Personas—Who Owns Them

Sabrina Duda

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Abstract

A method to shift a company towards user-centred thinking and product development is the use of personas. Personas are archetypical representations of real users. They summarise what we know about our customers or users; they are based on research and data (quantitative and qualitative research). Sometimes personas are developed by the marketing department, sometimes by the User Experience (UX) department. Typically, they are based on qualitative research like user interviews, observation, contextual research, and usability testing. Why should we use them? What should we be aware of?

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Personas are closely connected with storytelling. They are used for brand creation, in product development, and in service design.

Depending on their purpose, they differ: e.g. buyer personas are focussing on the buying process; personas within user-centred design are focussing on user needs closely related to product usage and typical tasks. With every persona, there are one or more stories: for B2C personas, the stories are more personal and related to problems users are trying to solve in their private life. But even for B2B personas with focus on business problems personal motivations and aspirations are playing a role.

### 8.1 What are Personas?

Personas are an archetype of a group of users. They are created by conducting user research and summarising trends into one or more archetypes. A persona does NOT represent a single person.

In Wikipedia, a persona is defined as a fictional character representing a user type: “A persona, (also user persona, customer persona, buyer persona) in user-centred design and marketing is a fictional character created to represent a user type that might use a site, brand, or product in a similar way” (Wikipedia n. d.).

#### 8.1.1 Why Do We Need Them?

Personas are a communication tool. They are summarising what you know about your user. They are helping to highlight pain points and opportunities to tailor your product to your user. They are keeping your product focussed on your key users rather than building it for the whole world.

The base for personas are real people, with real problems. You have to see them, talk to them, and observe them. It takes time to listen to your users or customers. This is the reason why many approaches to personas are failing because they are not based on real user research.

#### 8.1.2 Where Do They Come From?

The concept of personas has been around for quite a while. Alan Cooper, software designer and author, developed personas in the early 1980’s to empathise with users of the software he was designing. He wanted to help his clients see the world from users’ perspectives. Personas communicate user-centred knowledge to those who have not done the research themselves. Alan Cooper used interview data from 7 to 8 users to create personas as early as 1983.
He made the concept of personas popular in his 1998 book ‘The Inmates are Running the Asylum’. Cooper is warning of ‘The Elastic User’, which means stakeholders are defining ‘the user’ just as it pleases them. Designing for delight means designing for individuals—Alan Cooper says: ‘If you design for everyone, you delight no one. That is the recipe for a mediocre product’ (Cooper 2008).

Over 15 years ago, I had the pleasure to assist as a student volunteer in a persona workshop held by Alan Cooper at an HCI conference in the US. At that time, personas were not as popular as today. It was still a long way to go. I remember him talking about Six-Pack Joe.

### 8.1.3 Relying only on Demographics and Average Numbers Leads to Failed Products

On the one hand, we have an individual person, with individual problems and needs... and maybe there are some other people somewhere with similar needs. That is when you are grouping these users into one persona. On the other hand, we have demographic data, average values, and numbers. Sometimes it is very hard to imagine the people behind the numbers. Is there really such a person as the average person? Probably not. If you are a bit familiar with statistics, you will know how misleading average numbers can be, for example when you have outliers distorting the average value.

“Reliance on demographic attributes is one of the main reasons around 40% of new products fail” says Clayton Christensen, Professor of Business Administration at the Harvard Business School.

He is reporting the case of a fast food chain selling milkshakes. Their segmentation of milkshake buyers by aggregating data failed. Observation revealed the existence of two totally different user groups: Car commuters in the morning used the milkshake as a breakfast (a free hand didn’t make a mess) and parents in the afternoon for their children as add-on. A one-size-fits-all product strategy failed because both groups have different needs (Sauro 2017).

### 8.1.4 Finding Your Customer… it is not the Average Joe

The concept of personas is quite simple: In designing a product, or a brand, or a marketing campaign for a person who could be real you do not fall in the trap of making your target group too broad, losing focus, or trying to please all possible customers by creating a product with hundreds of features.

Personas have become a kind of fashion recently. Despite that, there have been reported problems in convincing stakeholders about personas; or managers asking for personas not based on real user research. Personas should always be based on qualitative user data, gained via face-to-face interviews and observation. You can use quantitative data as
well. But When personas are purely based on quantitative data and demographics, they are less useful and therefore, their value is questioned by some.

### 8.2 User Goals and Needs

When you are thinking about user needs, and when you know who your user is, you can refine user needs to user stories. A user story contains a user’s role, wants, needs and goals.

As a user I want/need to [...] in order to [...].

