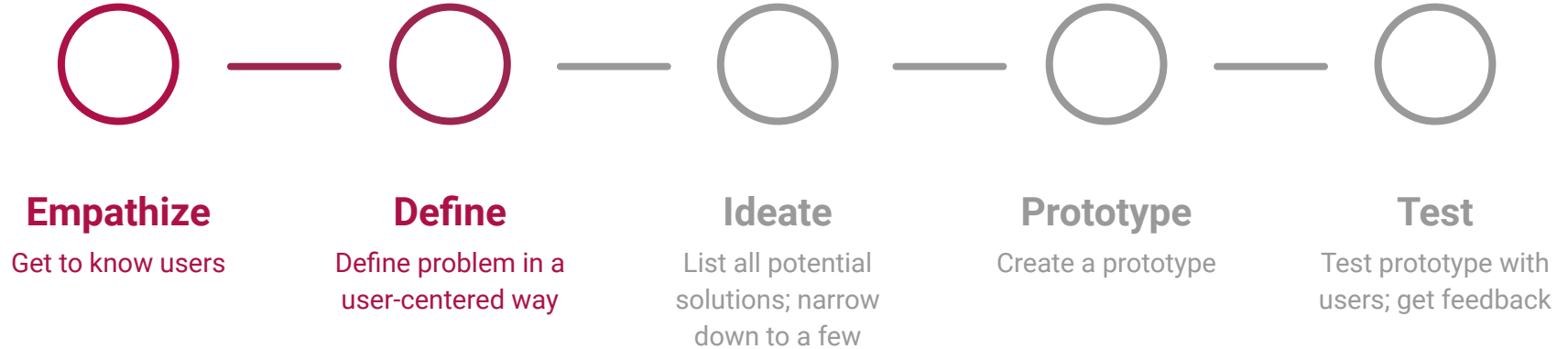


Introduction to UX Research

Lesson 6: Persona Research

Design Thinking



Persona Building

- **Persona** – *Who are you designing for?*
Characters used to represent different customer types
- **Use case** – *What are you designing for?*
Goals for how the product will be used



Persona Building

- **Goal:** Help product designers understand and empathize with target users
- Make sure personas resemble actual users
 - Conduct interviews
 - Get data about current customers
 - Aim for 3-5 personas



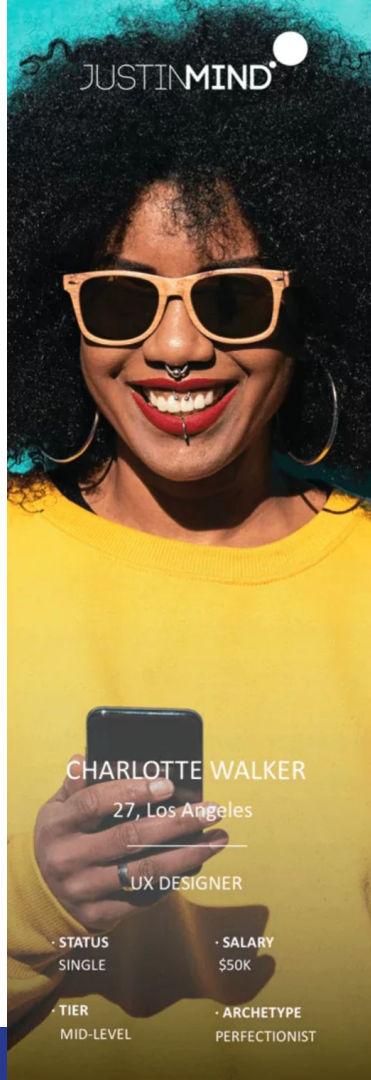
Persona Building

- Name
- Demographics (age, income, gender, location, occupation)
- Bio
- Personality
- Behavior patterns
- Pain points
- Goals
- Quote



Persona 1

Example



CHARLOTTE WALKER
27, Los Angeles
UX DESIGNER

• STATUS
SINGLE

• SALARY
\$50K

• TIER
MID-LEVEL

• ARCHETYPE
PERFECTIONIST

PERSONALITY

- Prototyping
- Interviewing
- Design Thinking
- Empathy
- Coding

BIO

Charlotte recently started a new job as a UX design in a mid-size bank. She moved over from the start-up world and is still getting used to all the changes, particularly the paperwork. She's excited to bring a user-focused perspective to the design department but nervous because she's the bank's first UXer.

Outside of the office she's a sports-mad psychology grad. She enjoys reading UX blogs and will sometimes go to UX-related conferences if they're nearby. She's also tuned into design channels like Dribbble.

