JEN KRAMER
PLANNING SUCCESSFUL WEBSITES & APPS

CLASS TWO
UNDERSTANDING PERSONAS

What is a persona?

Why do we need personas?

End opinion wars

Avoid the "me-persona"

Inspire empathy

BRANDI TYLER

MUNRO AMERICAN

PROFILE	Narrow Feet
GENDER	Female
AGE	36
LOCATION	Los Angeles, CA
OCCUPATION	Receptionist; $38k

"It's SO difficult to buy shoes that fit my feet."

MOTIVATIONS

Brandi gets very emotional about shopping for shoes in retail stores because she rarely can find a pait that fits her narrow feet. Recently, she's turned to online shopping to avoid the hassle of shopping in stores. Brandi found Munro after Googling "narrow width shoes" and reading other reviews online about the company.

GOALS

- Needs an SS (4A) width shoe
- Would like to purchase several pairs to fit occasion, style, and color
- Hoping to find that she doesn't have to sacrifice style or options when searching by fit

FRUSTRATIONS

- Not being able to filter available shoes by width
- Getting far fewer options when she applies width filter
- No other recommended shoes when she's looking at a pair she particularly likes

REAL MUNRO CUSTOMERS

"My whole life has been a choice between fit and style - when I was younger, I went for style & my feet killed me. As an adult, I tried for fit & the styles were for 95 year olds. This shoe is the 1st time I could get both."

"I wear a 4A and I have struggled my entire life finding shoes narrow enough for my feet and more so in recent years. I stumbled onto this Munro brand sandal and was shocked to find it comes in up to a 4A width and it actually fit and is like wearing a glove! I now have two pairs in different colors."

"Love these slides so much I went out and bought two more pairs. I have very narrow feet and they fit perfectly. They're very stylish and I get compliments whenever I wear them."

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COMPONENTS OF PERSONAS

Ad-hoc persona

Diana Lopez, MD

Narrative:

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Frustrations:

- A lot of her time is taken up doing paperwork and seeing patients who don't really need to be there
- Most of the hospital's technical systems are old and annoying to use

Tasks:

- Check on which patients are due to submit follow-up information online
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"The way we're used to seeing patients just doesn't work for everyone. If I can save some patients a trip and also get more time in my day, that's huge."

Name & Demographics

Photo

Quotation

Narrative

Goals

Frustrations

Tasks

Name

Age

Gender

Occupation

Geographic location

Relevant lifestyle issues

Stock photo

Made up quote, or quote from research

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Narrative: Describe the problem and how it impacts the persona's daily life

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Goals: Specifically address that problem stated in the narrative

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Frustrations: What is preventing the persona from reaching their goals? What annoys them about this aspect of their life?

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Tasks: What types of activities must the persona do to reach their goals?

Ad-hoc persona

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The Brandi Tyler persona did not have any tasks.

What kind of tasks

do you think she would be completing?

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ACTIVITY: HARVARD EXTENSION WEBSITE USERS

Explore Your Opportunities at Harvard

DEGREES

UNDERGRADUATE DEGREES →
GRADUATE DEGREES →

CERTIFICATES

GRADUATE CERTIFICATES →

COURSES

COURSE CATALOG →

PREMEDICAL STUDIES

MEDICAL SCIENCES COURSES →
PREMEDICAL PROGRAM →

PROFESSIONAL DEVELOPMENT

NONCREDIT PROFESSIONAL DEVELOPMENT PROGRAMS →

LEARNING IN RETIREMENT

LEARN ABOUT THE PROGRAM →

GET MORE INFORMATION

Your Success, Our Mission

Harvard Extension School has been nurturing minds and advancing careers since 1910. We were founded on the radical idea of making a high-quality education accessible and affordable to many.

ABOUT HARVARD EXTENSION SCHOOL

From Graduation to Promotion

60% More than half of graduates seeking a promotion or new job opportunity received one within a year of graduation.

