

# CREATING PERSONAS

Creating a rich description of a specific fictional person as an archetype exemplifying a group of people, such as a group of customers, users, or employees.

<b>Duration</b>	0.5–8 hours (depending on complexity and amount of data)
<b>Physical requirements</b>	Research data, persona templates (paper-based or digital), paper, pens, masking tape
<b>Energy level</b>	Middle
<b>Researchers/Facilitators</b>	Minimum 1 (a better approach is to have teams of 2–3 researchers)
<b>Participants</b>	2–12 (optional)
<b>Expected output</b>	Personas

Personas<sup>01</sup> usually represent a group of people with shared interests, common behavior patterns, or demographic and geographical similarities. However, demographic information such as age, gender, or residency is often rather misleading, so be careful to avoid stereotypes.<sup>02</sup> You can either use existing market segments or use the opportunity to challenge current segmentation and try more meaningful criteria.

When developing customer personas, you should aim to create approximately 3–7 core personas representing your main market segments that could be used company-wide. If you create more than this number of personas, it is unlikely that you will really use them in your work simply because people won't remember all of them. We often see these core personas used throughout a company – they become like friends. Employees remember their background stories, including their different expectations

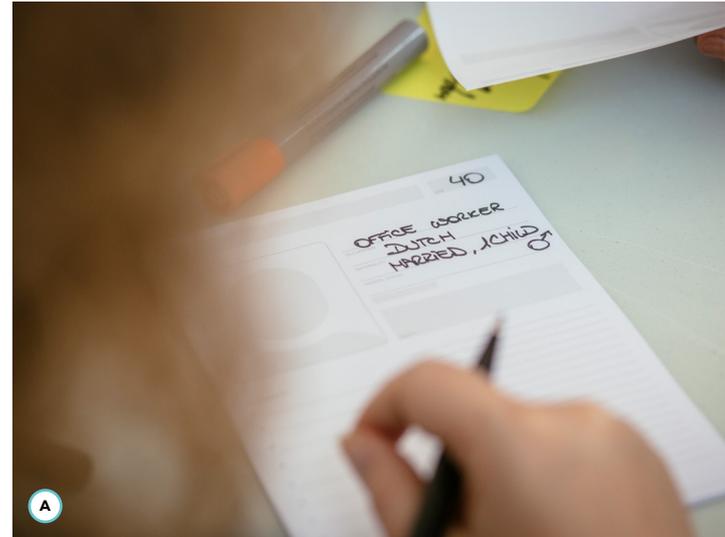
<sup>01</sup> See #TISDD chapter 3, *Basic service design tools*, for a brief introduction to personas. For a comprehensive introduction to how to create and use personas see, for example, Goodwin, K. (2011). *Designing for the Digital Age: How to Create Human-Centered Products and Services*. John Wiley & Sons.

<sup>02</sup> See, for example, the *Wired* article "Netflix's Grand, Daring, Maybe Crazy Plan to Conquer the World" from March 27, 2016, that quotes Todd Yellin, Netflix's VP of product innovation: "There's a mountain of data that we have at our disposal. That mountain is composed of two things. Garbage is 99 percent of that mountain. Gold is one percent ... Geography, age, and gender? We put that in the garbage heap."

and behavior patterns. Following the principle of “design for the average – test with extremes,” you can have many more “edge-of-the-curve” personas to test ideas and prototypes with people from rather extreme ends of your user spectrum. Although you’ll mainly use your core personas during a design process, it makes sense to test ideas as early as possible with these extreme cases, too. Such extreme or edge-of-the-curve personas could, for example, be people who would never use your offerings. You might be able to tweak a concept to cover these and thus increase its usefulness not only within your core target group, but also beyond it.

In a project, you often mix different approaches to create personas – for example, starting with some quick, assumption-based personas on your own, then inviting frontline staff and other stakeholders to a co-creative workshop<sup>01</sup> to develop some more assumption-based personas. In a third step, these assumption-based personas are then aggregated, enriched, and backed with research-based data.

<sup>01</sup> See method description *Co-creating personas* for a detailed description of how to run co-creative workshops for this purpose.