An example is a user story for the register to vote service offered by the UK government: “As a UK resident, I want to get my details on the electoral register so that I can vote”.

When you want to create personas, user needs are a basis for them. You should find out about your users’ needs, challenges, pain points, goals, and motivations (see Fig. 8.1).

A good framework for thinking about which needs a product is fulfilling or addressing is Maslow’s hierarchy of needs (see Fig. 8.2).

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**Fig. 8.1** User goals & needs
8.2.1 Addressing User Needs Successfully

Airbnb with the theme ‘Home away from home’ is doing a brilliant job in addressing the emotional need of feeling at home; according to Maslow’s hierarchy of needs this would be ‘Love/Belonging’ and ‘Protection & Safety’.

On the website of Airbnb the emotional need of feeling at home is addressed (see Fig. 8.3) and the emotional need of social belonging (see Fig. 8.4).

That they are able to address the users’ emotional needs is reflected in a steep listing growth for Airbnb. The vacation rental listing growth for Airbnb from 2011 to 2016 was from below 100,000 in 2011 to almost 2,000,000 in 2016. For booking.com, it went from around 100,000 in 2012 to over 400,000 in 2016 (Andrews 2017).
Fig. 8.4 Airbnb home page ‘Belong anywhere’

8.3 What do Personas Include?

- Bio/demographics
- Behaviours
- Pain points
- Goals/needs
- Motivations (can be hidden)

A basic template for a persona is consisting just of name, picture, demographics, behaviours, needs & goals (see Fig. 8.5).

Further details to make your persona come to life are: name, age, family status, job, education, area and circumstances where they are living, income, digital competence, preferred devices, interests, leisure time activities, personality, moods, attitudes, and behaviours.

Fig. 8.5 Basic persona template

<table>
<thead>
<tr>
<th>Name</th>
<th>Behaviours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Picture</td>
<td></td>
</tr>
<tr>
<td>Demographics</td>
<td>Needs &amp; goals</td>
</tr>
</tbody>
</table>
8.4 Examples of Personas

8.4.1 E-commerce Personas and the Customer Journey

Miss Very is a persona of Shop Direct and represents a customer of very.co.uk (Rumsey 2016). She is based on customer interviews and has been created for internal purposes to increase customer focus. She is mainly used for marketing. Marketing personas are not always addressing the specific user experience on a website. For UX and website development, we need to develop personas which take actual behaviours and user journeys on the website into account.

In e-commerce, everything is about a seamless customer experience, cross-channel, etc. That means we are designing the whole user journey, online, offline, mobile, desktop, which media users get inspiration from and how the whole journey is starting. UX researchers of Shop Direct have even been on a delivery tour to deliver a very.co.uk order to a customer, in order to explore the offline parts of the customer journey (as reported on LinkedIn on Oct. 9, 2017). The buying process is going back and forth between different media and devices, online and offline. For example, when you want to buy a sofa, you might get inspiration from Instagram, try a sofa in a real store, search online on your mobile on your way to work, narrow down your search at home, try other sofas offline, and finally buy at your desktop computer. A UX persona is describing the customer journey for the persona.

Here are some examples for e-commerce personas with their quotes:

- Aspiring Amy: “When I had a bad day at work I need something to look forward to, like wearing a new dress at a girls’ night out.”
- Busy Bridget: “I have a busy life with work and two small children. So I need to find and buy the things I need quickly.”
- Research Ruth: “When something breaks down in my home, I need guidance in my purchase decision, to get best value for the best price.”

8.4.2 Buyer Personas

A persona example (see Fig. 8.6) from Xtensio is Clark, a software developer who is concerned with a healthy lifestyle and wants to track his health and performance. He could be a persona for health tracking tools.

Fresh Food Felipe is a buyer persona for Chipotle, a Mexican Grill: “Felipe is always on the go. Whether he is meeting with friends or on his way to the library, he finds himself perpetually busy. He is on his parents’ budget; about $12,000 annually. He is constantly hungry and eats a lot, but also tries to eat healthily.” Chipotle is helping him to
solve his challenges: “We provide a healthy, filling meal on the go. Our food is affordable, yet the healthiest fast option” (Luechau 2015).

Another example for a buyer persona is “Steve, 47, CEO of large financial company worth 485 million. How he finds us: He was referred to us by someone he trusts. He comes to the website at the beginning of his buying journey. He isn’t interested in using the information on the site beyond research” (Seweryn 2017).

