4 You are already a professional imaginer

5 This book is about building products for people

5 Why do we need personas?

11 Personas help make user-centered design possible

21 User representations are not new and we can learn a lot from the past

36 The next frontier for personas

37 Sounds great! Let's use personas! …it's easier said than done

42 This book is designed to fill in the gaps

45 Summary
Imagine all the people, sharing all the world.
You may say I’m a dreamer, but I’m not the only one...

— John Lennon, lyrics from Imagine

We would like to introduce you to Tanner, shown in Figure 1.1. Tanner is a nine-year-old boy who loves to skateboard, play video and computer games, and generally run wild — all of which he prefers to do instead of schoolwork. Tanner doesn’t sit still for long, and would rather spend time interactively on the PC than watch TV. Tanner’s mom is Laura, who likes to say that Tanner holds the record for most Band-Aids required for a single human being. Tanner is a pretty regular kid, except in two significant ways:

● Tanner is the most influential member of a product development team at a midsize software company.
● Tanner is imaginary.

This book is all about powerful imaginary people — personas — who can help you build products that real people actually like to use. Personas are detailed descriptions of imaginary people constructed out of well-understood, highly specified data about real people. We believe that when
you use data to create personas, and use personas in a thoughtful way during the product development process, you will:

- Increase your products' usability, utility, and general appeal
- Streamline your teams' processes and improve your colleagues' abilities to work together
- Enable your company to make business decisions that help both your company and your customers
- Improve your company's bottom line.

Tanner and personas like him are ready and willing to help you do all of this. All you have to do is bring them to life and give them jobs. This book is here to help you do that.

**FIGURE 1.1: Tanner.**

**YOU ARE ALREADY A PROFESSIONAL IMAGINER**

Whether you realize it or not, imagining people is already part of your job. If you picked up this book, you are probably paid to participate in the design and development of products for people — consumers, workers, and businesspeople of all sorts. You probably also know how difficult it is to understand who these people are: what they want out of your products, how they get things done, the contexts in which they work and live, and how they differ from you.

To build your products and build them well, you have had to become a professional imaginer, someone who builds a relatively concrete mental image of the people you imagine will be using your products. You can imagine things about people all day long, but it is difficult to know if the people you envision using your product bear any resemblance to the people who will actually purchase and use your product.

No matter what we are designing, building, or helping to build, we want our products (including software, hardware, consumer goods, and services) to be useful, appreciated, and profitable. We want to help create products quickly and cost effectively, but with the right set of features and good quality. We want these products to hit the market and instantly inspire demand, desire, and loyalty. We want people to use our products repeatedly and happily, encountering just the right functions at the right times and finding that the products grow with them as they develop expertise. We want our efforts to result in products that delight people, and to delight people we have to have some idea of who these people are and what they want.

In the best of all worlds, everyone working on a product would always be thinking of the needs of every person who will ever use the product. Real information about users would inform every decision and the resulting product would perfectly satisfy everyone who uses it. In practice in the real world, however, it is difficult to get everyone working on a product to think about users at all. To deliver on the promise and benefits of user-centered design
(UCD), we have to find creative ways of injecting accurate information about real users into the chaotic world of product development.

**THIS BOOK IS ABOUT BUILDING PRODUCTS FOR PEOPLE**

_Somehow, we must find again our sense of individual values, lost in this century of enormous technological advance. This very freedom that mechanical aids are giving us has welded us into unmanageable megalopolises, where people are anonymous numbers and where communication with our fellow man seems a minus quantity. We must restore the warmth and spirit we had in the smaller community. I hope that in our leisure time we will once again know our neighbor — and, if everyone knows his neighbor and learns to live with him, the entire world will be at peace._

—Henry Dreyfuss, *Designing for People*  
[Dreyfuss 1955, p. 261]

This book is intended for anyone who participates in designing and developing products for people. In particular, it is for those of us who think that understanding people and their environments is the first step in, and the ongoing challenge of, creating good products. The methods described in this book will help you turn data about your users into exemplars of the people who will use your product—into “personas.” Personas are clearly defined, memorable representations of users that remain conspicuous in the minds of those who design and build products.

This book addresses the “how” of creating and using personas to design products that people love. Our book doesn’t just describe the value of personas; it offers detailed techniques and tools related to conceiving, creating, communicating, and using personas to create great product designs. We provide rich examples, samples, and illustrations for persona practitioners to imitate and model. Perhaps most importantly, the book describes personas as a method complementing other UCD techniques, including user testing, scenario-based design, and cognitive walkthroughs.

**WHY DO WE NEED PERSONAS?**

It is a rare product indeed that does everything you want it to do in the way you want to do it. Why? Despite the fact that building products based on what real people need and want seems obvious, putting users (i.e., information about users) truly at the center of the design
and development process is extremely difficult. Why is it so difficult to be user centered? The problem is threefold.

First, being user centered is just not natural. Our more natural tendency is to be self-centered, which translates to taking an approach to product design based on our own wants and needs (at times even if we are not actually a user of the product). As Bruce Tognazzini points out, we sometimes even seek out users who are just like ourselves to provide feedback on our designs [Tognazzini 1995, p. 230]. Self-centered design is perhaps better than technology-centered design, but most of the time the people on your product development team are not representative of the target audience for your product. Self-centered design results in inadequate products.

The “forever-blinking” VCR clock is a classic example of self-centered design.

For almost as long as the average American has been alive, people have been driven nuts by the flashing “12:00” of their videocassette recorder’s clock. That flashing “12:00” has become a symbol of technology as tyranny, taunt, impotence, ignorance, intimidation, humiliation, stone in the shoe and pain in the butt. It stands for innovation created without humans in mind. Yet humans have grown to live with it. To expect it. To adjust themselves to the selfishness of these machines. Like sheep [Garreau 2001].

Most VCR designers include the clock-setting function in the menu of functions for the VCR because keeping all such functions grouped, and controlled by the same set of buttons and actions, makes sense to the programmer. Evidently, what makes sense to the programmers does not make sense to people who have, somehow, managed to set many other types of clocks. Because they are asked to do a familiar task in an unfamiliar and unnecessarily complex way, many VCR owners choose to live with the blinking “12:00.” For other examples of self-centered (and otherwise broken) designs, see Mark Hurst’s Web site at www.thisisbroken.com.

Second, users are complicated and varied. It takes great effort to understand their needs, desires, preferences, and behaviors. And unfortunately, it is sometimes the case that pleasing some users in a given situation necessarily conflicts with pleasing others.

Third, those doing the user and market research to understand who the users are and how they vary (and others who are just more in touch with your users, such as the sales team or the support team) are not typically the people who actually design and build the product. If the important information about users isn’t available at the right time, or is difficult to understand or to remember, product teams forge ahead with designing and
building features they think the users would like (or more likely, what is easiest and least costly to build). We need better methods that put users at the center of our product teams’ efforts.

**The word “user” isn’t very helpful**

When UCD was a new idea, simply introducing the word *user* in a design and development process was powerful: it challenged the status quo. Unfortunately, incorporating the word *user* in everyday corporate discourse is not enough to foster effective UCD.

Everyone (we hope) assumes that they are building products with users in mind. In most organizations, anyone asked about this would probably answer, “Yes, I think about the user a lot.” However, people who talk about the user are almost never asked to further define the term, and it is a sure bet that each person in the organization would describe “users” in a different way. If everyone in the organization does not have a clear and consistent understanding of who they are building the product for, the product is much more likely to fail. It is our contention that the word *user* cannot provide the clarity required. In fact, this is an underlying tenet of our book, as expressed in the following [McGovern 2002].

> “User” is a catchall and ultimately a mean-nothing word. It reflects a technology-centric, rather than a people-centric, view of the Web. To call someone a user is largely meaningless… The phrase “user-friendly” should never have had to be invented. It implies that technology is inherently hostile and that a new discipline — usability — had to be invented to make it friendlier. After all, we don’t refer to cars as “driver-friendly.” We don’t refer to bicycles as “cyclist-friendly.” We don’t refer to chairs as “bum-friendly.”

— Gerry McGovern, gerrymcgovern.com

We need to move beyond our habit of referring to “users” and find a better way to communicate about and focus on real people — the people we want using our products. Companies that produce consumer products must become user focused, in the sense that emergency rooms are “injury focused.” In an emergency room, it is not enough to convey that a person is injured. Doctors need to know the type of injury, the part of the body injured, the severity of the injury and its effect on vital statistics, and so on before they can identify the critical cases and decide on a course of treatment. Similarly, it is no longer enough to proclaim that something is being built for the user. We need much more information to make the difficult decisions that result in effective products.
When we try to understand users, we collect data

*It is necessary to know the class of people who will be using the system.... By knowing the users’ work experience, educational level, age, previous computer experience, and so on, it is possible to anticipate their learning difficulties to some extent and to better set appropriate limits for the complexity of the user interface...*

— J. Nielsen [Nielsen 1993, p. 74]

Companies routinely conduct many types of user and customer research. They identify likely users of planned products and attempt to make direct contact. They employ interviews, field studies, phone and Web surveys, focus groups, site visits, server log analyses, user testing, support call tracking, and beta program feedback. They collect photographs and artifacts, write up interview notes, perform task analyses, and document observations about the ways people approach and complete tasks.

What do people do after they collect a lot of data? They analyze it, extract information, and write reports — big, long reports. Such reports are full of incredibly useful information. Shouldn’t this be enough to establish a company-wide detailed understanding of users and their environments and activities?

**Raw data isn’t inherently useful, and neither are most reports**

What happens to voluminous reports in your organization? What do you do when given a rich, detailed report? Some of you skim through it, some read it carefully, and some toss it on a pile of other important documents. Reports on users (or customers) and their needs are not always seen as relevant, and even if they are, the reports themselves are often cumbersome, tedious, and difficult to apply in the day-to-day development process. Ironically, many of us create work products (such as reports on users, target customer analysis documents, and even user profiles) that are not very usable for our target customers — the members of our teams.