- Looking at site, identifying several audiences who might use it. Are all audiences served? Is there an audience that might be grown? Eliminated?
- Prioritize audiences. Do all audiences need to be served?
- Identify the goals of each audience. How do they line up with the goals you predicted in weeks 1 and 2?
- Consider organizational goals: in conflict or in harmony with user goals?
- Consider website goals: still make sense in light of these user goals?

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ETHNOGRAPHIC INTERVIEWS

Purpose of the interview

This talking is supposed to go somewhere

Why are you interviewing?

What information do you need to find out?

Explanations

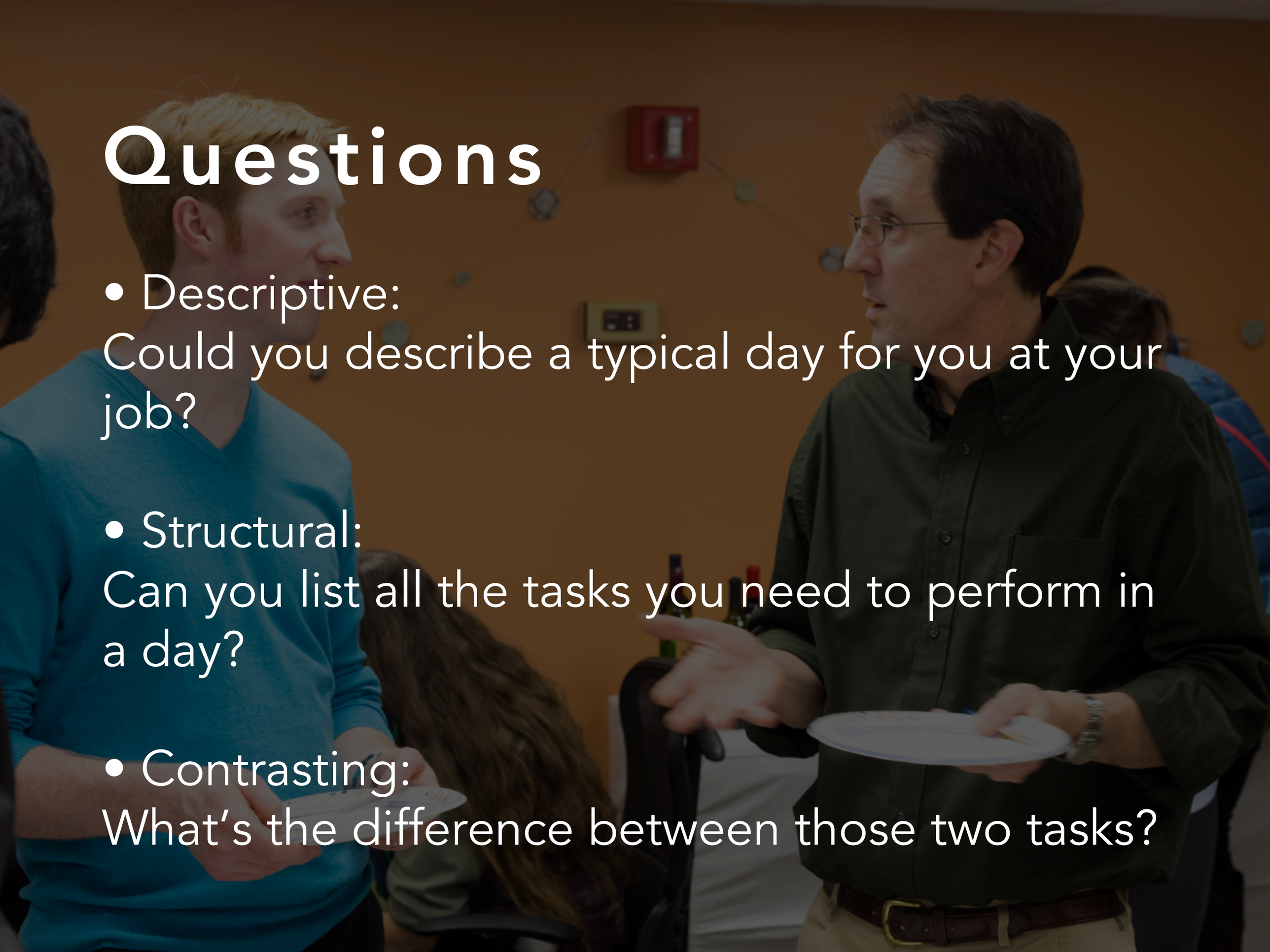
Project (aka purpose)