Motivations



Goals

- Introduce user focused mentality and methods into traditional company landscape
- Improve usability of bank's customer facing interfaces
- Grow the UX team

Frustrations

- Getting buy-in for the new department's activities
- Dealing with more bureaucracy than in her old job
- Communicating necessity for change to development team

“I want to help my team deliver great user experiences”

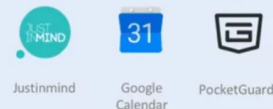
Behavior



Influences

- CREDIBILITY
- COLLEAGUES
- TECHNOLOGY
- BLOGS/ FORUMS
- PSYCHOLOGY
- UI TRENDS

Frequently used apps



Persona 2

Example

LISA MONTOYA



“ We must optimize our processes, implement new systems, learn to adapt. It's worth the effort in the end. ”

Age 32
Occupation Software Architect
Status Married
Location New York, NY
Tier Multi-use
Archetype Problem-solver

Bio

Lisa is the software architect at Blue Cable. She sees that larger companies have a difficult time implementing improvements. She wants to streamline communications and automate as many things as possible, to maintain an agile team.

Goals

- Discover new tools for communication, reporting, tracking and measuring
- Use small teams for large projects
- Update old frameworks to meet present standards

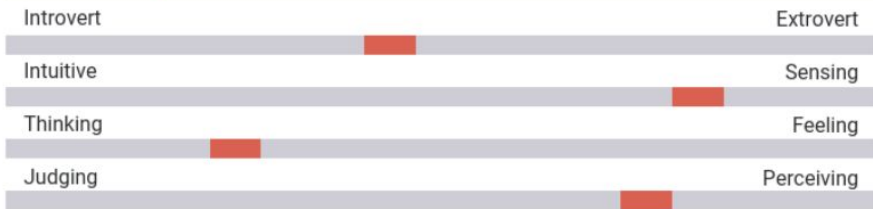
Frustrations

- Change is always met with resistance
- Learning curves slow down productivity
- Larger companies are more risk averse

Technology



Personality



Trusted Brands



User Segments

Segmentation

- Grouping the “market” (customers) into segments based on characteristics
- Should be based on real data (surveys, social analytics, purchasing behaviors)
- Discover trade-offs between different personas



User Segments

- Demographics (age, gender)
- Psychographics (interests, attitudes)
- Technology (desktop vs. mobile, type of phone)
- Geography (location, timezone)
- Product behaviors (frequency of product use, purchase online vs. in store)
- Motivations (what do you (dis)like about the product?)



User Segments

Net Promoter Score (NPS)



% PROMOTERS - % DETRACTORS = NPS (NET PROMOTER SCORE)

[Link](#)

User Segments

The resulting five segments proved attitudinally differentiated and demographically distinct.

	 YOUNG ACHIEVERS	 CONCERNED MOMS	 FINANCIALLY MATURE	 HO HUM	 SOLO CONTENT
	Young Achievers	Concerned Moms	Financially Mature	Ho Hum	Solo Content
Demographics	Younger Skews male	Young, Middle Age Mostly female	Mature Skews male	Middle Age Mostly female	Mature Male and Female
Attitudes	Early adopters, technical Driven, Risk taker Price sensitive	Use social media, but not otherwise technical Don't know where to begin Price sensitive	Recognize value of insurance Confident about financial matters Least price sensitive	Late adopters Risk averse Not primary decision makers and not thinking about LI	Use social media Mistrustful of financial inst. Least interest in LI
% of US	20%	20%	30%	20%	10%
% of MetLife	50%	30%	10%	5%	5%
Lapse Rate	Low	High	Low	Medium	Medium
Value	High	Medium	Medium	Low	Low

Target

- Large portion of market
- Right for business model

Minimize Cost to Serve

- Prefer face to face
- Low conversion
- Lower value

User Segments

01

User Personas

A persona is simply a user archetype - whose goals and behavior patterns are well understood. Personas include attitudes, behavior patterns, goals, skills, and anything else deemed important for the specific project, with a few fictional details and a photograph to help bring the persona to life.

ENVIRON

PERSONA 1

Meet
ELLEN

Married, Housewife, 44 years old
Cape Town, SA

Brand-conscious



"I hope to find specials to help me save money."

Goals

To purchase an Environ product that she already uses from the site. She likes to use product reviews and recommendations from other people to aid her in buying a product. She would like to know what special offers exist on the Environ site and is concerned about delivery, shipping and return policies.

Hobbies



Skin care expertise: High



Brand awareness: 9/10



Urgency: low



Price focused: 7/10



Digital orientated: 7/10



Low information demand



Spends most time



Social networks



PERSONA 2

Meet
JOEL

Single, Musician, 24 years old
Johannesburg, SA

Music-focused



"I want to find the right product for me."

Goals

Search for information around a skin care product that removes acne. Concerned about how long it takes to remove acne breakouts, the price of the product, saving info about his skin, proven results and recommended products. Being a novice to skin care products he also wants to know how to use the product.

Hobbies



Skin care expertise: Low



Brand awareness: 5/10



Urgency: low



Price focused: 7/10



Digital orientated: 7/10



Low information demand



Spends most time



Social networks



PERSONA 3

Meet
SANDY

Single, Student, 19 years old
Johannesburg, SA

Out-going



"My skin must look good for the school dance."

Goals

To purchase an Environ product that fits her skin type. She is going to a school dance with an hot date and wants to look the best. Concerned about price and setting up an appointment.

