

Persona Characteristics – To What Extent Are Templates Suitable for Students?

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Abstract

Creating personas is a popular and powerful user centered design method; our current research is based on a collection of persona templates from books, the internet and in-house documents. At the beginning, these templates were structured during an expert workshop, the examples were categorized using the axes “level of detail” and “guidance/flexibility” and four clusters arose. In the next step, the workshop has been analyzed and resulted in a graphical visualization of existing persona variations. The basis for the clusters was besides others the following three elements: description and instruction, layout and arrangement, and personalization and identification. These elements made the comparison of the templates possible. Every template is adjusted to its purpose and use. Therefore, a huge variety of templates is available. At our university, we also have special requirements in order to fit our students’ needs. Two templates turned out to meet those requirements and will therefore be introduced to our lectures.

1 Initial Situation

Personas are one of the most popular and well-known methods around usability, user centered design and user experience design. They help designers to identify, understand and focus on the target group while developing software, services and systems. They can be easily used with templates, which should be self-explanatory, and through this, simple and fast to use. Templates also help the writer to focus on the content by providing a structure.

But there are no universal templates for personas; they need to be adjusted according to individual situations and project specific requirements.

At the University of Applied Sciences Technikum Wien, students of technical degree programs are getting trained in using simple usability and user centered design methods to make their products user-friendly and easy to use. Besides paper prototyping, mock-ups and usability testing, personas are also taught. Therefore, one particular template has been used for the last years; because the results through this were quite satisfying, the template has not been questioned and discussed. Two different examples, designed with the same template, are presented. This should give the students an introduction to how a finished persona can look. The template contains a picture, the name and age, two full-text paragraphs about working life and a few technical habits. Using the examples, mandatory and optional fields are explained. The students are encouraged to choose a template fitting their needs; they may explore books and the internet to do so.

What are personas?

Personas are fictional but realistic users of a system, represented through a picture, personal attributes, likes/dislikes and abilities. “With personas, everyone can talk about the users as specific people with particular needs, wants, desires, skill levels, and contexts of use. And when several personas are created, everyone can see the differences among them” (Barnum 2011: 94). Instead of thinking about abstract user groups the development team and all project stakeholders focus on individuals and develop empathy for them. Especially for developers this is crucial, since they are often “too far away” from actual users (cf. Long 2008; Billestrup et al. 2014). Data of personas should be based on already known user characteristics by customers if possible including marketing, sales, customer support and public relations (cf. Nielsen 2012: 10–11). Up to three personas with individual needs and requirements can be reasonably used, as soon as more than three primary personas arise, the development team should rather create separate interfaces (cf. Cooper 1999: 123–138). Ideally, the content of one persona fits on a single page in order to make it short, concise and easily comprehensible. A common way of memorizing all the personas of a project is to print them out and pin them onto the team’s blackboard.

The idea of personas within interaction design was created by Alan Cooper, an American software designer and programmer, who was looking into a way to better communicate with his clients and programmers (cf. Cooper

2008). During the last years a wide range of templates arose, from rough sketches to high definition based on interviews and ethnographic studies to create more detailed characters.

2 Method

We started to collect templates and examples from books, the web and workshops in order to analyze what is used, how the templates differ from each other and which elements are similar. The collected 24 templates were looked at from different angles and visualized in a comparative table by naming the different elements of each template. We looked for similar elements and listed them, so the comparative table, which can be seen in Figure 1, gives an ideal overall overview.

Name	ID	Details/Background	Ziele	Skills	Quote	Hobbies	Motivation	Pain Points
	X	X	X	X				
	X	X	X	X				
	X	X	X	X	X			
	X	X	X	X	X			
	X	X	X	X			X	
	X	X	X	X			X	
	X	X	X	X	X	X		X
	X	X	X	X				

Figure 1 In a comparative table, elements were listed to find similarities

In further consequence, a workshop was held to discuss the collected data and the outcome. All templates were printed out and spread out on a big table. The workshop participants were four men and one woman – including two computer science students from elective usability courses and three usability experts, all having different knowledge and expertise and therefore a different point of view on the topic. The facilitator first introduced the topic and purpose again to everyone after giving a short introduction to every template, so everyone had the same knowledge level. One of the usability experts quickly took the lead in sorting the printed templates into a horizontal line to get a better overview and structure. The facilitator, who was at the same time also a participant, asked additional questions to refine discussion around

where to position the different templates. She also mentioned different possibilities to structure and to make the participant rethink and discuss the templates; one structure is shown in Figure 2.