Recording

"Native" language (of the group - think Starbucks)

Interview (card sort, real-time task completion etc)

Question (different types etc)

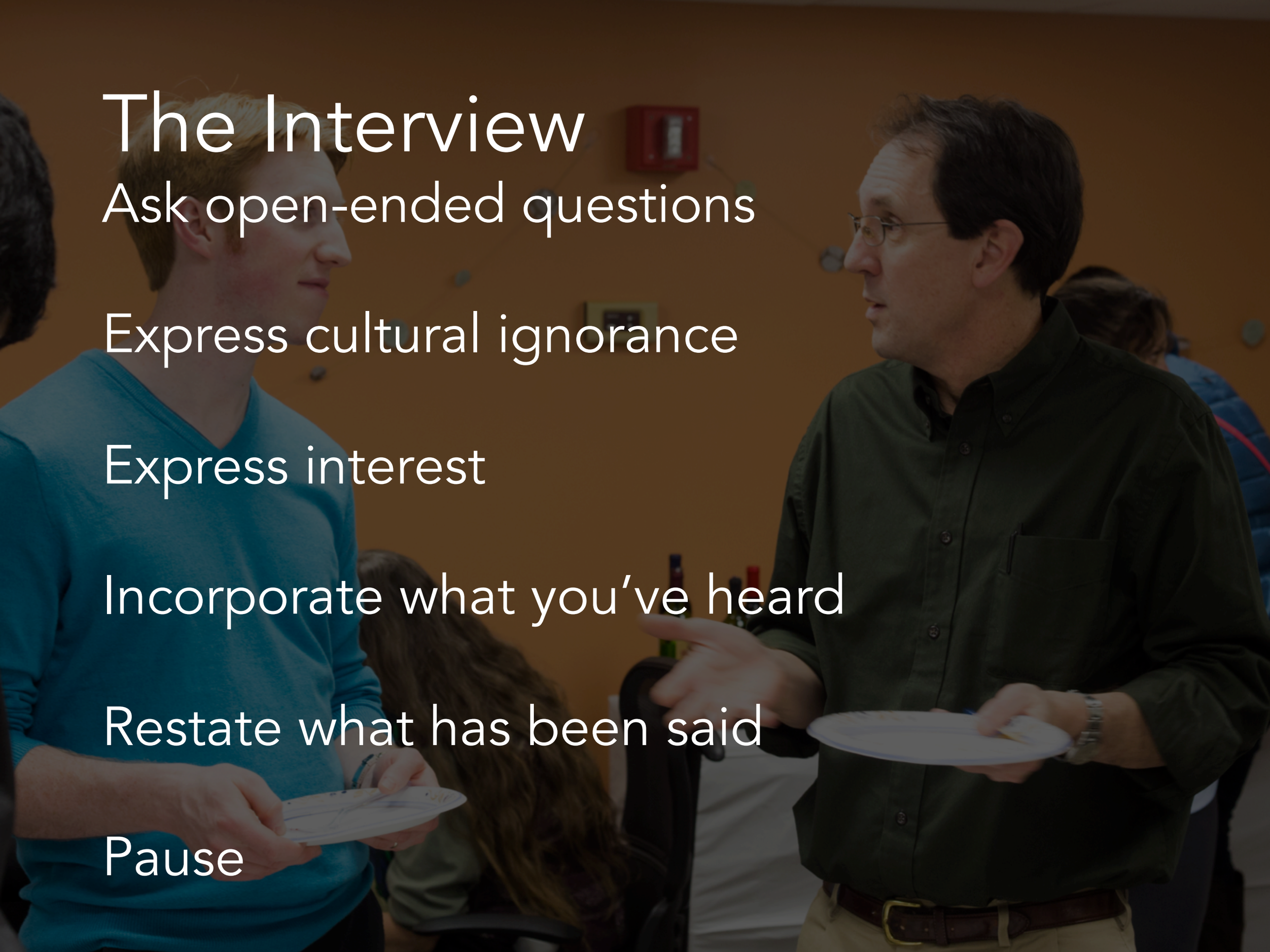


Questions

- Descriptive:
Could you describe a typical day for you at your job?

