Building Personas and Scenarios

1. Identify priority users
2. Summarise through personas and scenarios:
   - Who you need to support
   - What activities they are doing
3. Immersing in their world (research)
4. Observation, diaries, interviews, surveys
5. Desk research
6. Refine user groups
7. Analyse data for themes and patterns about use
8. Needs, motivations, activities, problems
9. Look for
Recap of last week

- Principles of UCD
- Lesson: you can’t (easily) make something “usable” at the end
- Cognitive engineering and a user-centered design approach to improving a power plant annunciator
User-Centered Design (UCD) Principles

- early focus on users
- early & continual user testing
- iterative design process
“These principles are obvious”

From Gould et al., *The 1984 Olympic Message System:*

- 450 designers/developers were asked to write down recommended steps in the design of an office system
  - 26% mentioned none of the three principles
  - 35% mentioned only one
How UCD works
[Denning and Dargan, 1996]

• [UCD] is based on understanding the domain of work or play in which people are engaged and in which they interact with computers...
  – Collaboration between designers and users
  – User & designer in constant communication
  – Design adapts and evolves to changing concerns
  – Specification evolves as a by-product
  – This is an iterative process!
Myth or Fact?

“Human factors is just fine-tuning”
or
“you can do usability at the end”

• But why should we care?
  (this is the “I’m just taking HCI for a credit” line)
Catching Usability Problems Early

• From IBM article, *Cost justifying ease of use*:
  – “usability equals profitability”
  – reports have shown it is far more economical to consider user needs in the early stages of design, than it is to solve them later
  – Robert Pressman (on the cost of problem solving):
    $1 during product design
    = $10 during development
    = $100 after release
Myth or Fact?

• “In real life, you can’t follow [the UCD principles]”
• “following them takes too long”
• “the principles don’t work on big projects”
• “you can’t test a system before it exists”
IBM OMS Experience
[Gould et al 1987]

• 200 iterations just on user guide!
• evaluation performed at every step
• resulted in on-time roll-out with no serious bugs
Today’s Agenda

- What’s a persona?
- How to build one
- Use-case scenarios
What’s a Persona?

- description of a representative user
- addresses questions:
  - Who the users are?
  - What activities do they need to perform?
  - Why they might use/buy/visit your product (motivation)?
Sample Persona: Background

Profile

A former news reporter, Jackie traveled widely to cover stories in Iraq, Sudan, and Egypt. She knows how to stay cool and think on her feet in disaster scenarios. Jackie is an expert communicator and easily liked and trusted. As an emergency arises, her first task is to drop everything and get to the Emergency Operation Center (often on site) as fast as possible, where she will be responsible for dispatching critical information to the media and public.

Personal Information

- **Profession:** Public Information Officer
- **Location:** Long Island, NY
- **Age:** 39
- **Home life:** Single Mom
- **Hobbies:** Soccer Coach, Book Club
- **Personality:** Outgoing, Intelligent

Background:
- Name, age, background, family, role/job, leisure activities/recreational interests, aspirations

persona credit: Jonah Model
Sample Persona: Tasks

Profile

A former news reporter, Jackie traveled widely to cover stories in Iraq, Sudan, and Egypt. She knows how to stay cool and think on her feet in disaster scenarios. Jackie is an expert communicator and easily liked and trusted. As an emergency arises, her first task is to drop everything and get to the Emergency Operation Center (often on site) as fast as possible, where she will be responsible for dispatching critical information to the media and public.

Tasks:
What are they trying to achieve?
Why are they trying to achieve this?

Personal Information

Profile: Public Information Officer
Location: Long Island, NY
Age: 39
Home life: Single Mom
Hobbies: Soccer Coach, Book Club
Personality: Outgoing, Intelligent

persona credit: Jonah Model
Sample Persona: Motivation

“When I got the call, my personal life faded away”

- Trustworthy
- Likeable
- Works well under stress
- Discerning

Motivation & Project Engagement:
What is their relationship to the brand/service/product?
What triggers the “interaction”? 

