



CREATING AND USING PERSONAS

Why They Are Important to Business Analysts
Regardless of the Approach





Personas are one method to better understand what needs to be delivered to whoever your users are. It's important to think of the various people that will be involved with your future application. The idea of personas dates back to the 1993-1994 era.

But over time, the acceptance of them has grown and is certainly a more common practice with Agile. However, the idea was conceived before Agile was spawned, and personas are helpful no matter which method you use.



PART 1: SO WHAT IS A PERSONA?

A persona is an imaginary representation of a particular user with a picture, name, and information about this user and what their goals are. Right away, there was resistance based on the idea of an “imaginary representation” of a user.

“Why can’t you just interview the REAL person rather than living in this imaginary world?” the critics would say. “This whole approach seems unserious and even whimsical.”

The reality is that it’s fine to interview the REAL users, if you can get to them, and then create various composite personas that represent and condense the various types of users. The persona created doesn’t really exist. They are multiple variations of compiled interviewed or theoretical users.

For example, think of Amazon. Their users are all over the place. Just from the perspective of people buying products, there are high schoolers, college students, young adults, middle-aged adults, grandmas and, retirees. The kinds of products they are looking for varies also. Are high schoolers going to be looking for a vacuum cleaner or other appliance for Mom? Is Dad as likely to be looking for cat toys as Grandma is? There are folks with high experience with technology, and those who can barely use a desktop. There are those who use many of the features of social media to find products and others who don’t even want to think about it.

Then there are vendors, big and small, who sell their products through Amazon. They want customers driven to their products in light of lots of competition. There is quite an array of individuals, small and large companies and just can’t be condensed down to “the vendor” or “the customer.” Spend time thinking of “who” is engaging with your product.

PART 2: THE SUBTLETIES

Just as Agile is not only about splitting the project into thin slices – it is way more than that. Personas are a way for teams to empathize with the various personas by creating a picture and name to represent a particular type of user. Will this help your user “Alice” to attain her goal of locating xyz online? What can we deliver that assists our vendor and user, “Jim”, in what he’s looking for as a vendor? There will be some things unique and some things that cross over many personas. Such as, all Amazon customers want to be able to search for products that match certain criteria, but only some users want to sort them a certain way.

PART 3: COMBINING INTERNAL USERS INTO PERSONAS

After identifying who can best represent various internal users, interview a mix of people who represent the various users – which is what you'd do anyway, right? Capture things as they relate to understanding the goals:

- Where they work
- Devices they use
- Software they use besides the main application if applicable
- Time of day that peak activity occurs
- Years of experience
- Bottlenecks
- Their key goals

For many situations, the range of users is outside the organization. Customers who will be ordering products, vendors that supply products to you, customers using services your organization provides for a fee, etc. You may be able to get some ideas from an area that deals directly with those users, like a customer service unit, a call center, or some similar group.

So then the team can use Personas to more clearly identify and create clearly answer who will be using your application.

Again, the idea is to create the Personas to provide real insights into what the various goals are, which in turn helps the team determine what needs to be delivered to meet those goals.

PART 4: BUT WHAT ABOUT EXTERNAL CUSTOMERS?

For many situations, the range of users is outside the organization. Customers who will be ordering products, vendors that supply products to you, customers using services your organization provides for a fee, etc. You may be able to get some ideas from an area that deals directly with those users, like a customer service unit, a call center, or some similar group.

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PART 5: PERSONA GUIDELINES

Keep them lightweight. Don't go overboard on detailed descriptions. It's counter-intuitive, but the more detailed the Personas are, the more it confines the team to expand their own thoughts about what is needed. They tend to get locked into serving the Persona as described vs. using the Persona as a starting point to understand clearly what the Persona's goals ultimately are – ease of use, the speed of decision making, etc. There are many ways to meet these goals. Remember, it is the Why and not the How.

The photo of the Persona needs to be a real person, not an icon or cartoon, smiling, and enjoying the results of using your application. They need to be distinct and memorable. Don't use celebrities as preconceived notions are hard to shake. Tips on using Google Images that are not copyrighted are explained below.