Whether or not data is examined and reports created and read, most people working on a product develop ideas about the product’s users. As the product development process continues, people throughout organizations make thousands of decisions related to product planning, design, technical development, and marketing, many of which are based on assumptions about users.

As often as not, even people who have read reports on users end up with an ongoing conception of the user based on a few facts and a loose set of assumptions, all tinted with personal experiences and biases. By the time our colleagues get around to shaping their conceptions of users, the reports that contain insights useful to this process have long been buried under
piles of specification documents, design plans, strategic messaging plans, and many other documents related to the product.

Of course, long reports are not the only way to communicate insights about users. Video clips, summary presentations, posters, and other artifacts can convey important data points. These artifacts are products unto themselves, requiring significant effort, creativity, skill, and thoughtful decision making. For example, Sleeswijk Visser et al. [2004] created a “personal cardset” containing illustrative diagrams, narrative, quotes, and photos to facilitate designer insights from user research (see Figure 1.2). The personal cardset (just one of the many design tools the authors have created for context-mapping research) was developed specifically as an aid to the members of a design team in working collaboratively with user data. They even designed using white space to allow designers to write or draw directly on the cards. But even with such rich artifacts to communicate user data, the lion’s share of user insights tends to get lost somewhere on the road to a finished product. Why does this happen?

Communicating insights about users is tricky. Insights regarding users suffer the same fate as messages we tried to pass to one another in the childhood game of Telephone. One person starts with what she believes is a clear message and whispers it to her neighbor. The neighbor whispers it to the next person in line, and so on. Inevitably the message, if it is passed on at all, is slowly altered in the process, so that the last person in line hears something radically different from the original message. The same thing happens to information about users as it is passed from person to person. The original message loses clarity, data and assumptions are mixed, and the result is a picture of the user built on random details that vary from person to person.

**Understanding your users is necessary, but not sufficient, for good design**

Methods for including user information in the design and development process, usually in the form of a “user requirements” section in a specification document, are not very effective (even though such documents are often very detailed and sophisticated). Design and specification documents are not necessarily adhered to. Tiny adjustments are made often — and understandably — as the product developers do their work. Thus, design and specification documents become inaccurate over time. Technologies change, time pressures mount, executives change their minds, the competitive landscape changes, a developer has a pet feature or technology she “just has to work on,” and even the “final” specification is slowly abandoned in the day-to-day reality of finishing the product.

Once we do understand the user, and even if we effectively communicate that understanding, we still have to tackle the difficult challenge of incorporating that information in the design of the product. Good designs help people achieve their goals and capitalize on the potential of the technology, and they are not easy to achieve. There is no tried-and-true method that
helps us make the leap from existing people, products, and problems to innovations that delight and make a profit.

Much of what we do as user-centered product designers is unsystematic. Our process seems more like alchemy than a structured and dependable methodology and, although there are principles on good interaction design, even the most educated and skilled designer often gets it wrong initially. Moreover, no product is ever built in a day. Even the best design is changed during implementation. Therefore, good designs tend to be those that have been evaluated (by both the product team and the intended users) and iteratively reworked many times according to a consistent and well-maintained vision.

No matter how much work we do to understand our users, we still encounter fairly predictable problems when trying to use data to design great products:

- It is difficult to identify and communicate the information that will help a product team understand its users.
- Even if user information is well communicated, it might not be interpreted consistently. How can you ensure that your team isn’t building products in a situation in which “the user” might be interpreted slightly differently by members of the team?
Once everyone on your team does have a consistent and shared understanding of the user, how do you use this to inform and direct your product design decisions? It is not easy to bridge the chasm between current user roles and tasks and the roles and tasks you want to support in a new way with a new system.

Once design decisions have been made, how should user information be used to evaluate the design and ensure effective implementation?

As we look to the future, UCD professionals are expanding our vision. Rather than simply creating user interfaces (UIs), we are working to create rich and complete user experiences. This ideal is more difficult to achieve than simply creating a usable package, and requires a greater focus on the part of product teams regarding the target audience of those experiences.

PERSONAS HELP MAKE USER-CENTERED DESIGN POSSIBLE

How do you get the people who are designing and making decisions about your product and those who are actually building it to embrace information about users? To take it a step further, how do you get them to empathize with user perspectives and take them as seriously as those elements that affect their own daily development jobs? You need a variety of tools to make this happen. This book offers one such tool that, although immensely popular and frequently discussed, until now has been only loosely described to practitioners. Enter personas.

Personas are fictitious, specific, concrete representations of target users. The notion of personas was created by Alan Cooper and popularized in his 1999 book The Inmates Are Running the Asylum: Why High Tech Products Drive Us Crazy and How To Restore The Sanity [Cooper 1999]. Personas put a face on the user — a memorable, engaging, and actionable image that serves as a design target. They convey information about users to your product team in ways that other artifacts cannot.

Personas will help you, your team, and your organization become more user focused. Consider the following story by Meg Hourihan regarding her discovery of and experience with personas.
Story from the field

TAKING THE “YOU” OUT OF USER: MY EXPERIENCE USING PERSONAS

—Meg Hourihan, cofounder and former Director of Development, Pyra

The Best-Laid Plans...
In 1999, I cofounded a small San Francisco–based start-up called Pyra. Our plan was to build a web-based project management tool and we chose to focus initially on Web development teams for our target audience since, as Web developers ourselves, we had intimate knowledge of the user group. We considered ourselves to be good all-around developers, competent in both interface and back-end development. We also assumed we were developing our product (called “Pyra” for lack of a better name at the time) for people just like us, so we could make assumptions based on our wants and extrapolate those desires for all users.

At this time, Microsoft had just released Internet Explorer 5 (IE 5) for Windows and we were anxious to use its improved standards support and DHTML in our application to make the interface as whiz-bang as possible. So we set to work building the coolest Web application we could, taking full advantage of the latest wizardry in IE 5 for Windows. Development was chugging along when Alan Cooper’s The Inmates Are Running the Asylum was released and I picked it up. When I got to the chapter discussing the use of personas, I was intrigued. Though I was confident in our approach, creating personas sounded like a useful exercise and a way to confirm we were on track.

Discovering Personas
Cooper’s personas are simply pretend users of the system you’re building. You describe them, in a surprising amount of detail, and then design your system for them. Since you can’t build everything for every persona (and you wouldn’t want to), the establishment of a primary persona is critical in focusing the team’s efforts effectively. In our case, the development of personas helped us recognize that the target audience we’d chosen, Web development teams, wasn’t as homogenous as we first assumed. Not everyone who’s involved in Web development is gaga for DHTML or CSS — some people on the team might not even know what those acronyms stand for, a simple fact we’d failed to consider up until this point.

Our team stopped working to discuss personas and we agreed it sounded important enough to devote some time to it. As we sketched out our various personas (a project manager for a large company whose corporate standard was Netscape 3, a Web designer who worked on a Mac, an independent consultant who worked from home), it became apparent we had made some bad assumptions. Not only were the personas not all like us — our personas wouldn’t even be able to use the system we were building for them! We’d been so blinded by our own self-interest we failed to realize we were building a useless team product. We were cutting ourselves off from the people who would most likely make the decision to use the tool — and no project team would sign up for Pyra because an entire project team couldn’t use it.
We were a month away from releasing the beta version of Pyra at this point, but we knew what needed to happen. We had to go back and redo our application to work for Netscape and IE, for Windows and Macintosh, and in doing so we needed to reevaluate our tool using our personas (specifically our primary persona) rather than ourselves or the mythical “user” to guide our decisions. So that’s what we did, pulling out all our beloved DHTML and remote scripting so that our 37-year-old project manager persona could access the application from her home office in Seattle on a Saturday afternoon. Though the rework delayed our beta release by two months, it resulted in a tool our potential customers could use immediately.

**Learning Hard Lessons**

Through the process of developing personas, the mistakes we’d made became clear to us:

**Mistake 1: We chose flashy technology over broad access.**

We allowed the geeky part of our personalities, with its lust for the newest and greatest ways of doing things, to overwhelm the decision-making process. Though there was a sense at the beginning that we needed to support other platforms, we let our desire to use the newest “toys” change the priority of doing so. This is a common mistake programmers and engineers make but one which can be avoided through the use of personas. Interestingly, when we redid Pyra based on our personas’ needs we didn’t lose any of the previous functionality—we only changed how it was done (e.g., reverting to less elegant page reloads rather than DHTML client-side changes). The previous version had only been impressive to fellow geeks like ourselves, but we hadn’t realized that. More importantly, the essential features of the tool were never lost; by redoing the product, we made those features available to many more people.

**Mistake 2: We assumed users would be more impressed by a robust interface they couldn’t use than by a less elegant application they could use.**

Again, our technical hubris blinded us into thinking that potential customers would be impressed by how we built our functionality, not by what the underlying features were. We let our wants come between our product and our users.

**Mistake 3: We thought we were the primary persona.**

While we shared common goals with some of our personas, and though one of the personas we developed was very similar to the members of our team, none of us was the primary persona. Defining a primary persona prevented us from releasing our original tool with its issues around broad access.
(Story from the field, continued)

Less than a month after the beta release of Pyra, we released a second tool, Blogger. Though we didn’t create formal personas for Blogger users, the experience we gained by using personas infused our company’s approach to building Web applications. Any time the word user was mentioned, questions flew: “What user? Who is she and what’s she trying to do?” Our work with personas increased our awareness of our audience and their varying skill levels and goals when using the application. The use of personas helped move all our discussions about the application, not only those related to the interface, away from the realm of vagaries and into tangible, actionable items (e.g., “It should be easy to create a new blog.” “Easy? Easy for whom?” “It should take less than a minute to get started.”). We developed a system of familiar, conversational personas on the fly, focusing on the primary persona without going through the formal process.

