Experience Personas: A Good Idea?

Persona Primer

Personas are fictional characters, which you create based upon your research in order to represent the different user types that might use your service, product, site, or brand in a similar way. Personas should be designed in a Pareto assumption: 20% of your users use 80% of your functionality.
(Source: Interaction Design Foundation)

A good persona reflects the as-is state, not to-be. You should stick with the customers you have now, not what you want them to be in five years. It's the only way personas work. Also, avoid idealizing personas. (Source: Uxpressia.com)

Some personas are incredibly detailed, whereas others simply offer a brief sketch of each type of user. Personas generally include:

- *Day in the life Scenarios*
- *Physical, Social, Work Environment*
- *Demographics*
- *Goals and Tasks*
- *Skill levels*
- *"Quote" summing what's most important to them*

(Source: Usabilty.gov)

Traditional Persona Concepts and Usage

Traditional personas have tended to be defined for design and marketing activities around types such as:

1. Goal or scenario directed (e.g., what does user want to do)
2. Roles and skills (e.g., field worker, software engineer, power user, occasional user)
3. Temperament (e.g., logical, caring, aggressive, and impulsive)
4. Engaging or Personality types (e.g., Myers-Briggs, backgrounds, cultures)

Example IT personas we've seen:

*   Power User
*   Data Gatherer
*   Action Jackson
*   Change Fighter
*   Technophobe
*   Fad Chaser

Once personas and scenarios are developed and agreed, they are then used most effectively in short Agile sprints as design and test criteria. The current reality is that the personas are used a few times in development then set aside until needed again for changes or replacement. Personas are now used in a moment in time to address a specific need for that information. Given the fact that a product or service usage life is far longer than development this is to be expected.

If there is an extended period from when a product or service is developed until another design cycle is required, it is very likely than the entire persona creation process will need to be repeated. As we know that experience is dynamic and constantly changing, people evolve and move from persona to persona over time as well. Personas have not been generally used to verify design goals after the product or service has been put into use. This is another unfortunate reality of people doing their jobs in common functional silos.

Elements of Experience Design and Management

A lot has been written regarding human psychology and **how or why** someone makes a decision about sentiment, perceptions or experience. This information is clearly valuable when designing personas as it provides another characteristic to help identify appropriate membership.

When we measure and interpret experience from a large sample of a population though, we are interested in **what** the experience measures patterns for a given experience indicator are; not how or why any one individual came to like or hate the experience. We want to know what are the findings results *broadly across many people*.

When we talk about experience, we often use a variety of phrases. On the system, In the system. Left side (Envision, Enable), Right side (Execute, Embrace). Sender of experience, Receiver of experience. Fit for purpose, Fit for use. Experience indicator, Judgment. These, and others, all are related and many are overlapping.
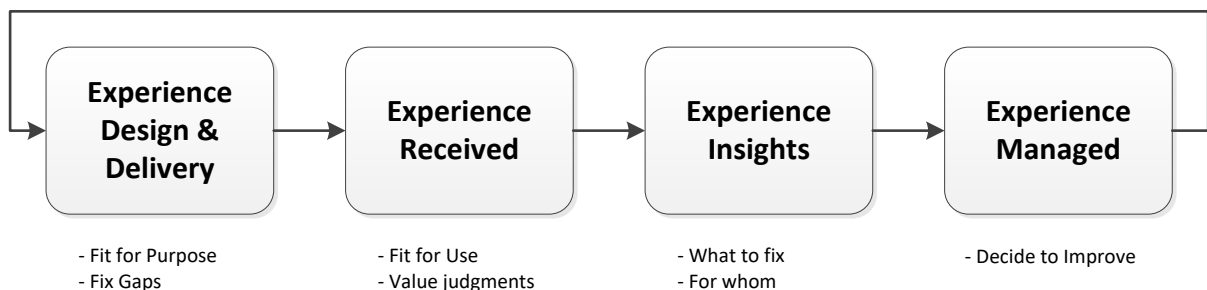
When a product, application, or service is designed for experience, it must meet the following completeness and success requirements:
1. Appropriate = does what is needed to be done
2. Complete = does all that is needed to be done
3. Available = is accessible when user needs
4. Valuable = does it well from user point of view

Both "1. Appropriate" and "2. Complete" requirements make the product or service "fit for purpose." That defines the sender of experience's tangible success as part of "working on the system".

Both "3. Available" and "4. Valuable" requirements make the product or service "fit for use." That defines the receiver of the experience's personal view or opinion of success as part of "working in the system."

Judgment perceptions speak to the "how well" did the requirements get met and the quality of the experience both sent and received. The experience receiver's judgment or perception or sentiment about how well we did with their given product or service is what really matters. When we measure experience, it is nice to get positive feedback however, it is the gaps in expectations and experience ambitions that we really want to accurately identify, meaningfully interpret and appropriately action to improve the gap.