8.4.3 Niche Personas

You can even find a persona for the role of Director UX: “Judy, Director of UX, recently joined a global bank. She has 8 years of UX experience and focuses on enterprise products. She is leading a team of 10 designers. Some of her pain points are: legacy systems prevent innovation, no standard design process leads to chaos, etc. … Her goals are to create a consistent UX across a suite of 5 products. Her tasks and behaviours are staying up to date with UX best practices, 70% of her work day consists of meetings, etc. …” (Cao 2014–2017).
8.5 How do you Create Personas?

Ideally, a whole team is creating the personas. You need to get stakeholders buy in. Otherwise, the personas will disappear in a drawer in the office. Quite often a company commissions an external agency to develop personas but then they are not ‘adopted’ by the employees of the company because they did not contribute to their creation.

A lot of knowledge about your personas is already in the company. Imagine all the departments dealing with customers: support, sales, and professional services. They all know their customers and an image of them has already formed in their minds. Tap into that source. If you do not have access to real users yet, use other sources and develop preliminary personas, so called proto personas. They are based on assumptions and are like a hypothesis about your users that still needs to be validated.

In Fig. 8.7, you see several sources you can use as input for personas, even if you cannot interview or observe users.

Figure 8.8 shows the basic procedure of creating personas from research. Use qualitative and quantitative data from as many users as possible and look for common needs, goals, and behaviours of the users. Usually, you should aim for not more than 3–5 personas and, to keep focus, you can even choose one as primary persona.
8.6 Combining Agile with User-Centred Development

Companies who are developing products in a user-centred way seem to be best prepared to successfully use personas, and often they do. Agile development is state of the art in software development and many companies are changing their software development processes from waterfall or iterative to agile. The only backdrop is that often it is difficult to integrate user research and user-centred design into agile development (Salah et al. 2014).

The reason is that agile development can be quite fast paced, with two-weekly design sprints or even a design sprint within one week, so that it is almost impossible to squeeze user research into it. Sometimes, you can deploy guerrilla techniques for user research, interviewing users in the café or on the street, or interviewing people from within your...
company or friends and family. This is only possible when you want to explore opinions and acceptance of end user (consumer) products.

Sometimes, the lack of UX research and of trained UX designers in agile working agencies or companies results in bad products. They might have done their homework and defined user needs. But they just defined them like THEY thought they would be. The user needs were not based on real user research or customer contact. The resulting products are not user-centred, sometimes not even usable. In some cases, the product development then stops completely, because the client quits the project (after possibly having spent millions of pounds).

8.6.1 Government Digital Service (GDS) Standard From the British Government

The UK is number one in e-government worldwide. This has a reason. The GDS (Government Digital Service) standard of the UK government combines both agile AND user-centred development. Each agile development team at GDS has roles for product manager, service manager, delivery manager/scrum master, user researcher, content designer, designer, developer. They design a service. The design is research driven; it starts with exploring different users/stakeholders involved in the service.

For example, in a service offered by the Ministry of Justice up to 10 or more different user groups might be involved: Judges, call centre, appellant, family/support of appellant, etc. In the so-called discovery phase, you are exploring the needs and pain points of these users and start creating initial personas. In the next phase, the alpha phase, you are developing a prototype of the service and are testing it in an iterative way with users in exploratory or usability sessions. With each iteration, the prototype is improved by integrating user feedback and solving usability issues, adding new features. With the observations you have made with the users, you can refine the personas step by step. The picture of your users is getting clearer and clearer with each session; you are summarising characteristics, attitudes, behaviours into a few personas. These personas are differing regarding their user needs and behaviours, but not necessarily regarding their demographics (or roles or industry when it is B2B). The main question is: Do we need to address their needs in our service or product in a different way? Or can we summarise them into one persona? Most important is the focus on the end user. Despite the fact that you can have multiple different user groups of your service (e.g. internal staff), the GDS approach is strictly focussing on the end user. If you have several personas, you should to try to focus on one primary persona, if possible. In keeping personas minimalistic they are easier to remember and to work with. Figure 8.9 gives you an overview about the GDS process.
8.6.2 Emotional Situation of the User and Implications for Service Design

An example: When you think about someone in an appeals process, e.g. appealing against having their benefits cut, this person is in an extremely stressful situation and probably emotionally upset; furthermore, someone receiving benefits can be a vulnerable person with personal difficulties or problems. That means any digital service you are designing has to be very clear and transparent. Avoid information overload, show users exactly where they are in the process to reduce uncertainty and anxiety. Furthermore, special attention has to be given to the content and language. Addressing the user in a supportive, understanding and friendly way is essential. The situation the user are currently in has to be taken into account: they are without benefits, they suffer financial hardship, they do not know when and if they will get their benefits back, they are afraid of the hearing where they have to testify. The design of the service and the communication with the user has to address this. If the design is not able to do this, it can result in a run on the call centre with upset calls, therefore a large cost rise, and lots of stress and frustration for everybody involved. It is not just about digitalising a form, GDS is designing services.