In retrospect, some of this sounds like common sense, and yet time and time again I find myself looking at an interface and making assumptions based on how I’d like it to work. Like a recovering substance abuser, it’s a constant challenge for me to refrain — I can always imagine that I’m the user. I’ve carried the lessons I’ve learned through their development with me for the past three years to other projects and engagements. The use of personas resulted in a fundamental shift in the way I approach not only interface design but application architecture as a whole.

As Meg Hourihan’s story illustrates, personas have many benefits:

- Personas make assumptions and knowledge about users explicit, creating a common language with which to talk about users meaningfully.
- Personas allow you to focus on and design for a small set of specific users (who are not necessarily like you), helping you make better decisions.
- Personas engender interest and empathy toward users, engaging your team in a way that other representations of user data cannot.

Let’s examine each of these benefits in more detail.

**Personas make assumptions about users explicit**

You have likely heard people in your company say things like “Our customers would never buy that,” or “Users won’t understand that.” Everyone you work with carries assumptions about their customers or users. These assumptions — inevitably full of personal, cultural, or corporate bias — remain individually held, often completely hidden from colleagues, and perhaps even unknown to the people holding them. Whether or not you surface these assumptions, they will affect the design and success of your products.
Simply surfacing assumptions and agreeing on a single set of them can enhance communication and help a team build a better product. However, there is no substitute for data. Our first goal as product designers should be to build a shared, data-driven, well-communicated vision of the user to focus the efforts of the product team.

Personas humanize vast and disparate data sources by capitalizing on our ability to remember details about individual people. In so doing, they provide a usable alternative to referring to the nebulous “user.” In other words, personas do the job of creating a concrete, focused, and stable definition of your audience.

**Story from the field**

**PERSONAS HIGHLIGHT DIFFERENCES IN ASSUMPTIONS**

—Bob Murata, Katja Rimmi, and Sheryl Ehrlich, Adobe Systems

A few years ago, when personas were first coming into vogue, many of the designers on the User Interface Team at Adobe started to generate user profiles and personas to drive discussion with their product team members.

However, as more and more profiles and personas were created it became increasingly evident that there were subtle differences in how the various product teams viewed their core customer bases. For instance, although Photoshop and Illustrator had both created a “Graphic Designer” user profile, the descriptions of the work done by such a user differed between the two teams. Interestingly, about this same time Adobe made a strategic shift to concentrate on creating an integrated suite of products for the “Creative Professional,” instead of focusing on individual products. For this strategy to work, it was critical that the product teams share a common understanding of their target customers, so that they could develop the right cross-product workflows. The creation of user profiles and personas helped surface differing assumptions that would have otherwise gone undetected. Those user profiles and personas then served as a basis for discussing which cross-product features and workflow should be pursued and developed.

Simply surfacing assumptions and agreeing on a single set of them can enhance communication and help a team build a better product. However, there is no substitute for data. Our first goal as product designers should be to build a shared, data-driven, well-communicated vision of the user to focus the efforts of the product team.

Personas humanize vast and disparate data sources by capitalizing on our ability to remember details about individual people. In so doing, they provide a usable alternative to referring to the nebulous “user.” In other words, personas do the job of creating a concrete, focused, and stable definition of your audience.

**Personas place the focus on specific users rather than on “everyone”**

Although personas have generated a lot of buzz in the product design community in recent years, and techniques of using abstract representations of users have been around for quite a while, the idea of designing products for a small set of concretely defined users is still a fairly new — and radical — idea for most of us. After all, most of us have a difficult time defining our broad target markets in the first place. We are convinced that we have to build products that will solve problems for, and appeal to, as many customers as possible, so that our products sell well and stay competitive.
We work in a world in which technology changes at an unbelievably fast rate and processing power increases dramatically almost every year. We are used to building products that undergo a process of version development, wherein subsequent versions add features to match those of our competitors, to take advantage of increased technical capacity and to meet the requirements of our customer bases. We live in a corporate culture of “more is more” and tend to build products accordingly. The definition of any target audience tends to be the all-encompassing “everyone.”

Story from the field

BUILDING A BUSINESS ON CUSTOMERS’ GOALS
—Ken Seiff, Founder of Bluefly.com and CEO, Glowcast Ventures.

When I first heard about the concept of personas, a light bulb went off. It was so brilliantly obvious. By designing our business to address our customers’ goals, we directly increase customer satisfaction, which, in turn, directly impacts three main drivers of profit: a customer’s likelihood to purchase, their likelihood to visit in the future, and their likelihood to recommend our business to a friend. There couldn’t possibly be a simpler, more powerful idea upon which to build a business.

In limiting our choices, personas help us make better decisions

In *The Inmates Are Running the Asylum*, Alan Cooper states, “To create a product that must satisfy a broad audience of users...you will have far greater success by designing for one single person” [Cooper 1999, p. 124]. The idea of building a product with a single user, or a small selection of users, in mind seems to completely contradict the mind-set of our industry. At face value, it seems to suggest that if you limit the features and functions of the product you design to those that will satisfy just a few very specific people you will somehow build a successful product.

At first, most balk at this idea because it seems unnecessarily restrictive and dangerous. The thought of limiting our product designs to satisfy just a few people is terrifying. What if only those few people we design for purchase our product? Worse, what if we choose the wrong people to design for? Isn’t it safer to design a product that the greatest potential number of people will like?

In his book *The Paradox of Choice: Why More Is Less*, Barry Schwartz asserts that having excessive choices can make people feel more trapped, less happy, and less able to make good decisions than they would if they had fewer options [Schwartz 2004]. His argument has some interesting implications for the world of product design and may explain why personas, which embody a constrained set of user characteristics and enable (or even force) us to eliminate many choices, can free us to make better decisions and therefore better products.
At the start of a product development cycle, there are typically a lot of ideas for features and someone (or a group of people) has to decide which features are worth developing. Most companies realize that building every possible feature is not an option due to limited resources and, more importantly, the understanding that trying to build every possible feature tends to result in products that satisfy no one. Every time we start a new project we are faced with trade-offs, and “being forced to confront trade-offs in making decisions makes people unhappy and indecisive” [Schwartz 2004, p. 125].

Schwartz describes findings of research studies in which people were forced to make trade-offs similar to those we have to make when designing products. The research found that in being forced to make trade-offs we face the stress of selecting wrongly, the regret of possible missed opportunities, and a natural aversion to loss. For example, Schwartz argues that at some level stakeholders feel that every feature they decide not to build could be the reason the product fails (and no one wants to have been the one to have established a low priority for that key feature). When the stakes are high and mistakes are perceived as costly, research finds that the tendency is to avoid making any decision. If a stakeholder avoids making the decision

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**Story from the field**

**CUSTOMER FOCUS CHANGES THE GAME**

—Brian Schlosser, Chief Executive Officer, Attenex Corporation

Competitors lurk at every turn ready to steal the revenue that I need to keep my engineering department in Krispy Kremes and lattes. No matter what new feature my company develops, competitors will tell innocent prospects that they already have it or it will come out in the next release. Then they claim that their new innovations will make our software obsolete. There is no way that my team can outrun their unscrupulous marketers. Feature wars could kill the company.

One way to respond is to change the game. Because the competition can always respond to features, we find it useful to market the things that make our company unique. Attenex invests a significant portion of its budget in the development of personas, Maps, and other tools to create a superior user experience. [For more details on “Maps,” see Chapter 10: “Reality and Design Maps.”] Our user experience group is focused on matching our mature persona’s needs with each specification before any code is written. Our understanding of the customer is a competitive advantage that others can’t fake.

Competitors who readily claim to have any feature or capability that we release are often flummoxed when called on to explain the process that their company uses to achieve user delight. For Attenex, one key to our success is to do more than talk about what we make; we focus on who we make our products for.
of which features not to build, the result is feature creep and a product that in trying to appeal to everyone satisfies few.

In his final chapter, Schwartz encourages us to “learn to love constraints” because “choice within constraints, freedom within limits, is what enables [us] to imagine a host of marvelous possibilities” [Schwartz 2004, pp. 235–236]. Personas are helpful because they are constraining. Personas clearly define who is and who is not the target user (or customer) for the product and thereby make some of the decisions for us. For example, if the primary persona for a product doesn’t have broadband access we have no choice: we cannot create a design that requires broadband. Every detail we include in our personas limits the number of choices we have to make. Personas define a tight domain within which the product needs to perform. Within that domain, personas free us to explore all of the “marvelous possibilities” for the product we are designing.

From the very beginning of a product development cycle, personas can be there to provide data in the form of the “voice” of the user, which can reduce feature debates and refocus projects. In this regard, personas offer a consistent target-audience vision. Perhaps this is why, paradoxically, designing for just a few well-defined personas increases the likelihood that many people will love your product.

**Personas engage the product design and development team**

Of course, you could likely obtain the benefits mentioned to this point by invoking other UCD techniques and by using representations of users other than personas. So, what is the overriding benefit of personas compared to similar techniques? We believe it lies in the way personas can engage your team.

Personas are fun. Just like characters in books, TV shows, and movies, personas evoke empathy and inspire the imagination. People on a product development team can relate to personas and become active participants in bringing the personas “to life.” We have witnessed team members becoming attached to personas.

As comically illustrated in Figure 1.3, we have seen product teams treat personas as real people, arguing with conviction on the persona’s behalf and sometimes even expressing a sense of sorrow when a persona is retired from duty upon release of a product. This happens in part because personas are detailed, specific, and personal. When created from meaningful data, they have a credibility other representations lack.

We provide several case studies throughout the book that discuss this characteristic of engagement. In one of the contributed chapters later in this book (“Why Personas Work”), Jonathan Grudin provides an interesting discussion regarding why personas have this power and
provides insight on how to exploit it. For our purposes here, suffice it to say that personas can help your product team become user focused in an intense, compelling, memorable, and fun fashion. If personas are created with rigor (i.e., utilizing rich data and a systematic process), the resultant user focus is deep and meaningful, educating your broad team with relevant information about their most important users. For product teams new to UCD, personas can pave the way for other highly beneficial (albeit more costly) methods such as iterative user testing and longitudinal ethnographic research.