Figure 2 Structuring the persona templates in the workshop

Throughout the discussion, a graphic emerged to visualize the relationship between the persona templates. The challenge was to define the axes, because this would have had the most influence on the outcome and on how to further proceed with the visualization. In the end, “*level of detail*” and “*guidance/flexibility*” were chosen, which put an interesting twist onto the outcome. The workshop took about two hours and during the process pictures of significant scenes and actions were taken.

3 Results

The workshop was a great tool to get familiar with the different templates, share each other’s experiences with personas and, through this, compare them. Setting the goal to design, a graphic especially intensified the discussion around personas, developing it further and making it more concrete. Having the persona templates printed out helped to literally move them around on the table and change the position while discussing.

3.1 Templates are formed around the elements

Elements included in the analysis have direct influence on how the persona can be filled out, created and perceived by the rest of the team. For example, one important element is about *descriptions and instructions* within every box. On one side, questions like “What are the main responsibilities in his job, what is expected?” give a clearer idea of what is expected than “professional everyday”. On the other side, they take away room for interpretations. But the experience with students show that especially in the process of getting to know and learning the method, guidelines and descriptions help to focus and increase learning. Another valuable element is the *layout and arrangement* of text boxes on the pages, which is directly connected to the size of the boxes. A bigger field indicates more space and, through this, more text. Bullet points in the box indicate keywords instead of full sentences and a detailed text. We experienced that more text boxes give a better overview than three or four big boxes on one page, as an example shows in Figure 3. Additionally, more text boxes can cover different content and ideas. This does not mean that the more boxes the better, because at some point, the overview and clarity can be lost and the page just looks filled up and packed.

ROMAN'S PERSONA TEMPLATE pichler consulting

 PICTURE & NAME	 DETAILS	 GOAL
What does the persona look like? What is its name? Choose a picture and a name that are appropriate and that help you develop sympathy for the persona.	What are the persona's relevant characteristics and behaviours? These may include demographics, job, lifestyle, spare time activities, and common tasks.	Why would the persona want to buy or use the product? What problem should the product solve? What benefits does the persona want to achieve?

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Figure 3 Simple template consisting of three big boxes¹

¹ <http://www.romanpichler.com/tools/persona-template/>

Another relevant element included in all templates is about *personalization and identification*. This is done by a picture and a name. One difference can be found in how the templates integrate a picture of the persona. Mostly there is an own box used, where an example picture or placeholder is placed. But even this placeholder can give ideas of what is actually wanted. As the small collection in Figure 4 shows, the variety is quite big.

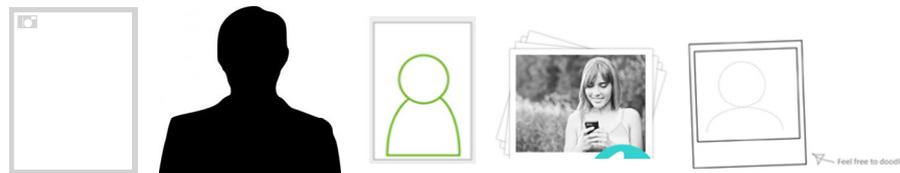


Figure 4 How the picture is illustrated in different templates

In the first picture, the camera indicates, that a real picture of a person should be used. The second picture is not clear anymore, the third and fifth one are pretty similar. The graphic could indicate either a comic or avatar or a real person's picture. One big difference between those two is that the last picture has a small description text. This text tells to "feel free to doodle". By googling doodle, many hand drawn pictures and illustrations are displayed. So does this now mean that there should be a hand drawn person or graphic inserted? At the same time the outside indicates a Polaroid frame, which is made using a Polaroid camera and contains a real picture. In those three examples, there is a lot of room for improvement to illustrate in the way that is understandable by everyone. In the fourth picture, it's much clearer what should be inserted, because it even includes an example.

One more factor about content is the number of elements within a template. Looking at the comparative table, one significant thing can be pointed out: not every template has the same content. While every template has at least a name, a picture and background information included, elements like goals, skills, hobbies, pain points, motivation and quotes are not that common, only about half of the templates include these items. They describe the persona in more detail, but not all information is always needed depending on domain and system environment. That is also a reason why there are so many templates and are still being developed.

The factors mentioned above set the ground for analysis and comparison. In the workshop these elements built the basis of the discussion and the basic structure of the different templates within the visualization. The graphic

which shows the end result is displayed in Figure 5. In this graphic the different templates are displayed in a very miniature way. The graphic is designed in a way that four clusters appear.