Experience Design & Delivery	Experience Received	Experience Insights	Experience Managed
- Fit for Purpose - Fix Gaps	- Fit for Use - Value judgments	- What to fix - For whom	- Decide to Improve

When we design Experience Indicators (XIs) or survey questions, we are striving to ask customers or employees for feedback, hints, clues, and direct evidence of something broken or deficient in the experience we have delivered and that we can and should fix.

Negative feedback examples include:

- Fit for use issues that they find costly in time wasted or lost productivity
- Fit for use issues that they find something to complex or hard to use
- Fit for use issues like too many outages taking too long to fix
- Fit for purpose issues like the product or service does not solve their business need
- Fit for purpose issues like lack of self help for certain issues that causes annoyances

The insights from that X- data sentiment, coupled with experience related technical O- data allows us to understand what the experience is, the meaningfulness of our insights, what needs to be fixed, and for whom. Those meaningful findings and actionable recommendations for change or improvement then must be governed, decided whether to improve and if yes, fix the gap discovered.

Personas in Experience Design

A decision to develop or change a product, application or service is first based on determining if the solution is technically feasibility and business viable. Traditionally then, IT goes off and builds something in a vacuum because "they know best what the users need." In the Agile model, user input about what they want and how they want it to work is accepted as critical and taken into account in the design and development phases.

Personas have been the practical mechanism to ensure these points of view and user requirements are identified, communicated, managed and incorporated.   This becomes a "many to one" situation. That is: many different points of view are used to create something, like a singular custom application, that can be widely used across those many personas or users.

Personas 100%

Personas 75%

Personas 50%

Personas 25%

Custom Application for Wide Use

MANY to ONE
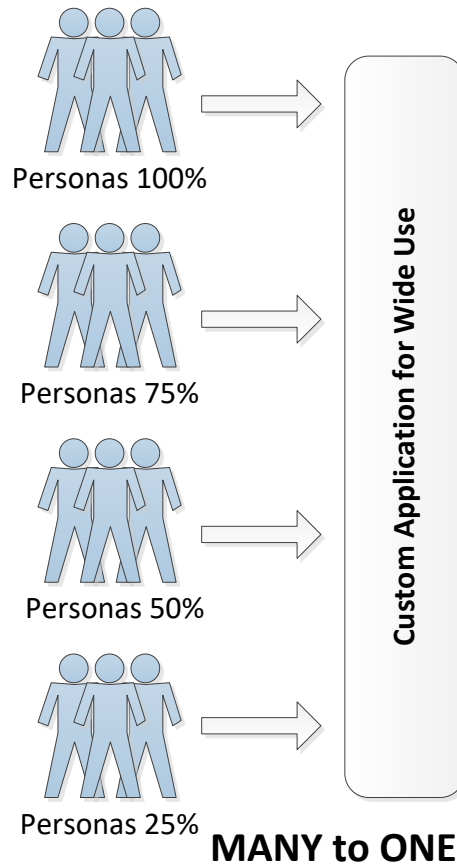
For example: let's say that we have created 4 goal personas for a new application that has four functions A, B, C and D. The designed experience is to be based on persona-oriented goals of which functions will be needed by persona and the skill levels to use those functions.

We may discover that "Persona 100%" will need to use all new application functions A, B, C and D. "Persona 75%" will need to use only functions A, B and C. "Persona 50%" will only need functions B and D. "Persona 25%" will use function C only. The design challenge for the functions, interfaces, complexity then becomes how to develop a single application that can be widely used by all four personas. "Many to one" = many personas lead to one application that all can use.

Personas in Experience Management

Continuing the example… once the single custom application has been developed and deployed, we face the opposite situation described above. It is now a "one to many." The one application has been designed to be used by many (i.e., a wide population of most if not all employees.)

When we survey for experience with this custom application, we will survey a random sample of a subset of the total population to get responses that accurately reflects the experience for all the rest of the population. Once we have all the validated responses, we then need to interpret what those collective responses are telling us about their experience with that single widely used application. This is accomplished now by filtering the responses by organization or roles to gain insights and pattens; not by fictional personas in a made up scenario. The usage is now real people using a real application to do a real job.

The Giarte Amaze survey tool is typical of what filtering is used broadly now when measuring, interpreting and managing experience. As is the case with other survey tools, Amaze has built in capabilities to conduct a census to entire population of all employees or to only a random selection of individuals from that total population. When responses are received and collated, Amaze then provides a means to filter responses by organization or role or both to determine from the "many" who is or which groups are responding in a certain way to support analysis.