**Story from the field**

**PERSONAS ARE ESSENTIAL TO EFFECTIVE DESIGN**

—Harley Manning, Forrester Research

As a leading industry analyst, Forrester Research has the unique opportunity to look at the business practices across hundreds of companies. From this perspective, we know that successful design efforts have resulted from the adoption of a disciplined approach called “scenario design.” The premise of scenario design is simple: No Web site, IVR system, kiosk, or software application is inherently good or bad; it can only be judged in terms of how well it supports the goals of its intended users. This seems simple (and maybe even obvious),
but sadly it is not. That’s because many of the firms we study know little about their users and user goals that are useful to a designer. Most firms rely on simple customer profiles based on traditional market research to provide user data. But we’ve found that personas, informed by qualitative research, are a much more useful representation to guide design, particularly when used in conjunction with scenarios.

For example, a typical customer profile at an auto manufacturer might tell you that a prospect is 25 years of age, lives in Chicago, earns $50,000 a year, and is buying her first new car. But it doesn’t tell you where she starts her buying process: by talking with friends, reading a consumer magazine, or conducting research online at either a consumer site or a manufacturer site. It also doesn’t tell you the information most important to her purchasing decision (price? safety? style? gas mileage?), how she will choose a dealer (proximity? reputation?), or whether her overarching goal is to feel good about her decision or simply tick a chore off her list.

Lacking this information, businesses make bad design choices and often have difficulty making any decisions at all. Ford.com is a case in point. That Web site is the corporate portal to all Ford brands, including Ford vehicles, Volvo, and Jaguar. As a result, the site managers have a “steering committee” of almost 100 stakeholders from the individual brand sites that get traffic from the portal. Prior to adopting the practice of personas, even a simple decision could bog down in conflicting agendas. But now the design team uses three personas that represent all new car buyers to create a common view of the customer and win quick approval from the various divisions.

Personas don’t just help industries selling high-consideration products, either. The manager of the corporate Web site at a giant consumer-packaged-goods manufacturer told us that she floated over 20 design proposals that were rejected because internal stakeholders couldn’t agree. Within days of creating personas, she finally won approval for a design and is very happy with the business results the design produced.

Personas can create cross-company buy-in on who the most important customer segments are and what they want and need, which in turn provides an instant litmus test for whether you are making good design decisions or bad ones. These examples illustrate why creating a shared understanding of customers and their goals by embracing personas is the thing to do if you do nothing else.
USER REPRESENTATIONS ARE NOT NEW AND WE CAN LEARN A LOT FROM THE PAST

Joe and Josephine are austere line drawings of a man and a woman, and they occupy places of honor on the walls of our New York and California offices…. They are part of our staff, representing the millions of consumers for whom we are designing, and they dictate every line we draw. Joe and Josephine did not spring lightly to our walls from the pages of a book on anatomy. They represent many years of research by our office, not merely into their physical aspects but into their psychology as well.


Industrial designer Henry Dreyfuss calls Joe and Josephine the “heroes” of his book Designing for People. Dreyfuss is only one of many who have created representations of users to inform the efforts of product development. Over the years, several methodologies have arisen for consolidating, communicating, and employing user data and information developed via user representations. We believe it is worthwhile to understand and borrow from these representation techniques. Throughout this book we expand on many of the ideas laid out by the pioneers discussed here. The following pages provide a brief chronology and description of the history of user representations in product design.

Representations of users in marketing and branding

Although this book focuses primarily on personae as effective user representations for product design, there is considerable precedent for user representations in marketing and branding.

Sissors’ and Weinstein’s market definitions

The basic idea of defining a market dates back at least to the 1960s. Although not the first to deal with the topic, Jack Sissors’ 1966 article “What Is a Market” is a classic that helped introduce the concept of user representations to the world of business [Sissors 1966]. Sissors discussed how important it is to define who you are trying to sell to if you want to have a successful product. Many practitioners have built on this foundation to create increasingly specific representations of target customers. In his 1998 book Defining Your Market: Winning Strategies for High-tech, Industrial, and Service Firms, Art Weinstein describes a detailed approach to identifying and using market definitions for product marketing and business

1. Identify the relevant market.
2. Create the defined market.
3. Specify the target market.

Weinstein’s “defined markets” in step 2 consist of a series of specific market types (e.g., penetrated versus untapped) that remain impersonal and abstract in form. They refer to groups of customers but do not describe any personal attributes of the individuals who comprise each market. For example, if a certified public accounting (CPA) consulting company were to explore various markets relevant to their products and services, they might do so as outlined in Figure 1.4.

The argument is that the clearer the definition of the market, the easier it is to target the market with specific messages and value propositions. Note in Figure 1.4, however, that the markets are defined in terms of common characteristics shared by companies, not individuals. Those of us accustomed to working on products that have user interfaces are more familiar with market segments defined in terms of common characteristics of people. A more recognizable representation of target markets is evident in the following examples:

- Single moms between the ages of 25 and 45 who have full-time jobs, earn more than $30,000 annually, and do not enjoy cooking or have time for it
- Retired professionals in metropolitan areas who are interested in traveling and whose children have left the home
- 18- to 24-year-old college students who love music and own a cell phone.

As shown in Figure 1.5, such market segments can be defined along a variety of dimensions.
Market segments are representations of groups of users, and such representations can be defined in meticulous detail. However, they do not typically describe specific goals and needs of individuals in a cohesive “whole-person” format. (For a further discussion of this, see the sidebar “Customer Segmentation and Design Personas: What’s the Difference?” by Frank Spillers, later in this chapter.) Interestingly, Weinstein notes that customer needs are the most important market definition characteristic for organizations (twice as important as any other single factor).

We see Weinstein’s approach (and those like it) as providing a basic foundation for market research and strategic customer definition that is useful, if not critical, in creating personas. In chapter 3, we recommend that you take advantage of familiar terms used to describe your company’s users when you create and communicate your personas. If your company has invested in market segmentation, these familiar terms might be the names of the segments. As you will see, you can use the segment names, descriptions, and source data to help you create personas that resonate for your organization.

Moore’s “target customer characterizations”

In his book Crossing the Chasm, Geoffrey Moore discussed “target customer characterizations” [Moore 1991]. Moore’s thesis started with the need for “informed intuition” as opposed to “analytical reason” as the most trustworthy decision tool for the job of targeting specific markets.

Moore argues that market-segment definitions such as “yuppies versus teenyboppers” or “laggards versus early adopters” are too impersonal and abstract. He claims that images of customers, not markets, are the key. According to Moore, “Target Customer Characterization is a
formal process for making up these images, getting them out of individual heads and in front of a marketing decision-making group” [Moore 1991, p. 95]. They provide “…something that gives more clues about how to proceed…then, once we have their images in mind, we can let them guide us to developing a truly responsive approach to their needs” [Moore 1991, p. 95].

Moore proposed that one should initially create 20 to 50 of such characterizations and then narrow them down to 8 to 10 distinct alternatives. Each characterization incorporates the following five aspects:

1. **Personal profile and job description**
   Jerome is a 32 year old account executive with Splashi & Splashi, a leading sportswear manufacturer, located in La Jolla, California. He is responsible for placing their new line of Plastique swimwear in sporting goods stores and upscale boutiques, and his territory is northern California. The line is very pricey, and Jerome wants to maintain an upscale, professional image… [Moore 1991, p. 96].

2. **Technical resources**
   Jerome himself has never used a personal computer, but he works in an office that is equipped with several IBM PCs, which are connected to the main computer at the head office. The PCs are equipped with modems and printers [Moore 1991, p. 97].

3. **A “day in the life” dramatization before the introduction of the proposed product**
   Jerome is in the midst of taking an order for the basic line of Plastique swimwear at the Ghirardelli Square Windsurf and Kite Store. He notices that the other sportswear on display features a lot of fluorescent colors. Plastique is coming out with a new line of fluorescent wear, but Jerome… [Moore 1991, pp. 97–98].

4. **Problem or dilemma that motivates the purchase of the proposed product**
   To sell the maximum amount of high-margin product line, Jerome must maintain a highly professional image and be able to reference large amounts of detailed information at a moment’s notice. Jerome’s inability to do this more efficiently is costing his company sales… [Moore 1991, p. 98].

5. **A “day in the life” after the introduction of the product**
   Having noticed the interest in fluorescent colors, Jerome touches the button on the screen of his pen-based laptop that says “reference materials.” This calls up a display of several icons, and he selects “new products” [Moore 1991, pp. 98–99].

Moore further describes a system of employing these characterizations toward product definition and marketing. Note that Moore’s characterizations do not include photos or other images, nor do they attempt to describe the person much outside the relevant setting. However, Moore’s work does bring us one giant step closer to the idea of personas. While market segments are intended to capture the range of demographics, psychographics, and technographics common to a group of customers, Moore’s Target Customer characterizations begin to explore the value of deeply understanding individual customers in the context of their work environment.
Upshaw’s customer “indivisualization”

A few years later, but apparently independently, Lynn Upshaw — in his 1995 book Building Brand Identity: a Strategy for Success in a Hostile Marketplace — described a similar notion that he called “indivisualizing the customer.” “Indivisualizing is the discipline of continuously visualizing the customer or prospect as an individual rather than as part of a mass population, group, or segment,” writes Upshaw [Upshaw 1995, p. 97]. Like Moore’s characterizations, the purpose of these profiles is to inform and inspire decision making. “The act of indivisualizing itself encourages marketers to create a living, fluid visualization of their individual customers that keeps their personal perspectives uppermost in mind” [Upshaw 1995, p. 98].

Upshaw makes a distinction between descriptive profiles and indivisualized profiles. Descriptive profiles include data that describes the customer as seen by others (i.e., primarily your product or marketing team). Indivisualized profiles portray individuals, within the context of a purchase decision, as they see themselves:

*Descriptive Profile* — “Middle/upper-middle income, married, children in high school or college, suburban, some discretionary investments” [Upshaw 1995, p. 101].