8.7 B2B Personas

8.7.1 How to Research B2B Personas

In B2B, the procedure for developing user-centred products is quite similar but in some aspects a bit more challenging: It can be harder to get access to business users to research them. It is expensive to recruit them or at least hard to convince them to spend time with you, as time is rare. Cancelling and rescheduling is quite common. You have to be very
flexible, and in many cases you have to resort to remote interviews with, e.g., WebEx. Sometimes you even have to convince account managers first to get access to their customers. Use cases, user journeys, and user groups for B2B products can be quite complex. Use cases are crucial for developing the right products and finding the right approach to the market and selling them. Figure 8.10 shows you research questions for B2B personas.

It is worth creating B2B personas because “B2B customers are significantly more emotionally connected to their service providers than consumers” (Nathan and Schmidt 2013).

As Roman Pichler points out (Pichler 2013), you need to distinguish user and buyer personas, which is especially important regarding high-priced B2B software.

The best results regarding user research and personas can be achieved when the development team is closely involved in the research. UX is a team sport!

Not every agile development team has the luxury to have its own researcher. Sometimes several product teams are sharing one researcher. Still, the whole team should be involved in research. Some B2B products are difficult to use, so the researcher might need people with expertise of the product to work with him or her together on the research.

### 8.7.2 A Persona Family

B2B products can be very expensive, from £50,000 to £100,000 or more. Thus, many people are involved in the buying process, and the buyer is not necessarily the user. Furthermore, there are different use cases problems the buying company wants to solve with the B2B product.

Figure 8.11 shows possible different roles within one company involved with one product: Director of Marketing, ECommerce Manager, IT Administrator.

![Fig. 8.10 B2B personas and research questions](image_url)
B2B personas: persona families

Fig. 8.11  B2B persona family with different roles within a company

8.7.3  Stages of the Buying Process and Different Roles

To develop personas with different roles within the company – a director who makes the buying decision, a manager who is managing the research of the product together with the IT admin, the IT admin who is responsible for setting the product up, configuring it and maintaining it, and finally the end user actually using the B2B product – is crucial both for user-centred software and for marketing and selling the software. Sales has to address the right user pain points (key issues), to ask the potential buyer the right questions (key questions), in order to sell it. Figure 8.12 gives you an overview about the stages of the buying process and which role is involved in which phase.

8.8  Why Do We Need Personas?

8.8.1  Personas or Jobs-to-be-Done?

The question why do we need personas and, along with that, how can we measure the success of personas is important regarding management buy-in. In a persona workshop I gave in 2016, the one thing that troubled participants most was how to convince management of personas.
## Stages of buying process

<table>
<thead>
<tr>
<th></th>
<th>Influencer</th>
<th>Buyer</th>
<th>User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify need</td>
<td>Research</td>
<td>Choose a</td>
<td>Set up the</td>
</tr>
<tr>
<td></td>
<td>suppliers</td>
<td>supplier</td>
<td>product</td>
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<tr>
<td>C-Level</td>
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<td>Support &amp;</td>
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<tr>
<td>(e.g. Director</td>
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<tr>
<td>of Operations)</td>
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<td>M-Level</td>
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<td>(e.g. Marketing</td>
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<tr>
<td>Manager)</td>
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</tr>
<tr>
<td>Admin-Level</td>
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<tr>
<td>(e.g. Implementation</td>
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<tr>
<td>Engineer)</td>
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</table>

Who is involved in which stage? Which communication channel is preferred, which messaging is appropriate?

**Fig. 8.12** Stages of buying process and different roles involved: Influencer, buyer, user

Personas, some might think, seem to be a fluffily playful thing, nice to have, quite funny but nothing serious, and certainly not important for revenue. The truth is, we can be successful even without having properly designed personas, if only we know about ‘jobs-to-be-done’ and use cases of our customers. Jobs-to-be-done is a framework for focussing on the users’ tasks they want to solve with the help of the product.

Knowing what problems your customers have and how you can help them with your product/service to solve them is crucial for a successful product. ‘Jobs-to-be-done’, pain points, business problems are at the heart of each persona. Having complete personas can certainly enhance empathy for your customers and focus your development.