For example, if you created a Persona for an online ability to book flights, check in, change seats, search for earlier flights, etc. – like all the things you can do now, of course – you may have these things listed in a description of "Lance", the Business Traveler user. He travels all the time, changes his schedule at all hours. But his goals are ease of use, flexibility, speed, minimal delays at the airport kiosk, and quick contact with a human if the system is slow or down.

To attain these things, the team may consider the ability to select dates from a calendar vs. keying them in, quickly displaying flights that meet the parameters entered, etc. The goal of flexibility may result in the ability to deselect layover airports (i.e. Lance doesn't want to travel through Newark or JFK because of renowned delays at those airports) or maybe an automatic display of the percentage of on-time departures for particular flights. The team keeps focused on the goals to deliver the WHYs. Of course, there are various templates that are free on the internet.

PART 6: A SUGGESTED TEMPLATE AND EXAMPLES



Imagine we are developing software to schedule all the details for vacationers to go on a trip to Italy on our site, excluding flights. We have 4 categories of customers: Families with children, groups of adults staying at a villa, older couples, and couples looking for a romantic vacation. At our site, they can schedule everything – lodging, tours, guided museum tours, day trips, etc., that are specific to the customer category involved. Our site coordinates vendors who pay a fee for us delivering to the customers for their lodging/services.

We need to consider the needs of the vacationers to make it easy for them to find what they need. By creating Personas for each customer type, not forgetting vendors, we start to expand on what we can deliver that will satisfy WHY they want something. See the following examples.

<p> PICTURE & NAME</p>  <p>SALLY</p>	<p>DETAILS</p> <p>Role: Customer who is a full time working Mom, planning a family vacation with kids in Italy on our site. She has limited time to do this and wants a stellar result for all. Sally is very proficient with PCs and other devices.</p> <hr/> <p>GOALS</p> <p>"I want one stop shopping to plan the vacation easily and quickly to include activities that the whole family will enjoy."</p>
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The team needs to embrace Sally (and her family) and imagine what we can provide her to reach her goals, such as:

- **Require the DOB for the children and create a database of activities for certain age ranges from museums to day trips.**
- **Ensure that family-friendly restaurants are offered.**
- **Ensure we designate the walking distances involved in consideration of little tykes.**
- **Capture conditions that are challenges for strollers – steep inclines, cobblestoned streets, etc.**

<p> PICTURE & NAME</p>  <p>JOE</p>	<p>DETAILS</p> <p>Role: Customer who is retired and has plenty of time to organize the trip. Has some mobility issues, some vision issues, normally uses a laptop at home, does not use social media.</p> <hr/> <p>GOALS</p> <p>"I want one stop shopping to plan my vacation that results in easily accessible apartments, tours & day trips with minimal walking, restaurants that are on level streets/sidewalks."</p>
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Joe's persona gives us insight into a variety of things such as:

- **Creating our site with large enough fonts to make it easy to read.**
- **Maybe not devoting too much time to social media since it's irrelevant to Joe.**
- **Ensure we capture physical limitations that automatically direct Joe to apartments on the first floor, filtering out steep inclines, cobblestone streets, and sidewalks.**
- **Clearly, reflect walking distances for every activity and perhaps highlight activities that require little walking (i.e. boat tours)**

The team will describe what Sally needs vs. Joe's, or where Joe and Sally's goals intersect instead of referring to them as the "Family with Children" customer or the "Old Couple."

The Personas are like springboards into requirements development and it's yet another tool to use as a BA, regardless of the methodology.

Good luck with creating Personas. They are simple and help the team deliver what's best to meet the goals of the various Personas.



ABOUT THE AUTHOR

Rob is an accomplished corporate trainer, teaching courses in business analysis, requirements development, use cases, strategic planning, project planning and facilitating JAD sessions. He has planned and facilitated hundreds of workshops including project planning workshops, strategic planning events, JAD requirements sessions and many other types of collaborative solution workshops for organizations both in the United States and abroad. As a seasoned expert in business analysis and system requirements and analysis, Rob is both a gifted and experienced enterprise trainer and real-world project/business veteran.

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