- Structural:
Can you list all the tasks you need to perform in a day?

- Contrasting:
What's the difference between those two tasks?



The Interview

Ask open-ended questions

Express cultural ignorance

Express interest

Incorporate what you've heard

Restate what has been said

Pause

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SURVEYS & QUESTIONNAIRES

- Multiple choice
- True/False
- Short answer
- Long answer/narrative

- What other colleges or education options are you considering?
- What are the top three factors that will influence your decision for a school?
- What is your goal in continuing your education?
- How soon do you plan to go back to school?
- Would you consider online courses? Why or why not?

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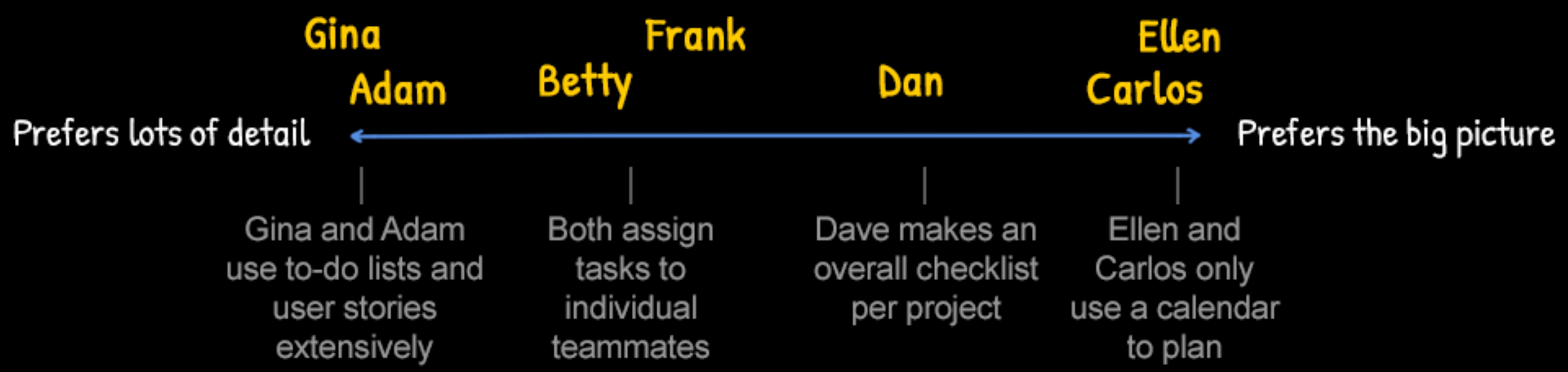
CREATING PERSONAS USING DATA

Identify variables for each role

Mostly behavioral, a few demographic

Younger	⟷	Older
Works with a small team	⟷	Works at an enterprise
Technically savvy	⟷	Not much technical knowledge
Prefers to be guided	⟷	Prefers to explore
Prefers lots of detail	⟷	Prefers the big picture
Likes to send emails	⟷	Prefers to talk in person
Does daily check-ins	⟷	Does weekly check-ins
Prefers to use pen & paper	⟷	Prefers to use Microsoft Excel

Map interviewees to variables



Primary reason for using a PM application:

Gina, Betty, Adam	Frank	Dan, Carlos, Ellen
Task management	Progress reports	Overall scheduling

Look for strong patterns (2 or more)

Each pattern is the basis for a persona

Pattern #1:

Works with a fairly small team
Technically savvy
Prefers a mix between guided & exploratory
Tends to prefer more detail
Does weekly check-ins

Pattern #2:

Works at an enterprise
Not so technically savvy
Prefers to be guided
Prefers the bigger picture
Does daily check-ins

Research-based persona

Paul Hayden

Narrative:

Paul works as a Product Manager for GloboTech's database management software app. He needs to keep on top of the current release cycle and the activities of his team of 3 designers and 14 developers. Every day, he logs into the company's PM tool to view alerts and review the upcoming calendar. When a milestone is approaching, he needs to check in often with the team members involved in that delivery.