Jackie Sanders
Public Information Officer

Personal Information

- Profession: Public Information Officer
- Location: Long Island, NY
- Age: 39
- Home life: Single Mom
- Hobbies: Soccer Coach, Book Club
- Personality: Outgoing, Intelligent

persona credit: Jonah Model
Sample Persona: Characteristics

Jackie Sanders
Public Information Officer

“When I got the call, my personal life faded away”

- Trustworthy
- Likeable
- Works well under stress
- Discerning

Characteristics:
- Personality factors
- Technical factors (tools, ability, access points)

Personal Information
- Profession: Public Information Officer
- Location: Long Island, NY
- Age: 39
- Home life: Single Mom
- Hobbies: Soccer Coach, Book Club
- Personality: Outgoing, Intelligent

persona credit: Jonah Model
Dorte is 53 years old and works as a secretary in her husband’s plumbing business in the suburbs of Copenhagen. There are 5-6 assistants and apprentices in the company.

**Background**
When Dorte was very young she trained as an office clerk in the accounts department in a department store in Copenhagen. She was married at the age of 21 to Jan who had just got his skilled worker’s certificate. They have two grown-up sons who no longer live at home in the combined house and workshop/office. Their sons visit frequently as they still enjoy mum’s cooking.

Dorte likes to keep up with fashion. She often goes to the hairdresser, loves vibrant colours and elegant shoes. When she reads women’s magazines, she looks for small tips that she changes and makes her own. She is always smartly dressed and stays fit.

Dorte loves travelling to faraway countries; most recently, she and her family were on a trip to Vietnam this summer. Before they went, she spent time reading up on the country and also watched the film Indochine starring Catherine Deneuve. Dorte always discusses the vacations with Jan, who would prefer to go to Rhodes with old friends, but it is Dorte who has the final say about the destination.

In an average day, she tends to drink too many cups of coffee, and when the telephone rings all the time and she can’t reach the assistants, she also tends to smoke a bit too much.

Dorte makes payments to the Danish early retirement benefit scheme and looks forward to the day she no longer has to be the “mum” of others any more and can spend more time travelling.

**Computer use**
Dorte does the accounts and the bookkeeping, VAT, taxes, vacation pay, the Danish Labour Market Supplementary Pension ATP, etc. She uses a mini financial management system that she has mastered after many years of use, but sometimes the system is not completely logical.

If she were to use other systems or use new, digital reporting, she would prefer it to be demonstrated to her by someone. She feels unable to learn something new when it is just explained to her, and she dislikes reading user guides. She says it takes her a long time to study anything new and familiarise herself with it, and she tends to see more limitations than possibilities in new IT. Dorte often underestimates her IT proficiency and overestimates the time that it will take to learn something new, so she stalls before she even gets started.

If she needs IT help, her oldest son and, less often, a woman friend provide the support. The friend works in a big company and is a super-user of the financial management software.

**Reporting**
Dorte handles the tax cards for the business. She deals with and reports the wages, vacations, sickness benefits, and maternity leaves of the staff. She does the VAT returns and annual accounts of the company. In addition, she fills in the reports for Statistics Denmark and the Employer’s Reimbursement System AER.

Dorte does not understand the logic of the IT system and does not trust everything to happen as it should. If she sends in a return form or report digitally, she likes a confirmation saying that the recipient has received the form.

**Her workday:**
- She is not involved in the plumbing business as a trade, but she knows all the technical terms.
- She tidies things up. She does not want the others (her husband and the assistants) to make a mess in the basement where the office is as she is the one who has to look at it all day “Tidy up! Your mum does not work here!”
- She digs in and sometimes has to keep far too many balls in the air at the same time.
- She holds the fort, but does not get a lot of professional recognition in the company from the boss/her husband.
- She answers the telephone, handles mail, deliveries of goods (including invoices and delivery letters), and email.
- She handles the accounts, does some bookkeeping and writes invoices.
- She makes the coffee.
- She has occasional contact with the accountant.
- She does the invoicing of clients.
- She sends/delivers mail every day.
- She sends reminders.
- She handles customer contact (including damage control).
- She also walks the dog.