*Indivisualized Profile* (abridged) — “I’m Alice. I’m feeling the burden of my responsibilities more than ever. I don’t want to waste money on commissions for advice I’ll just end up having doubts about. Schwab is run the way I would run a brokerage” [Upshaw 1995, p. 101].

Upshaw’s indivisualized customer profiles consist of many paragraphs of first-person text (perhaps several pages) and include a photo. They provide a more general view of the daily life of the target customer than the dilemma-focused before/after characterizations of Moore. Upshaw provides a much tighter and more detailed description than Moore of their creation, which is data oriented, as well as of the process of using them.

Mello’s customer image statements

More recently, Sheila Mello — in her 2002 book Customer-centric Product Definition — describes a process for understanding users’ needs and desires, which is used ultimately for product definition [Mello 2002]. Her book highlights the need for companies to have a clear “Image” of the customer. Mello states that such an image typically does not emerge on its own, despite investments in customer and market research. She provides a method for deriving image statements that answers questions such as the following:

- What is the customer’s life like?
- What challenges the customer?
- What motivates the customer?
Although this sounds promising and seems similar to other representations, these images are typically limited to a single sentence describing some essential characteristic of the customer and are meant, according to Mello, to “conjure up a concrete picture of the customer’s surroundings.” Statements of customer desire and suggestions for solutions do not belong in image statements. For example, the following is an image statement: “I have to get my reading glasses to read the numbers on the remote.” The following, however, are not image statements [Mello 2002, p. 80]:

- “I want a system that fits in my suit pocket” (statement of customer desire).
- “I’d like it to make all the adjustments automatically” (customer has suggested a feature).
- “I would like it to weigh less than two pounds and easily fit in my briefcase” (customer has suggested a solution).

Notably, all of these statements are derived directly from customer research, and although useful at a high level, none (even taken together) provides the depth and richness required to truly define a product in all of its complexities. Toward this end, Mello’s method involves the extraction of hundreds (if not thousands) of such image statements, reduction of these to the key subset of 20 to 30, and then the organization of them into a format that facilitates deep understanding of what it is like to be a customer. The end result is an “image diagram” (as shown in Figure 1.6) that represents the relationships between image statements both hierarchically and linearly to show common threads (shared concepts) as well as cause and effect. Mello’s approach includes the translation of these images into specific, actionable requirements for the product.

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**FIGURE 1.6: Image diagram for a home theater system. (Adapted from Mello [2002, p. 85].)**
Mello’s work begins to bridge the gap between marketing and product design, while market segments and target customer characterizations are intended to help build strategies for marketing and sales, Mello’s Image Diagrams are built to help designers create desirable products.

**Representations of users in usability and interaction design**

Designers have long used scenarios and their close relative storyboards to organize, justify, and communicate ideas. More recently, however (dating to the mid 1980s), usability specialists began to use scenarios as aids to system design, product development, and research in human/computer interaction.

**Carroll’s scenarios**

At their core, scenarios are simply stories. They have a setting, actors or agents who have goals or objectives and a plot or sequence of actions and events. John Carroll, a longstanding proponent of scenarios, argues that scenarios can help designers and analysts focus on assumptions about people and tasks — assumptions that are implicit in the software [Carroll 1995]. Scenarios can encourage reflection during design. They are concrete yet flexible, and are easily revised and extended. They can be viewed from multiple perspectives, and can be abstracted and categorized.

Scenarios tend not to focus on users. Scenarios are overviews of entire networks of actions and reactions. Each scenario describes many parts in motion, including the actor, the system, the context, and the specific actions or dialog associated with both actor and system. Scenarios do not depend on the actors that perform in them. The actors are treated as simply another component of the system. For example, the following are examples of scenarios that might have been written at different times for a single project:

**Scenario 1** — Harry, a curriculum designer, has just joined a project developing a multimedia information system for engineering education. He browses the project video history. Sets of clips are categorized under major iconically presented headings; under some of these are further menu-driven subcategories.

**Scenario 2** — He selects the Lewis icon from the designers, the Vision icon from the issues, and an early point on the project timeline. He then selects Play Clip and views a brief scene in which Lewis describes his vision of the project… [Carroll 1995, p. 4]

Interestingly, the extensive literature on scenario-based design offers little discussion of the agents and actors incorporated in such scenarios (the concept of “actor” was introduced by Ivar Jacobson as part of the use-case approach [Jacobson 1992; see also 1995]). After reviewing many of the available books, chapters, and articles on scenario-based design, we found that none provides more than a paragraph or two focused on the procedures for using actors
and agents in scenarios. Although seemingly central to the paradigm, little is said about the act of defining an agent or how to use one appropriately once defined.

Mikkelsen and Lee argue that most scenario-based design suffers from the lack of a clear and usable representation of the user [Mikkelsen and Lee 2000]. They note that, although the scenarios provide specificity in capturing user context and tasks, the author often assumes that the reader knows who the user is and the relevant detail about the user. As such, they leave out critical details about the user regarding motivation, previous actions or events, and preferences — as well as other less critical but perhaps more engaging details that promote insight, credibility, interest, and empathy. Thus, contrary to Carroll’s evaluation, scenarios tend to be static and non-generative (i.e., difficult to extend and reuse).

In Chapter 6, we provide recommendations for using personas to enrich scenarios and improve scenario-based design processes.

**Hackos and Redish’s user profiles**

User profiles are a UCD technique that arose from the need to analyze and consolidate rich information about users gained from interviews, site visits, and similar (more qualitative) forms of user research. The technique has been applied to usability engineering since the early 1980s, although the degree of rigor in definition and application of the concept varies somewhat across the discipline (e.g., see Boyle and Clarke [1985], Cushman and Derounian [1988], Gould and Lewis [1985], Mayhew [1992] and [1999], and Nielsen [1992]).

In their book *User and Task Analysis for Interface Design*, Hackos and Redish describe the concept of user profiles and provide a detailed methodology for generating and using them [Hackos and Redish 1998]. User profiles are detailed representations of users refined to the point of unique types or classes of users. User profiles tend to be accurate and terse summaries of the data from which they are derived. Typically, they do not tell stories about experiences nor contain fictional components added for the sake of engagement and realism. In some cases, they can actually be devoid of personality, describing only an abstract set of characteristics. Hackos and Redish describe list-based user profiles (see Figure 1.7) and more personal forms of profiles, which include narratives (see Figure 1.8) and illustrations (posters with images).

These representations are only a small part of Hackos and Redish’s larger practical guide on planning, analyzing, and using field research. They have not taken the idea to the extreme of

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**Handy Detail**

**DON’T GET US WRONG, WE LOVE SCENARIOS!**

Don’t let this discussion of scenarios give you the wrong idea. We believe that scenarios are a useful tool that promotes good UCD. As you will discover later in this book, we find that personas are a method complementary to scenario-based design. Scenarios are one way in which personas can be actively used to enhance and inform design. Together, scenarios and personas become very powerful tools. Any method that enriches the understanding and definition of the target user, which in turn can be used in scenarios to specify and communicate design, offers a powerful extension to UCD practitioners.
creating amalgamated fictional characters based on these profiles, nor have they promoted their user profiles as intense focal points in the design/development process. Hackos and Redish do recognize personas as both a precursor and natural extension of the practices described in their book. Hackos and Redish helped the UCD community understand the value of highly specific information about users in the product design process.

Constantine and Lockwood’s User Roles

User roles and use cases are close cousins of actors, scenarios, and personas. According to Constantine and Lockwood:

A user role, in contrast [to personas], does not look or sound like a real person and is not intended to; it's an abstraction — a relationship, not a person, title, job description, or function. It is defined as a set of characteristic needs, interests, behaviors, and expectations. In its most compact form it is described by the three Cs of Context, Characteristics, and Criteria: (1) the overall responsibilities of the role and the larger context within which it is played; (2) characteristic patterns of interaction, behaviors, and attitudes within the role; and (3) special criteria or design objectives related to the effective support of the role [Constantine and Lockwood 2001, p. 1].
Constantine and Lockwood point out that actors, roles, and personas are highly interrelated and can build on each other to serve different purposes related to product development [Constantine and Lockwood 2002]. For any one product, there are usually a number of possible actors, and for each of those there are multiple roles. For any key role, one may choose to create a detailed persona to help enrich and enliven that role. “The analyst/designer who wants to map out the complete context of use for a particular system must complete a number of activities to identify all the Actors and the Roles they play” [Constantine and Lockwood 2002, p. 1]. They also note, however, that actors and roles should be explored before personas are created. Consider the example of a business-to-business e-commerce application shown in Figure 1.9.

Possible Actors - Customer, Fulfillment, and Credit Approval
Possible Roles of Customer Actor - Regular Buying Role, Incidental Buying Role, and Casual Browsing Role

Casual Browsing Role Description - not necessarily in the industry and buying may not be sole or primary responsibility (CONTEXT), typically intermittent and unpredictable use, often merely for information regarding varied lines and products, driven by curiosity as much as need (CHARACTERISTICS); may need enticements to become customer, linkage to others from same account, access to retail sources and pricing (CRITERIA).

Possible persona of Casual Browsing Role - Brenda Browsefield is a 37-year-old administrative assistant to a manager at a small manufacturer. A New Englander who recently moved to the area, she styles herself as an outsider and independent thinker. A self-starter with a determined look permanently painted on her face, she often does research on her own initiative both to broaden her industry savvy and to be one step ahead of her boss. She has her own office and uses the Web a lot but spends relatively little time on any site (except for Google and the portal of one industry e-zine). Ambitious and impatient, she’s smart and likes to use industry jargon although she is not a geek.

FIGURE 1.9: An example of the interrelated nature of actors, roles, and personas as described by Constantine and Lockwood [2001, p. 1].