Widely Used Custom Application

Entire Population

Randomly Sampled Individuals

Organization

Role
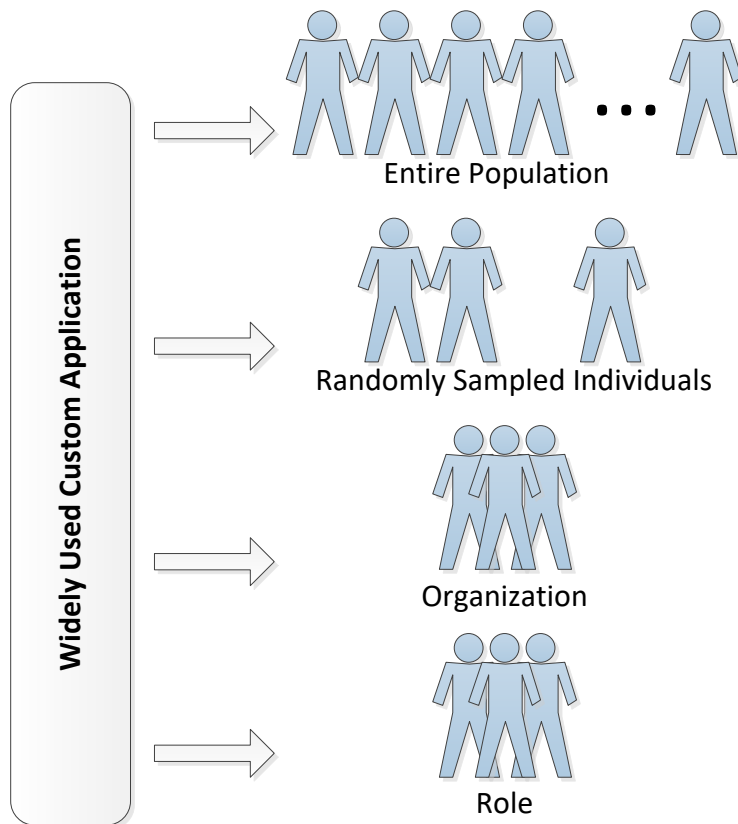
ONE to MANY

This one example custom application is now being used by many employees. So if the XMO sees sentiment dropping for this application over multiple months. The XMO will look for and investigate patterns of commonality in the responses to gain insights on what and why.

The information used to identify which groups are having experience issues is currently determined from the existing service directory, asset databases, and other employee role and organization assignment information that every IT delivery organization on the planet uses and maintains to run an IT operation for a business. All of this existing role and organization filtering information is contained in directory service products like MS Active Directory, Directory as a Service, JumpCLoud, Red Hat Directory, Oracle Directory, and ServiceNow Configuration Management Databases. Persona information is not in there nor used in any operational manner now.

Experience Management Challenges

1. The design for experience problem is completely different than the experience measurement problem so a common solution to both may not be possible
2. How and why to use personas in experience measuring is not clear or obvious
3. We may have a "solution looking for a problem" here
4. Creation & maintenance of personas is difficult at best, requires a diverse team that may not be permanent, and does not lend itself easily to automation or AI yet as there is no track record of process success or benchmarking data to draw upon
5. A "library" for persona data does not exist and invention means potential operational directory issues, privacy and regulatory issues, and maintenance and currency issues due to the dynamic nature of persona & experience
6. We have a solution to manage experience now without personas to at least get started in in measuring, understanding, interpreting, actioning experience gaps

Experience Persona Requirements

As we explore the experience persona idea, the following requirements must also be met:

1. Experience persona need to be able to be used equally in both experience design and management
2. Experience persona need to be easy to define and then characterize a population of people into those personas
3. Experience personas must be easy to maintain, legally compliant, globally and culturally applicable, and able to accommodate dynamic or evolving movements of people and groups assigned across other personas
4. Experience personas must provide meaningful insights beyond groupings like organizations and/or roles we have now
5. Experience persona-based must lead to actionable findings as result of tying experience gaps to experience personas

Conclusion

The idea of experience personas is intriguing conceptually as well as operationally. The answer to what they are and how they can be used in experience delivery and management is not immediately obvious.

The challenges and constraints in existing IT operations and implementations are many. Adding now the complexity and new operational impacts of design for, and then managing, experiences delivered is, and will remain, a daunting yet exciting set of mindset changes and business evolutions for which we are uniquely qualified and capable.

As we proceed to explore this idea of experience personas and possibly go into full development and design, it is imperative that we must consider what outcome we think is possible, and how experience personas will be used beyond just experience design. An academically interesting idea, concept or intention cannot be packaged, sold and delivered.

While it is true that an experience management filtering solution exists for us now, if we can take this idea from concept and abstraction into a practical, meaningful innovation, we will have something unique, differentiating, innovative and even possibly patentable.

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