3.2 The four clusters

Four clusters arose around various templates; this can be explained through the different fields of applications and the different stakeholders' positions. One example from each cluster and the different characteristics are going to be analyzed and explained in more detail. If a template is, for example, used in a design agency, where graphics, colors and typography are also important factors, the persona may look differently than the one created by a team of non-designers. This results in very different looking templates.

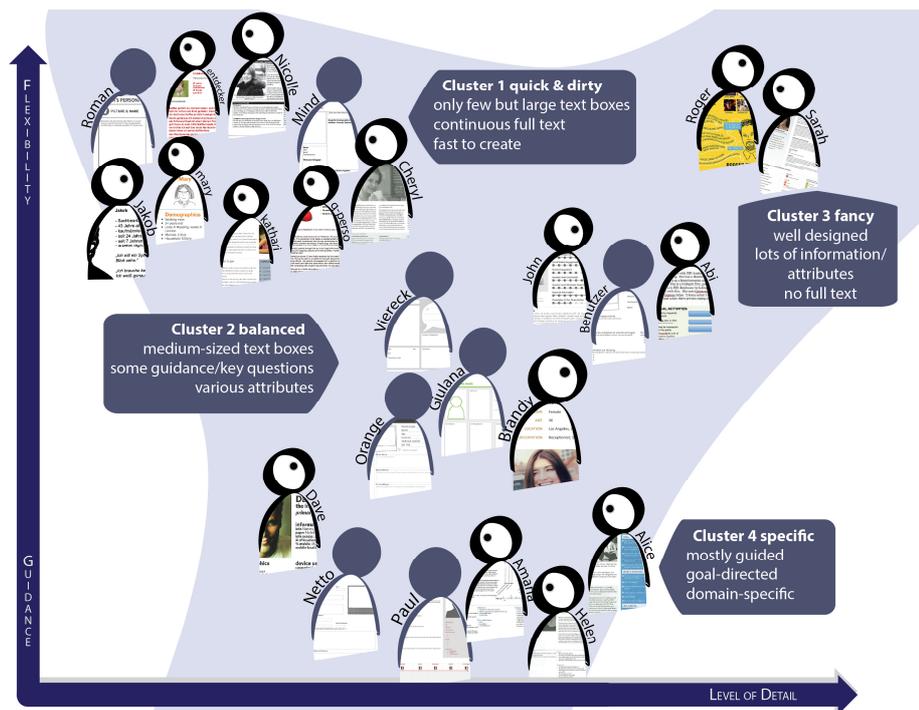


Figure 5 Visualisation of the four clusters

Figure 5 shows all the analyzed templates in a structured order. Both templates without content and already filled in templates are shown. It can be reasonably concluded how the templates of the already filled out would look

like, because they either include a description within the template or a description separate in a book or at the homepage. This difference has been also indicated in the graphic through a different design, the templates without content as the ones with an “anonymous” grey head, and the filled in templates are the ones with an eye. The horizontal axis is “level of detail” and describes the detail of the template, which influences the understanding and the filling in of the template. The vertical axis is “guidance/flexibility”; flexibility leads to only a few descriptions, which leaves content up to the person designing the persona, and at the same time it can also be quite unstructured and wide, guidance helps narrowing down the content to what is really necessary and helpful: all that can be especially supporting for beginners.