Hobbies



Skin care expertise: Medium



Brand awareness: 9/10



Urgency: High



Price focused: 7/10



Digital orientated: 7/10



Low information demand



Spends most time



Social networks



Link

Use Cases

- Document (1) how people will interact with a product or service and (2) determine requirements a product or service needs to satisfy the users
- It's a good idea to have a primary use case for each persona you create
- Helps prioritize items and establish a series of goals



Use Cases

- Use Case # 1: Name
- Description (1-sentence)
- Users (personas)
- Preconditions (what happens before the use case)
- Basic Flow
- Alternative Paths
- Postconditions (what happens after the use case)

[Link](#)



Use Cases

Name

UC-8: Search and Replace

Summary

All occurrences of a search term are replaced with replacement text.

[Link](#)



Rationale

While editing a document, many users find that there is text somewhere in the file being edited that needs to be replaced, but searching for it manually by looking through the entire document is time-consuming and ineffective. The search-and-replace function allows the user to find it automatically and replace it with specified text. Sometimes this term is repeated in many places and needs to be replaced. At other times, only the first occurrence should be replaced. The user may also wish to simply find the location of that text without replacing it.

[Link](#)

Use Cases

Users

All users

Preconditions

A document is loaded and being edited.

[Link](#)



Basic Course of Events

1. The user indicates that the software is to perform a search-and-replace in the document.
2. The software responds by requesting the search term and the replacement text.
3. The user inputs the search term and replacement text and indicates that all occurrences are to be replaced.
4. The software replaces all occurrences of the search term with the replacement text.

[Link](#)

Alternative
Paths

1. In Step 3, the user indicates that only the first occurrence is to be replaced. In this case, the software finds the first occurrence of the search term in the document being edited and replaces it with the replacement text. The postcondition state is identical, except only the first occurrence is replaced, and the replacement text is highlighted.
2. In Step 3, the user indicates that the software is only to search and not replace, and does not specify replacement text. In this case, the software highlights the first occurrence of the search term and the use case ends.
3. The user may decide to abort the search-and-replace operation at any time during Steps 1, 2, or 3. In this case, the software returns to the precondition state.

Use Cases

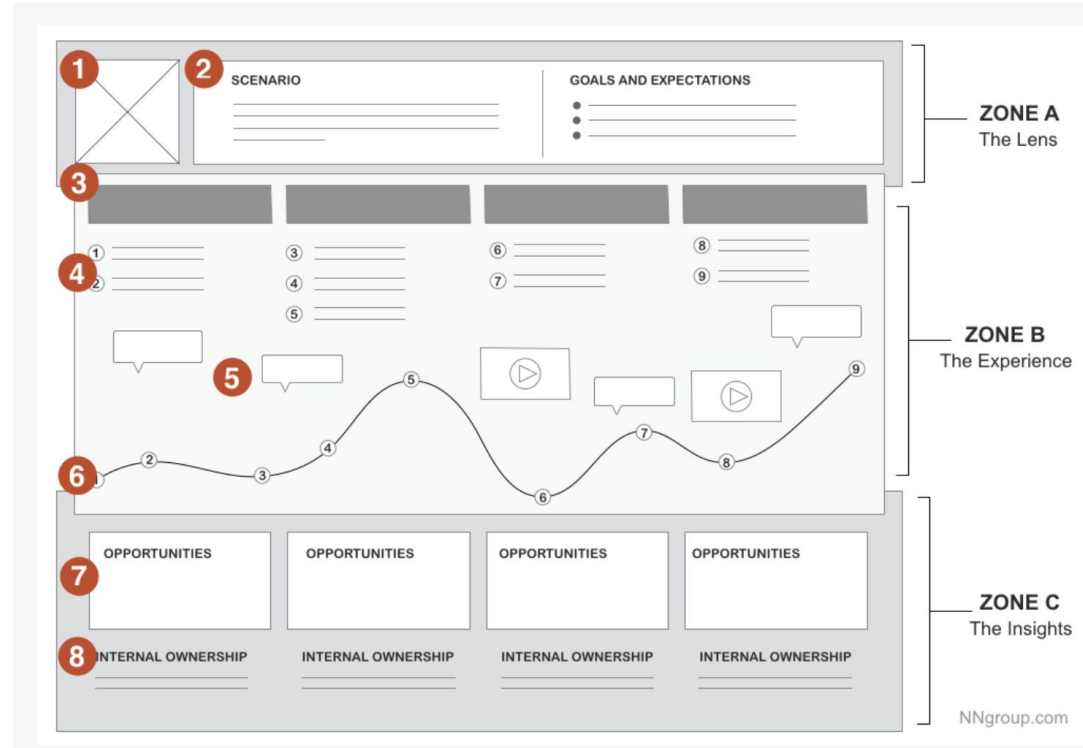
Postconditions All occurrences of the search term have been replaced with the replacement text.

[Link](#)



User Journey

- Holistic view of the user's journey through using the product (touchpoints, channels)
- Actions, thoughts, emotions as the user goes through their product interaction
- Insights, pain points, opportunities, plans moving forward



[Link](#)