**Future goals**
Dorte dreams about a future where she no longer has to work and where she can spend more time travelling. She is still debating with Jan whether they should travel or buy a summer cottage where they can live all year round when they retire.
IDENTIFY PRIORITY USERS

IMMERESE IN THEIR WORLD (RESEARCH)

ANALYSE DATA FOR THEMES + PATTERNS

ABOUT USE

- NEEDS
- MOTIVATIONS
- ACTIVITIES
- PROBLEMS

SUMMARISE THROUGH PERSONAS AND SCENARIOS;
- WHO YOU NEED TO SUPPORT +
- WHAT ACTIVITIES THEY ARE DOING.

REFERENCE VIGNETTES
analysing research
building personas

- client workshops, interviews & site visits
- statistics (hits, keywords)
- survey
- secondary research
Exercise Time

- Take your notes from last week’s Trottier cafeteria observations
- Identify patterns
- Build 3 personas
Use-case scenario

- Who is the persona involved?
- What the user wants to do? (task model)
- What happens?
- Focus on activities and the context
Which is a better use-case scenario?
The winner

- use-case scenario should focus on the context
- should be specific, but not interface-specific
- describe all aspects of the task but don’t explain “how the user does it”
Personas:

Use-case scenarios:

Attributes:
- Observant, focused, meticulous, goal-oriented, busy with lectures, lab and material to study and prepare for next sessions (no time to waste).

Decision Points:
- It is important for him to have access to the key reading material. Questions like: “What is the next material to prepare for the following lab session?” “Where can I review (video, text format) the lab session from last week?”
- He is away from the McGill Simulation Centre, but he learned about a guest lecture he would like to attend. He wishes he could see and interact in this session.

Associated User Profiles:
- First year students (at a dissection or Anatomy lab)
- Higher year students learning basic surgical procedures
- Residents, and/or Senior Surgeons learning new surgical techniques

Scenario:

Mindset:
- Inquisitive
- Busy

Desired Features:
- Quick access to the next lab session. All resources together at one place.

During the first lab session on this topic, he wishes to be guided through the procedure.

He wishes to be informed of any remote sessions for residents at the Simulation Centre, easy access to the LIVE video streams of the session and related resources.
## Surgery tutor profile & use-case scenario

**Scenario**

He is invited to give a surgical session at McGill University. For this he needs to know his audience (students year), to establish the session objectives, application and preparation of pre-study (reading) material.

While delivering the surgical session to the students, he needs to point at the parts in a surgery procedure that are important to pay attention to.

**Desired Features**

- Ability to easily pre-deliver content and study material so that the students review it before the lab session.
- Interested in testing devices like "SurgiCam" while teaching certain surgical procedures. This is in order to present the different view points that he looks at while performing an operation.

**Attributes**

- Organized, meticulous, goal oriented, no time to spare, nevertheless always sets time to plan and prepare any surgical procedure at hand.

**Decision Points**

- Interested in tools that allow their students to watch + study / read + re-watch a surgical session.
- Attracted to systems that allow him to easily point his students to the key aspects of a lab procedure, e.g. where to focus and pay attention.
- Concerned by the subsequent usage of any medical material (prevent public morbid curiosity).

**Associated User Profiles**

- First year anatomy / dissection lab (tutor)
- Anesthesia techniques (tutor)
- Surgical techniques (tutor)
- Guest surgeon invited to give an endoscopic session

**Desired Mindset**

- Preparation mode
- Methodical and analytical thinking
- Enjoys reading about and testing new surgical and teaching tools (ideally non-obstructive and that are easy to learn to operate).
- Goal-oriented

**Most Desired Features**

*Video system that will allow me to guide the students while teaching a dissection or surgical technique... Objective and contextual information related to the subject of the study is an important asset pre- and post session.*

---

**Credit:** Adriana Olmos