

CO-CREATIVE WORKSHOP

# CO-CREATING PERSONAS

Using the know-how of a group of invited participants to create a set of personas.

<b>Duration</b>	<p><b>Preparation:</b> 0.5–2 hours (depending on group size and amount of data)</p> <p><b>Activity:</b> 2–4 hours (depending on group size, amount of data, and number of personas)</p> <p><b>Follow-up:</b> 1–3 hours (depending on number of personas and intended fidelity of personas)</p>
<b>Physical requirements</b>	Paper, pens, masking tape, paper templates (optional), research data as input and inspiration for participants
<b>Energy level</b>	Middle
<b>Researchers/Facilitators</b>	Minimum 1
<b>Participants</b>	Approximately 5–20 people with good knowledge of your target groups (e.g., customers, different departments)
<b>Expected output</b>	Drafts of personas (physical or digital), workshop photos, quotes of participants (audio or text), videos of workshop progress

The quality of the results of any co-creative workshop depends on the knowledge of the workshop participants. In this case, it will depend on how much participants know about the group of people you want to exemplify with personas. For example, if you want to create personas of customers you would do well to invite frontline employees who are in direct contact with customers every day. Be careful if you conduct a co-creative workshop with people who do not have sound knowledge or only a superficial or abstract knowledge of the subject matter. **The results might look convincing, but often they are very biased. For example, if a marketing team without prior qualitative research and without deep knowledge of the daily lives of customers conduct a co-creative workshop on personas, the outcomes tend to represent their ideal customers. Using such**

idealized personas as a basis for a design process is risky, as you could end up with concepts that lack a customer base.<sup>01</sup>

In addition to the know-how of the workshop participants, a second important factor for any co-creative workshop is the qualitative research you do prior to such workshops. As a rule of thumb, the more valuable data you bring to a co-creative workshop, the more representative your outcome will be.



A



B

- A Even though age and gender is always an easy start for a persona, demographics might be quite misleading. Instead, think of factors that differentiate the groups you would like to represent with your personas.
- B The quality of personas created in a co-creative workshop depends on the participants' knowledge of the group you want to base your personas on and on the process you use to create them. First diverge to create many different personas, then converge to the most useful and realistic ones.

<sup>01</sup> See #TISDD 3.2, *Personas*, and #TISDD chapter 10, *Facilitating workshops*, for hands-on tips on facilitation and how to build a safe space.

## Step-by-step guide

### 1 Plan and prepare

Determine who you'll invite as workshop participants and prepare your invitations. Describe the aim of the workshop, set expectations for your workshop, and think of an incentive for participating in the workshop if appropriate. Prepare the room (or any other venue you choose for your workshop) and write a list so that you don't forget any essential material (templates, sticky notes, pens, research data, etc.). Write a facilitation agenda and establish facilitation guidelines to create a safe space through warm-ups and so on.

### 2 Welcome and split into smaller groups

Start your workshop with a welcome, describing the workshop's aim and agenda, and facilitate an

introduction of all the participants. After a warm-up, split the participants into subgroups of 2–3 people. Introduce the concept of personas, explain the templates, and give them clear instructions on how to work with these.<sup>01</sup>

### 3 Create initial personas

Have each group create 3–5 personas of their most common customers. Additionally, they can create some extreme customer personas (their most stressful customer, their dream customer). The facilitator should check that all teams have a common focus and are following the same instructions.

### 4 Present and cluster

Have each group present their personas and stick them on a wall. Cluster similar personas together right away. You'll realize when the group recognizes familiar customers from their laughter, nodding, and smiling. Ask the group to elaborate on such personas and try to find out which details actually made them recognize the underlying customers each particular persona represents.

### 5 Discuss and merge

Give the participants some time to reflect, rearrange, and cluster. Let the group choose the most common personas. These are typically the biggest persona clusters on the wall or the personas where most participants laughed or nodded. Ask the participants if the chosen

<sup>01</sup> See also #TISDD chapter 3, *Basic service design tools*, and method description *Creating personas*.



personas represent the diversity of gender, age, and other quantitative factors you know about your customers. If not, modify some of the personas to match these factors. The final distribution does not need to be representative, but if elderly female customers are a significant part of your business, it would be a mistake to only have young male personas. Create new personas for the main clusters based on the merged data.

## 6 Visualize and validate

Enrich the personas with facts derived from research data or by sharing with other stakeholders. Visualize and finalize your personas. This step can be done after the workshop or in another workshop with different participants.

## 7 Iterate

Run the workshop several times with different participants. Watch for patterns and maybe invite participants back for a final workshop to merge all the personas into your final set.

## 8 Follow-up

Go through your notes and check different positions taken by your workshop participants. Index the generated data and highlight important passages. If needed, process your journey map into a format that is easier to comprehend (physical or digital). Write a short workshop summary that includes your key findings as well as the journey map and raw data you collected during the workshop from your participants, such as quotes, photos, or videos.

## Method notes

- Consider repeating the workshop with different participants to identify patterns between different participants or different workshop settings.
- Sometimes it is useful to schedule follow-up interviews with some or all of the participants to understand their perspective and ask follow-up questions. Look for rather quiet participants, who might prefer to talk with you in a one-on-one situation instead of a workshop situation. ◀