focus on what everyone has in common
- Differences are important only when they're REALLY different
- It's about tasks, not demographics

If You Only Learn One Thing Today

Tie it all to the business need!

- Suggest metrics if there aren't already ones in place
- Find some way to measure qualitative goals

Let's Build!

- You Tell Me
  - Goals & Metrics
  - Key Tasks
  - Quotes

Build: What Are the Metrics?

- Traffic
- Affinity
- Ease of use

What Are Key Tasks

- What
- Why?

What Are People Saying?

- What's striking?
- What ties to metrics?
- What are the cries for help?

Put it all together?

- Who are our segments?

Huddle: Personas

- Take our data and draft a persona
- Don't forget
  - Essence
  - Key tasks
  - Pains
  - The story
  - Do we need demographics?

Let's share!

- What was hard?
- What was easy?
- What was important?

Take 5

- We'll run our meetings workshop next.

Time to Meet!

- Take out your meeting agenda
- Some of you are bosses, some of you are designers

What Happened? (20)

- What made your pitch effective?
- How did your bosses react?
- What's meaty? What's fluff?

Wrap It Up

- Some data is better than no data
- Tie your tasks to the business goals
- Set metrics
- Have fun!

Talk to Me!

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Thank you!

Don't forget your feedback forms !