Constantine’s approach to user roles, as well as their relation to personas, is provided in detail later in this book (see Chapter 8, “Users, Roles, and Personas,” by Larry Constantine).

Hugh Beyer and Karen Holtzblatt also embrace the concept of user roles (defined in a manner similar to Constantine and Lockwood) as a part of their broader UCD technique known as contextual design [Beyer and Holtzblatt 1997]. Their approach embraces qualitative field research through innovative analysis techniques and model-building to understand users in the context of their environments, organizations, and cultures. One critical model in their approach involves mapping roles and their relationships among one another as well as their relationships to the tools and systems involved. It is worth noting that Tahir and, more recently, Holtzblatt make the case that contextual design can serve as a foundation for the creation of personas [Tahir 1997; Holtzblatt 2002].
Understanding user roles (both as they exist today and how they might be changed with new products) is critical for anyone designing a product or creating personas. From our perspective, personas can also serve as a communication medium and additional model-building exercise within the contextual design approach. In Chapter 3, we describe how to use information about user roles in the persona creation process.

**Mikkelson and Lee’s user archetypes**

Norrun Mikkelson and Wai On Lee have promoted the idea of creating user archetypes to supplement scenario-based design [Mikkelson and Lee 2000]. Their user archetypes are similar to Cooper’s concept of personas, although the genesis of the archetypes was a desire to improve the existing concept of “user classes” (a concept used quite broadly in traditional usability processes). (See, for example, Nielsen [1992] and [1993] and Bias and Mayhew [1994].) According to Mikkelson and Lee:

Traditional approaches to representing the user often take the form of defining users by attribute clusters (e.g., age group, job title) and general experience with features of certain systems (e.g., length and frequency of experience using basic features or advanced features). Via profiles, users are then grouped into *user classes*. User classes are of some practical value because knowledge about these classes allows designers to steer the product in a general design direction.…

In design and evaluation, user classes such as first-time users, expert users, elders, etc. are often defined by human-interface specialists based on simple clustering of user attributes such as computer/system experience, age, job type, etc. Elsewhere, for the purpose of marketing, user classes such as reluctant, enthused, pragmatic, etc. are also defined by marketing and product planning based on the clustering of attributes associated with purchase decision and loyalty.

While user classes may represent the user correctly, designers typically find it difficult to call on them during design. For example, it might be difficult for a designer to imagine what a first-time user is like or how he or she would behave if the designer has never met one. User classes may also lead to inconsistency in mental imaging (e.g., one person’s mental image of a first-time user might be entirely different from another person’s). Most importantly, representing users as user classes often misses what’s important to the users, what their high-level goals are, and fails to capture the “essence” or “spirit” of the user [Mikkelson and Lee 2000, p.1].

Mikkelson and Lee’s user archetypes consist of the following [Mikkelson and Lee 2000]:

- **Description**: Name, picture (or audio/video sample), and one-line summary description.
- **Attributes**: Age, family, lifestyle, roles played, and interests.
CHAPTER 1: THE NEXT FRONTIER FOR USER-CENTERED DESIGN

- **Computer skills:** The user archetype’s knowledge of (and lack of knowledge of) the system(s) they use. The users’ knowledge is represented in a simple (and granular) form the product team can understand. Two types of user knowledge are represented here: declarative and procedural.

- **Concerns and goals:** Three or four high-level and high-priority concerns and goals important to the user.

- **Market size and influence:** How many of this type of user are in the market we are concerned with, and their role in the purchase decision.

- **Activities:** Task and domain knowledge in context. Usually one-page description of typical activities of the user in the form of a “day/week in the life” of the user archetype. This captures life prior to the introduction of new technology.

Mikkelson and Lee provided a process for deriving user archetypes out of user classes based on a variety of data, as well as a method of employing them in product definition and design (though largely as an adjunct to scenario-based design). However, their approach did not have broad adoption.

**Cooper’s Personas**

In *The Inmates Are Running the Asylum*, Alan Cooper discusses many of the reasons he believes high-tech products are built such that they drive us, their users, crazy [Cooper 1999]. Cooper asserts that the very structure of our organizations fosters a focus on technology where we should instead be focusing on people. He introduces personas as part of a solution that will “restore the sanity” to product design and development. While personas were introduced publicly in 1999, Cooper notes that the genesis of personas was really around 1983 as part of a personal role-playing technique that he used while working through design problems on his own [Cooper 2003]. His first formal personas, which better reflected his ideas around Goal-Directed Design® (his trademarked methodology), appeared in 1995 and were used more collaboratively to communicate different user perspectives regarding a complex design solution for a consulting project.

According to Cooper, “Personas are not real people…they are hypothetical archetypes of actual users…defined with significant rigor and precision” [Cooper 1999, p. 124]. In other words, personas are imaginary people we create to stand in as concrete target users for our products. By calling personas “hypothetical archetypes,” Cooper is likely referring to the fact that there is no way to prove that the personas truly are representative of actual users until after the product is released and is being used. When he says personas must be “defined with significant rigor and precision,” Cooper is asserting that it is the specificity and detail of the personas that gives them their value.
When Brenda Buckner’s 29th birthday arrived, she celebrated by going shopping for herself in the morning. Then, she celebrated in the evening by opening presents from her husband, several of which she had suggested to him; in fact, she told him when she saw that great Ann Taylor sweater for 30% off.

Brenda isn’t a selfish shopper, though; she is always on the lookout for that perfect item for a friend or for her husband. Brenda keeps track of birthdays in her day planner, where she also jots down gift ideas and clothing sizes for friends and family. She’s been known to buy a birthday gift ten months in advance of the actual day. When it’s the right item, she knows it and won’t pass up the opportunity to grab it. She feels especially clever when she finds things on sale, though full price won’t stop her from buying. Of course, she always has her eyes open for personal purchases and has no qualms about making an impulse buy.

Brenda generally begins shopping with only a vague sense of purpose; she seldom has a specific item in mind. She may go to a store that has items appropriate to someone’s taste, but she will look for inspiration once she gets there. She knows what stores or departments are definitely not interesting, so she has little patience for stores that force her to walk past a lot of uninteresting merchandise. She will often pick up a few possible items as she browses, then make a decision among them. She likes to make notes about the items she didn’t buy, though, since they may be useful ideas for another occasion.

Brenda’s favorite stores are Nordstrom and Neiman Marcus, which carry a good selection of the best designers and brands. She has high expectations when it comes to service; she expects to find a helpful salesperson nearby whenever she has product questions but prefers to have the staff remain unobtrusive until she needs them.

Brenda lives and works in Minneapolis, which gives her access to numerous shops and malls. Sometimes, though, the weather just doesn’t allow for a Saturday shopping excursion with her friends. To get a shopping fix on a snowy day, Brenda has learned that browsing online can be even more satisfying than browsing and ordering from the stack of dog-eared catalogs on her mail table. Brenda is reasonably comfortable with a computer—she uses basic Microsoft Office functions at work—but is nervous about configuration or other complex tasks.

**Brenda’s Goals**

- Be entertained. Brenda enjoys shopping for the sake of shopping. She expects a good selection and great service.

- Find the perfect item. Whether shopping for herself or for someone else, Brenda enjoys the challenge of finding exactly the right thing.

- Be a shopping expert. Although she would never admit it, Brenda enjoys her reputation as an expert shopper. Knowing what’s available helps her find just what she’s looking for, too.

**FIGURE 1.10: An example persona, named Brenda Buckner. (Copyright © Cooper 2002)**
Story from the field

CUSTOMER SEGMENTATION AND DESIGN PERSONAS: WHAT’S THE DIFFERENCE?

—Frank Spillers, Principal and Co-CEO, Experience Dynamics

Personas are being created at an astonishing rate by design teams, from interactive agencies to large corporate environments. More often than not, many of the customer representations being used in Web development efforts are driven solely by traditional notions of market segmentation (which are typically quantitative in nature and somewhat disconnected from the user's context of use and real-world behavior). At Experience Dynamics, we've found that marketing profiles (Figure 1.11) are often inadequate as a design aid because they miss the strategic role that behavior, cognition, and context play in the interaction design process.

<table>
<thead>
<tr>
<th>Segment:</th>
<th>Domestic Affluent Progressive Shopper</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age:</td>
<td>39 to 45 years old</td>
</tr>
<tr>
<td>Income:</td>
<td>$75,000 – $110,000</td>
</tr>
<tr>
<td>Work:</td>
<td>Educated professional, career oriented</td>
</tr>
<tr>
<td>Hobbies:</td>
<td>Health, community, shopping</td>
</tr>
</tbody>
</table>

Female, recently divorced with 2 children living at home. Lives in metropolitan area (e.g., 15 minutes north of Seattle)

Works full time in white collar industry (e.g., for a manufacturer of healthcare electronics)

Likely to be interested in personal fitness and health. Active in her local community. Is an avid shopper.

Has been online for six years and feels comfortable with ecommerce. Favorite Web sites are Amazon, Lands End and Macy’s.com.

FIGURE 1.11: Marketing profile based on segmentation and market research.

Design personas represent the fruits of labor of more qualitative research [Figure 1.12] and help communicate users’ needs and goals. While it is important to start with an inventory of who your target audience is from a demographic perspective, it is extremely valuable to expand demographics and segments into psychographic and behavioral profiles gathered from field research techniques such as an ethnographic (observational) study, contextual inquiry, or task analysis.
(Story from the field, continued)

**Name/Tagline:** Comparative Caroline  
**Priority:** High (Primary Persona)  
**Type:** Comparative shopper  
**Goal:** Find the best deal  
**Cognitive Background:** High level of familiarity with shopping carts, comparative tools; needs to self-justify each purchase or impulse purchases  
**Tools:** Checks 3–5 sites for each purchase, Google, Pricewatch, consults friends

Comparative Caroline has a pretty good grasp of how the Web works and buys something every month or so online. She likes Web sites to be easy to use and doesn’t have a lot of patience with difficult Web sites. At work she uses the Web to shop around for deals she can’t get in her local stores.