Goals:

- Get releases done on schedule
- Support his team when they run into problems
- Be able to tell his supervisors how the project is going during weekly management team meetings

Frustrations:

- Having to learn new software is an annoyance
- It's often hard to find the lower-level features and details that his team members sometimes use inside the PM tool

Tasks:

- Review the project status every day
- Schedule delivery check-in meetings with relevant team members
- Download weekly reports on his team's resource usage

"I just want to see what's relevant to this week; I don't need to spend tons of time filling out a lot of detail for every little thing."

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CREATING AD-HOC PERSONAS FROM GROUP CONSENSUS

The Empathy Map

Researchers: _____

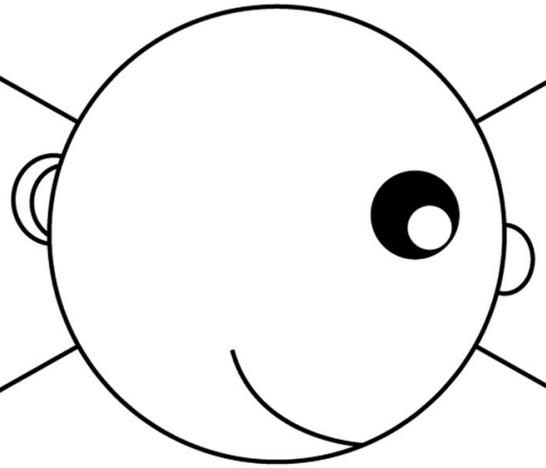
Version No.: _____

Date: _____

Perspective Client

What does the visitors
THINK & FEEL?

What does the visitors
HEAR?



What does the visitors
SEE?