“Jobs-to-Be-Done don’t promote empathy”. “Jobs-to-be-done focus on user problems and needs, while well-executed personas include the same information and also add behavioural and attitudinal details” (Laubheimer 2017).

Figure 8.13 shows you the phases of product development and how personas can add value to each phase:

### 8.8.2 Different Approaches to Personas

One tweet by Indi Young (Young 2016) says: “Please remove age, gender, ethnicity, location from your personas. None of these things cause behaviour/thinking. But they cause assumptions.” Even when trying very hard not to fall in the trap of prejudices it is almost impossible. Personas are archetypes, which means they are a kind of simplification, they bring characteristics to the point, and you could even call them a kind of positive stereotype. Stereotypes are not necessarily bad. The human brain is working in a similar way to get hold of the endless swell of information and make sense of it. Without simplifications we would not be able to survive. The human brain is trying to make sense of the
world in the most efficient way. I had a similar discussion in my last persona workshop: participants asked whether personas were not a stereotype, and wasn’t that a bad thing? As long as you do not serve negative stereotypes and are able to create a positive persona, a likeable persona people can emphasise with, it is alright.

In a similar way, some people favour real pictures in personas, others are preferring comics or symbolic pictures. There is not one right way to do personas; it depends on what is best for your team and company.

8.8.3 Criticism and Scientific Evidence

Personas have been criticised for being non-scientific, that means the process of creating them is not a scientific method. Of course, it was never meant to be scientific. Design or software development are not scientific processes either, both are creative work.

The other problem, that they are said not to really represent real customers, goes often together with a persona approach not based on real customer research. If persona creation is based on real customer data, like interview and observation, they are a good method to summarise the research results.

One study is showing some of the benefits of personas: Groups of students received a design brief to solve, some groups used personas, some did not. The groups who had been using personas for creating their design, produced a more usable design and
received higher grades. There were also hints that communication improved with the use of personas and was more user-focused (Long 2009).

### 8.8.4 Measuring Success

Many companies are mainly concerned with conversion rates. Surely, this is an important way to measure the success of your UX improvements and your customer focus endeavours. The other measurement relevant to management is the Net Promoter Score (NPS) measuring customer satisfaction via willingness to recommend. However, beware of just focussing on boosting up conversion rate, this can easily turn out to be short-sighted and even counterproductive. High conversion rates are a side effect of true customer focus and will come naturally when you develop your products, services and marketing campaigns according to your users’ needs with the help of personas.

### 8.9 Practical Tips for Using Personas

#### 8.9.1 Integration of Personas into Development Tools

Some software development tools for agile development, like Visual Studio Team Services (VSTS) from Microsoft, offer the integration of personas. You can define basic personas in VSTS with a name, a short description of their role, and a definition of their goals. For each user story or feature you can select the affected persona by tagging it with the persona’s name. The persona plug-in is an extension by Agile Extension; as per Oct. 8th 2017 there are 2546 installations.

An example of personas for VSTS found in fantail.io blog is “Tanya TravelAgent: Tanya is a travel agent and books flights, accommodation and events for customers. She is the Primary Persona of the system. Tanya is an expert user.” “Her goal is to book the best travel for customers as easily and quickly as possible” (Fantaill 2017).

#### 8.9.2 Marketing of Your Personas

Last but not least, you have to market your personas; otherwise, they will not be effective. Make them visible in your company. A concise and focussed persona, with a picture, a significant quote which shows a central user goal or pain point, a telling name, main goals and pain points, helps people to empathise and to remember them. You can circulate personas as paper fliers, or put them in your cafeteria or on the canteen tables.

Adopt a persona! Personas are living. Update them regularly with the latest research findings. Have fun in finding, nurturing and promoting your personas.
Missing Persona

Fig. 8.14 Missing persona: persona non grata. (Axure Blog Medium Fidelity 2017)

8.10 Conclusion

And who owns personas now? We should all work together in developing and using personas. User experience is closely connected with branding and marketing. We need to think about personas for the whole customer journey. We need to take into account qualitative data from user research and usability testing from the UX team, demographic data from the Customer Insight team, Google Analytics data, LinkedIn, etc.

They are ours. We own them all. And we should live with them, daily. And we should nurture them with current data and help them grow and develop (see Fig. 8.14).

References


Sabrina is a Psychologist specialising in Engineering Psychology and Computer Science with over 20 years of experience in user research. She has founded one of the first usability agencies in Germany and has worked for companies like eBay, Deutsche Bank, Ford. Since 2015, she is living in the UK, and has worked for Shop Direct, MOJ, and currently Experian Data Quality. Besides UX and design, she has a passion for dancing, music and motorbikes.

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