Caroline is resilient about getting the best price online. She will spend several days shopping for one item and has been known to take up to two weeks “shopping around.” Caroline is not shy on the Web and regularly uses Google for her search shopping. She will only click Google Adwords if they have the keyword she is looking for, otherwise she doesn’t bother. Caroline wants to be sold on why a product is the best deal. She doesn’t always shop on price however, but does look for a reason and a feeling as to why purchasing from one site is better than another. For Caroline, the best deal is not always the cheapest buy.

What gets her attention? Free shipping offers, product guarantees, large product images, fast check outs and polite and concise copy.

**FIGURE 1.12:** Design persona based on qualitative data and behavioral profiling.
(Story from the field, continued)

From the design persona, it is easier to derive what to do to meet the user's needs.

What Caroline would like from our e-commerce Web site:

- **Design tip:** Offer easy access to comparison tool at product level. Use warm invitation and bright colors around compare button.
- **Copy tip:** Use respectful and polite copy that emphasizes benefits, satisfaction guarantee, and customer service. Justify price in the product images and in the body of the copy.
- **Marketing tip:** If using cookies, use time-expires offers with this user (anticipate conversion over multiple visits). Use specific product keywords in search engine ads.

Because the goals of usability are often driven by successful task completion, it is crucial to understand the finite details of user needs/goals, behavioral routines (tasks), rhythms, and expectations of your user population. Marketing profiles should not be confused with behavioral personas, whose focus is to specifically inform design decisions. Personas should help you understand your users more deeply; that is, “what they do” and “why they do it,” not simply “who they are.”

Key to Cooper’s personas is that the representation is based on distinct user goals, in addition to behaviors, tasks, or simple demographic information. Cooper’s approach, Goal-Directed Design®, focuses on uncovering, understanding, and designing towards the central needs and motivations of users – goals. Cooper asserts, and we agree, that personas created with goals as the critical centerpiece can inform product design in a profound way; one that can result in elegant, broad reaching and lasting solutions. Figure 1.10 shows an example persona from Cooper, which was derived from and reveals critical user goals.

THE NEXT FRONTIER FOR PERSONAS

Personas and other user representations have been “discovered” and used in various disciplines to infuse user data into other processes. Usually, these user representations are built and communicated as static documents or other artifacts that provide a snapshot of interesting and relevant information about users. These artifacts have proven helpful, largely because they help make information about users highly accessible, engaging, and memorable to people making decisions.

These representations are not alive, however. They are depicted as motionless portraits, usually contained within a single finite and static document. There is no room for growth or
development. That is, unlike a character in a book or film, personas do not evolve. Moreover, the team using them is supposed to “get to know them” almost instantly. When we get to know a friend, neighbor, colleague, or even a character in a favorite book or TV show, we build up an understanding of them (i.e., we develop a relationship with them). Once we know people, we are able to understand why they do what they do, what they want, and what they need. Engendering this level of understanding is the next frontier for user representation.

We believe you have to enable personas to “come to life,” allowing them to develop in the minds of the people using them. To be very clear, we are not suggesting that personas change drastically over time, take on new characteristics, or develop new skills (they are not to be moving targets). Instead, we believe that personas must live in the minds of your colleagues. Towards this end, we propose that persona practitioners must:

- Embrace the challenge of communicating information about users through narrative and storytelling
- Maintain a lifecycle perspective when educating colleagues about personas
- Allow the people using the personas to extrapolate from and extend them.

In other words, personas should be more than a collection of facts. Personas should be compelling stories that unfold over time in the minds of your product team. We believe that successful personas and persona efforts are built progressively. Just as we get to know people in our lives, we must get to know personas (and the data they contain) by developing a relationship with them. No single document, read in a few minutes or posted on a wall, can promote the type of rich and evolving relationship with information about users that is the cornerstone of good product development. No single document can contain the wave of scenarios and stories your personas will inspire. As long as the personas are well built, data driven, and thoughtfully communicated, the product team can use the personas that come to exist to generate new insights and seek out the right details when they need them.

This book explores ways of bringing personas to life in the minds of product teams. The deep and ongoing focus on well-understood users that results will benefit your product, your team, and your company.

**SOUNDS GREAT! LET’S USE PERSONAS! …IT’S EASIER SAID THAN DONE**

If personas are such a good thing, why isn’t everyone using them? Perhaps one answer is that creating and using personas is easier said than done (which is why we wrote this book). Although the persona concept has become increasingly well known and used, many practitioners (even experienced ones) hunger for fundamental how-to knowledge about the method. The truth is that little is commonly known or broadly shared about how best to
create and use personas in development projects. Even less is commonly known regarding how this technique can benefit from, or be used in concert with, other UCD techniques.

**The dearth of detailed guidance on personas**

While introducing personas in *The Inmates are Running the Asylum*, Cooper presents the basic ideas behind the creation of personas and their application toward design. Overall, the book does an excellent job of evangelizing the concept of personas as well as Cooper’s overarching approach, Goal-Directed Design®. The notion of personas was so compelling that many practitioners began trying it; and as they did so, there was a resounding call for more information on how, exactly, to create and use personas.

In *About Face 2.0*, Cooper and his long-term colleague, Robert Reimann, provide an answer to the call for more information on their approach [Cooper and Reimann 2003]. And while their book incorporates new material on personas, *About Face 2.0* is broader in scope than personas, presenting a more complete description of Goal-Directed Design® and offering commentary on the state of the software industry. Because of this broader focus, Cooper and Reimann provide general guidelines to persona creation, rather than specific procedures, instruction and examples. And while Cooper does provide additional detail on personas on his Web site, www.cooper.com (and regularly offers tutorials on his approach at conferences and via Cooper U™), the requests for more information and guidance have continued.

This need has led other UCD professionals to contribute to the methodology and literature on personas. For example, there are a variety of case studies, examples and revealing discussions available on the Web, some of which we highlight in this book. Perhaps more importantly, there are now several books which cover the topic of personas in a more end-to-end fashion.

Bob Baxley includes a chapter on personas in his book *Making the Web Work* [Baxley 2003]. Although Baxley describes the value of the persona approach, his biggest contribution to this area is a set of five examples of personas, complete with details about their key characteristics. He also includes some information on process, though perhaps not in sufficient detail to enable the reader to create personas without additional support.

In his book *Observing the User Experience*, Mike Kuniavsky also offers a full chapter on personas [Kuniavsky 2003]. His coverage of the method is fairly complete, offering detailed how-to and an example of a profile. Although he seems to purposely avoid the term persona (referring to this instead as a user profile), his approach is very much like Cooper’s. Kuniavsky provides a very useful list of core attributes of personas, which we refer to in Chapter 4.

One other book, *Information Architecture: Blueprints for the Web* (by Christina Wodtke), offers a perspective on personas that includes some good process information and examples [Wodtke 2002]. One noteworthy part of her coverage is the inclusion of a section on writing
scenarios from personas and then moving from the scenario to task analysis and on to wireframing and full design. Wodtke also contributed several “Stories from the field” to this book.

In spite of these resources, until now, there has remained no truly comprehensive and detailed coverage of this topic (i.e., one that provides specific steps, rich examples, and insights on the method in practice). Cooper served as our first inspiration to develop the method we now use as standard; our process has continued to be inspired by the practice of others as well.

As we developed our own approach, we talked to many practitioners and learned from their experiences. We discovered that many were encountering the same kinds of questions and problems. The lessons we learned from experienced persona practitioners helped us isolate several key problems that we set out to solve.

**Personas are not always successful**

One of the reasons we wrote this book was to provide solutions to some of the common problems practitioners have experienced when trying to use personas. Just creating personas is simply not enough. Many practitioners have had less than stellar experiences with personas. In some cases, the initial attempt has failed to such a degree that the likelihood of further attempts is all but gone. Even well-crafted personas can result in little or no focus on users in the development process, and poorly executed persona can keep the development team from investing in other UCD techniques or other efforts that improve product quality. So, why do some persona efforts fail? We have uncovered the following four common reasons. The sections that follow expand on these reasons based on our research.

1. The effort was not accepted or supported by the leadership team.
2. The personas were not credible and not associated with methodological rigor and data.
3. The personas were poorly communicated.
4. The product design and development team employing personas did not understand how to use them.

**Personas failed when the effort was not accepted or supported by the leadership team**

Many persona efforts are often grass-roots efforts. A few people learn about personas, decide it would be a great thing to do for their product, and then attempt to employ them without considering the fact that they are potentially introducing a major change in the product development process and culture of their company. In such cases, the impact of the personas is typically minimal (persona use is limited to a select few and typically dies out over time). To do personas well, you need to garner the support of the key leaders on your team or elsewhere in the company. Doing an upfront analysis of your organization and product team needs is critical. But perhaps more important is getting the support of high-level people within your organization. In Chapter 3, we provide some specific approaches to solving...
this issue. Following these will ensure that you get off on the right foot and have ample resources for completing a persona project with success (e.g., people resources for creating and promoting personas, a budget for posters or other materials to make the personas visible, and a mandate from team leaders for people to actually use the personas).

**Personas failed when they were not seen as credible and associated with methodological rigor and data**

In some projects, the personas that were created were just not believable. Personas do have a fictitious component to them. Creating a believable, realistic, and credible representation of your target users involves considerable effort and is somewhat of an art. If you are not careful, your personas (or your process) can be perceived as lacking validity or rigor (i.e., that your process was not thorough, precise, or methodical). Sometimes personas are not actually created with data: they are based on loose assumptions or are completely fictional. In those cases, they need to be communicated as such, and the degree to which they can be trusted and used should be kept in check. Even where personas are created rigorously out of carefully analyzed data, if the relationship to that data and process is not clear there is a risk of lost credibility. The perception of rigor is important. In Chapter 4, we provide you with a process and specific suggestions for ensuring that lack of credibility is not a major issue in your persona effort.