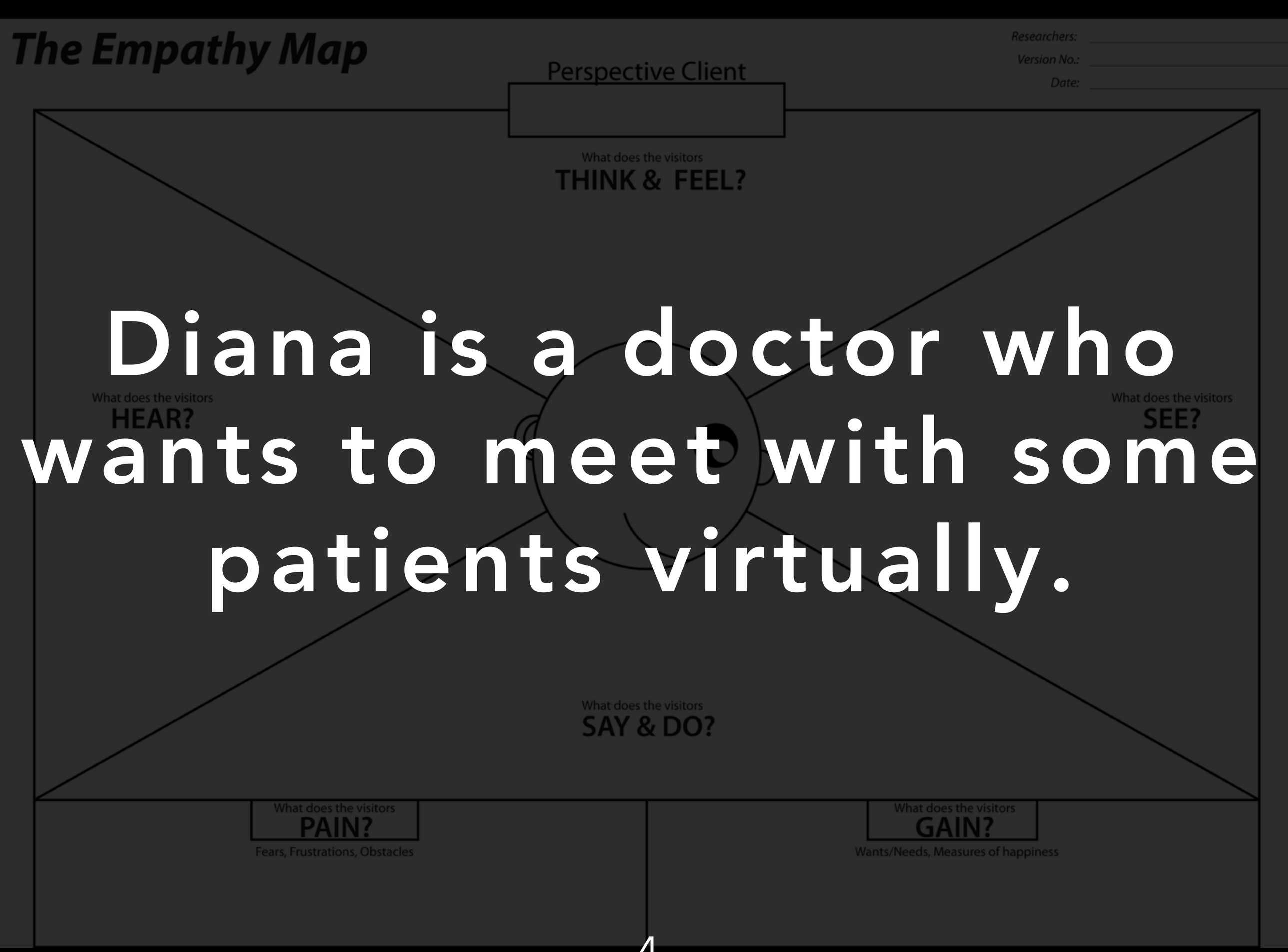
What does the visitors
SAY & DO?

What does the visitors
PAIN?

Fears, Frustrations, Obstacles

What does the visitors
GAIN?

Wants/Needs, Measures of happiness



Diana is a doctor who wants to meet with some patients virtually.

The Empathy Map

Researchers:
Version No.:
Date:

Perspective Client

Diana Lopez MD

What does the visitors
THINK & FEEL?

Frustrated at the current process

Ready to use tech to help

How can I maximize my time?

I don't want to waste time

Some patients don't need to come in every time

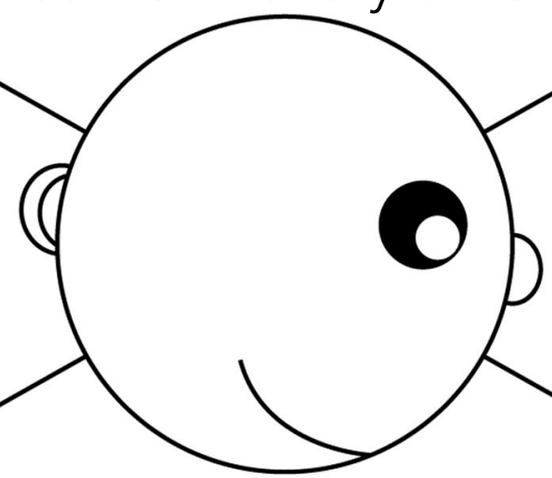
Full waiting rooms

What does the visitors
HEAR?

Receptionist upset about overfull doctor schedules

What does the visitors
SEE?

Her overworked colleagues



Too many patients who are fine and didn't need to come in

Patients complaining about scheduling follow-ups

Her phone and computer

What does the visitors
SAY & DO?

"Technology can make me more efficient"

There has to be a better way to follow up

Encourages patients to follow up by phone

What does the visitors
PAIN?
Fears, Frustrations, Obstacles

Getting enough adoption among her team to make it work.

What does the visitors
GAIN?
Wants/Needs, Measures of happiness

Save time, make lives of her patients easier

Ad-hoc persona

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