- A By starting personas with demographics like age, gender, nationality, job, and so on, you run the risk of following certain stereotypes. Instead, try to build your personas from your research and patterns you find within your data.
- B Enrich your personas with contextual photos of the personas' lives. These mood images should reflect your research findings. For example, a photo of what personas typically carry with them might help you during ideation and prototyping if you have questions like “Do they have coins with them or just a credit card?”

## Step-by-step guide

### 1 Prepare and print out data

Use your research wall or prepare your research data by printing out key pictures, writing out great quotes, visualizing audio recordings or videos as quotes or screenshots, and putting out your collected artifacts and all other data that might contain information about your personas. Prepare the room with material you'll need to create personas, such as persona templates, paper, sticky notes, pens, and of course your research data, as well as existing personas, journey maps, or system maps. Also, think about who should join you to create your personas.

### 2 Define groups

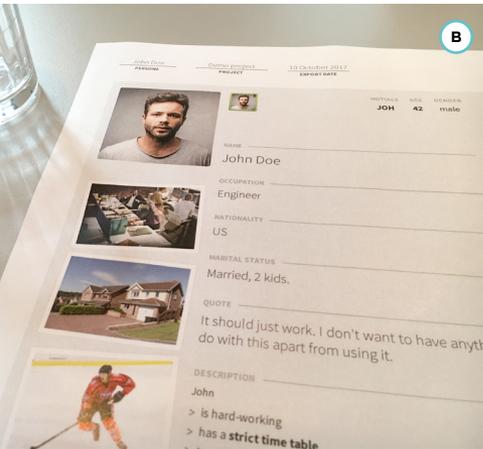
Define groups of customers, employees, and/or stakeholders that you would like to exemplify with personas. Use your research wall, your research data, or existing segments to define these. Sometimes it can be useful to base personas on different patterns within the journey maps when you can see significantly different usage of channels, sequences of steps, or patterns in the emotional journeys.

### 3 Create personas

Define certain criteria that differentiate the groups you defined. These are the starting points for your personas. Create a list of other criteria you'd like to include in your personas and start to merge your research data and findings into the different personas. **Take a step back from time to time to cross-check if the personas are realistic or if they feel too artificial, too constructed, too much like patchwork.** Remember, one of the main reasons to create personas is to be able to have empathy with them, so you need to balance out the different factors and criteria you want to include in your personas with the need for authenticity. Sometimes it helps to visualize how the different personas relate to one another – for example, with a simple matrix or a portfolio.

### 4 Iterate

Validate your underlying assumptions, find gaps in your research, and iterate:



- Are you missing some data for your personas? Iterate your research and formulate research questions to fill any gaps.
- Do others agree with your personas? Present your core personas to frontline staff and ask them to match customers with your personas. Check which aspects are wrong or missing.
- Can you really find people who match your personas? Use existing research data or conduct more research to find this out. If necessary, create new personas, change existing personas, and discard useless personas.

## 5 Follow-up

Document your progress with photos and write a summary of your persona portfolio. If needed, progress the fidelity of your personas into a format that you can distribute in your organization or to your client (physical or digital).

## Method notes

- Quotes make personas more vivid. What do the personas often say about their lifestyle or about your company? Also, photos help to create more empathy toward personas. Choose images of normal people and always avoid using celebrities; you normally do not have just famous people as your customers.
- When creating personas, giving these fictional archetypes realistic names makes them more approachable.
- There are many templates to create personas or guidelines that you can use to build comprehensive personas. One often-used approach is empathy maps that identify potential pains and gains and include topics like “What does the customer think & feel/hear/see/say & do?”
- To take personas further, use a persona’s goals, issues, and unmet user needs to stimulate development of “What if?” scenarios and ideation sessions on iterations of an existing service or to develop a new service. You can also use

them to guide recruitment in ethnographic studies, or as a starting point to create journey maps or build service blueprints from.<sup>01</sup>

- **The most common pitfall when creating personas is to create “idealized customers,” not customers you will find in reality.** This often happens when people who are not in touch with customers on a daily basis create personas that are purely based on assumptions and not backed by research data. These personas are rather useless and can even be dangerous, as they may tempt you to base parts of your design process on wrong or misleading assumptions. You might develop ideas, concepts, or prototypes that do not truly fit your target group. ◀

<sup>01</sup> This is a tip by Phillippa Rose. See also her case study on how to use personas in a service design project: #TISDD 5.4.3, *Case: Developing and using valuable personas*.