**Personas failed when they were poorly communicated**

If your team is not aware of the personas — and of the method more generally — you will not be successful, even with credible personas supported by your leaders. Moreover, if your team is not reminded of the personas regularly, they will be forgotten. We have been witness to numerous instances of personas simply not being communicated well. Often the main communication method was a résumé-like document that got posted around the office building. Little thought or effort was put into communicating the information in the personas deeply and meaningfully. The result was that most people on the product team didn’t really know much about the personas other than their names and photos. There was no sense of a shared understanding or language.

In other cases, even when the team had learned who the personas were, the team’s focus on the personas faded over time. Your personas will need refreshing and revitalizing from time to time. Understand that personas will continue to evolve in the minds of the people using them. Your team will need to progressively get to know them, developing an understanding of them over time. In Chapter 5, we provide numerous ideas and examples to make your personas known and to help keep them fresh in the minds of your product team over the potentially long haul of a development cycle.

**Personas failed when the team did not understand how to use them**

By far the most problematic issue for persona efforts is the lack of understanding of how to use them once they are created and communicated. In many cases, we have found that there were no explicit uses of the personas beyond just using them to aid design discussions in meetings. Using them in discussions is a fine thing to do, but in isolation this keeps the impact of personas to
a minimum. In other cases, some persona practitioners have crafted methods of using their personas more directly. Without well thought out uses and explicit instructions on how to involve them, personas can be a distraction instead of an aid. In Chapter 6, we provide an array of tools and techniques for utilizing personas and offer suggestions for integrating these tools with existing practices.

In their article “Personas in Action,” Blomquist and Arvola describe issues with the persona method [Blomquist and Arvola 2002]. The personas in their study were not used well by the design team, even though they had the knowledge necessary to do so. This highlights the importance of integrating this method with those that already exist in an organization. Tom Chi and Kevin Cheng reiterate this point in their commentary on the persona method. Clearly, for the persona method to overcome these problems, practitioners need some help.

Story from the field

PERSONAS. LOVE ‘EM. HATE ‘EM. STRUGGLE TO INTEGRATE THEM. ARE THEY TRULY USEFUL, OR A LITTLE HOKEY?
—Tom Chi and Kevin Cheng, OK-Cancel.com

Perhaps one of the more controversial aspects of personas is the colorful narratives created around them. Who could possibly care that Ted the Persona drives a blue Buick LeSabre? Or that he is allergic to shellfish? Even when the stories are centered around work, there is always that nagging voice that questions the relevance and applicability of the information being invented. Are we really modeling users well, or simply creating stereotypical users from unfounded assumptions?

One thing that can be said for these stories is that they are memorable. This is because narratives are excellent mnemonic devices. They create a temporal and causal framework that allows our brains to store quite a bit of data. Mention one detail about Juanita and the rest of the story comes flowing back: Oh. She has two kids and has to work late at her financial services company… and because she stays late she starts tasks that require deep concentration after 5:00 p.m. And so on. Of course, such stories can also get mangled after a generation of retellings — but for the most part personas do a good job of creating a shared vocabulary to call up significant detail about user segments.

While having a shared vocabulary is better than having none, it’s quite the tricky endeavor to develop the right vocabulary. Even if you’ve profiled 100 users to develop your set of personas, often you will still find users who don’t quite fit in the categories you’ve created. And even if you do successfully abstract them it’s often not clear how that abstraction should inform design. For example, most persona sets have a user who is the “novice” user. What does this mean, though? Can you assume that said user understands drag and drop? right-click? tabbing through fields? In testing you might see that novice user 1 might understand two of the concepts, and novice user 2 understands the third. They are the same persona in front of the same screen, but the results will be vastly different.
The dearth of information on how to organize and execute a persona effort, particularly how to do it well, and our frustrations with our own first attempts, led us to organize several workshops and seminars on personas with other “persona practitioners” in the industry, including participation from Cooper’s organization. From these interactions with other practitioners, we were able to gather and explore detailed examples, step-by-step procedures, best practices, and lessons learned. The structure and content of our book is based on the outcome of these workshops as well as our own experiences with the persona method since then. This resulted in an approach based on the following core assertions:

- Building personas from assumptions is good; building personas from data is much, much better.
- Personas are a highly memorable, inherently usable communication tool if they are communicated well.
- Personas can be initiated by executives or first used as part of a bottom-up grass-roots experiment, but eventually need support at all levels of an organization.
- Personas are not a standalone UCD process, but should be integrated into existing processes and used to augment existing tools.
- Effective persona efforts require organizational introspection and strategic thinking.
- Personas *can* be created fast and show their value quickly, but if you want to obtain the full value from personas you will have to commit to a significant investment of time and resources.

We understand that the devil is in the details when it comes to launching a persona effort within an organization, and we are excited to share the wealth of knowledge that has been shared with us and developed over time. That is what this book is all about.
We include practical methods, detailed instructions, and examples

This book includes stories, suggestions, and best practices contributed by UCD and other product development professionals from around the world who have experience in using personas for product design and development. It also includes step-by-step instructions for every phase of your persona effort. This book contains:

- A start-to-finish persona lifecycle that breaks down and organizes the elements of a successful persona effort. Each phase of the lifecycle includes rich descriptions of procedures, techniques, and tools. Our goal is to provide enough information and instruction so that you do not need to supplement our book with any additional training or tutorial, or by hiring a consultant.

- Discussions of the issues related to launching and managing a persona effort within an existing software organization or effectively as a consultant. We agree with Cooper’s assertion that personas can build communication, consensus, and commitment within a software development organization, and we detail techniques that help make these things happen. We provide a series of strategic discussions on how to use personas to establish the role of UCD professionals as a key element of the product development process. These discussions convey how to do this early (and with a more permanent result) in the process, including frank discussions of product development politics (e.g., how to build communication, consensus, and commitment regarding personas).

- Many examples — describing experiences good and bad — of all tools and artifacts we recommend. During our workshops and seminars, we realized the power of stories and examples and are thrilled to include contributions from many colleagues, including:

  **Story from the field**

  We have collected a large number of short case studies, anecdotes, commentary, and opinions from other persona practitioners and user experience professionals in a variety of domains and industries. These stories should give you contextualized ideas about what to do, and what not to do, as you launch and maintain your own persona effort.

  **Handy Detail**

  These are important reminders, useful definitions, and fine details we don’t want you to miss.

  **Bright Idea**

  These sidebars are practical techniques, tools, and innovative methods you might want to try. They are recommended best practices. As you develop your own approach as a persona practitioner, refer to these practical tips and insightful suggestions for how to solve problems your colleagues have already encountered. Adopt and adapt the best practices of other practitioners.
This book is for you — no matter what your discipline or role in product development

We set out not so much to write a textbook or scientific document but to create a useful handbook for practitioners. This is primarily a book of practice, not theory (though contributed chapters help provide the rationale and theory behind the practice). We believe our book will make an excellent addition to the collection of books for professionals in usability, interaction design, and user-centered methods. We hope that academic readers (students and professors) involved in research and degree programs in human/computer interaction and related fields (e.g., technical communication, graphical and interactive design, industrial engineering, human factors, applied/workplace anthropology, information science, and cognitive, applied, or industrial/organizational psychology) will find it evocative and useful in preparing for a career in the world of product development. We believe it would be especially useful reading for interns or new graduates moving into industry positions.

Because many user experience teams are actually “one-person teams” with few resources and little time, we include a range of tools and suggested best practices that enable personas to be accomplished on a tight budget. We provide coverage in the book for user interface consultants working outside or independently of the actual development team or company, including those who may not be able to directly impact or be involved in the entire product development cycle. Although the information in this book applies to many industries, most of our examples come from software and Web development.

How to use this book

We hope our book becomes a tattered resource you return to often for useful examples and practical information about the entire persona process. We have designed the book to be read front-to-back and to be consulted as a phase-by-phase reference guide.
The content of our persona method book is structured around a concept we used to organize our persona practitioner workshops. We call it the “persona lifecycle.” As you will read in Chapter 2, we make an analogy to the human lifecycle. The persona process goes from family planning, conception, gestation, birth, maturation, and adulthood through to retirement and celebrating lifetime achievement at the end of the project. For the practitioner, the process of creating and using personas follows this basic, largely serial, cycle. The persona lifecycle requires an end-to-end mindset on the part of the practitioner and reinforces a basic tenet that any persona effort should be considered an ongoing campaign that does not end when your personas are created and delivered to the development team.

Our book consists of an overview of the persona lifecycle (Chapter 2) and five core chapters (Chapters 3 through 7) which cover the phases of the persona lifecycle. We hope you will keep coming back to the core chapters throughout your own projects for ideas, tips, and techniques for warding off potential hazards (chances are, if you run into a problem, others have been there before you).

We have also included several supplemental chapters by invited experts at the end of the book. These chapters are in-depth explorations of specific topics related to personas:

- Chapter 8: Users, Roles, and Personas (Larry Constantine)
- Chapter 9: Storytelling and Narrative (Whitney Quesenbery)
- Chapter 10: Reality and Design Maps (Tamara Adlin and Holly Jamesen)
- Chapter 11: Marketing Versus Design Personas (Robert Barlow-Busch)

We think you will find these chapters both interesting and useful as you explore the method.

**SUMMARY**

We hope you are inspired to begin learning about personas, and more generally about UCD. We know that writing about it and collecting examples and best practices from around the community has inspired us. Personas are not only useful tools but fun to create and use.

As you read this book, you are going to find a great deal of information on the method: many details, tips, tools, and complexities you never expected. Don’t let that scare you. Effective persona efforts can range from incredibly simple to fairly complex and involved. As we point out in Chapter 7, there is a cost to doing personas. It is not free and it will take away from other work you could do for your company. We believe that if you are going to do personas you should do it well or not at all, but we don’t believe this means you have to spend a tremendous amount of time and money. We hope you will use the ideas in this book to customize your own process — after first understanding your organizational culture as well as your product and business needs.