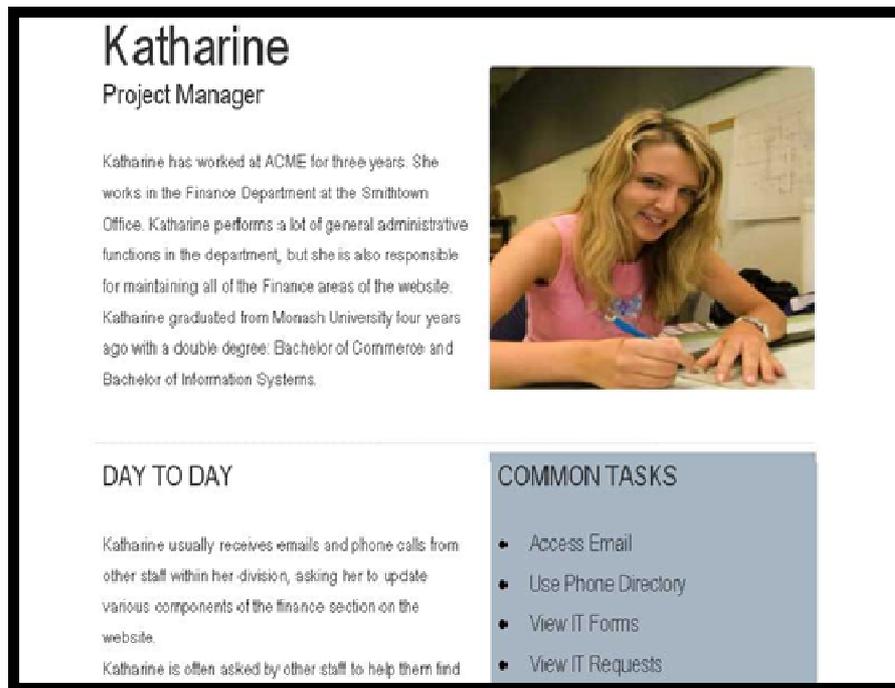


Figure 6 A section of the persona – Katharine – from the first cluster²

The first cluster is characterized through a low level of detail and a high amount of flexibility. It can also be explained with a small amount of boxes and no guidelines. If a person experienced in personas is using this template,

² <http://www.suzeingram.com.au/2008/12/persona-template-microsoft-word-version.html>

these things can be an advantage, because he or she knows what to focus on, what content is important and that he or she can be quite fast filling them out. An example is shown in Figure 6. However, this can quickly turn into a disadvantage when there are no guidelines and only a few big boxes. Through research, interviews and ethnographic studies, many information got collected and it is hard to narrow that down, which can results into filling out the boxes with as much information as possible. More text in boxes makes the persona look overwhelming and packed with information, resulting in less handy and less easy to use method.

Figure 7 A section of the persona – Benutzerzentrale – from the second cluster³

The second cluster is characterized by its balance and evenness. It is placed right in the center of flexibility and guidance, which means that there

³ <http://www.patric-schmid.de/benutzerzentrale/blog/2012/08/09/persona-template-fur-software-usability/>

are guidelines present to actually support the person: the questions are stated in a way to be fast and easy to answer as the template shows in Figure 7. Also, the smaller boxes give additional guidance by limiting the space and the amount of text. In combination, this results in a concise persona. The structure of the boxes makes a good arrangement and is able to cover different topics and content. This gives at the same time a wide spectrum and high details on the persona, while it is fast to fill in through the guidelines and questions.

The third cluster is the one in the upper right corner, characterized by a high level of detail and flexibility. The templates from this cluster have an interesting design, are working beyond others with colors, logos, pictograms and highlighting as you can see in Figure 8. But through the high grade of graphic design, there can be a lot of working with adjustment coming up.



Figure 8 A section from the persona template – Roger – from the third cluster⁴

The fourth cluster is orientated with a specific goal or content, for example business. The questions are very specific and narrowed down to that one goal. Within its use case, the template can be a great support to visualize findings and information.

⁴ <https://www.flickr.com/photos/niegeborges/6720162139/in/photostream/>

3.3 *What suits our requirements?*

As a final result, the templates, which are suitable for our requirements, are discussed and explained. They will be offered to our students to guide them through the process. Also, the presented examples are going to be completely revised and adjusted, which could raise the professionalism of the personas created by the students.

Our requirements can be explained by the following points:

- Personas are usually introduced in the course in an early state as students need as much support as possible because they are new to the whole idea of user centered design and usability. This is one of the reasons why one of the important elements in the template is around the descriptions. The students' task will be, after personas got introduced in the course, to create an own persona as homework by themselves. Giving them a template with an included instruction will make it easier for them to get started and knowing what the important aspects of personas are.
- Another important point is about the design. The design should be simple and easy to understand. Our computer science students are not yet very familiar with designing and software used to design. That element makes it easy for them to complete their task and concentrate on the filling in of the template and its content.
- To show the diversity of personas, a set of completely different examples should be created and presented to students. It is important to keep in mind that people have individual needs and abilities, which should be considered during design and development.
- Archetypes and stereotypes should be chosen carefully: on the one hand, they make it easier to empathize with “known” types of people. On the other hand, it is important to avoid prejudice and keep an open mind about people's behavior. The last thing personas should do is offend customers.

4 **Future Ideas**

Future ideas are primarily about the implementation of the research in actual teaching. In different courses, personas will be part of the script, starting with a method description and an exercise. This can lead to a positive development of the handed-in personas from the students. Those results will be noted, compared and, in a further consequence, analyzed.

Furthermore, there is the idea to bring together what belongs together, personas and scenarios. Scenarios build the context and story, where the persona gets “alive” and needs to act in different tasks designed to find right directions for interaction and content decisions (cf. Bødker 2000). Thereby, the tasks should be more abstract than based on a particular use case. One experiment could be to test different templates in connection with scenarios; another way could be to experiment with different ways of designing a scenario.

Another interesting point we found out through this research is the variety about the picture. Pictures are the most important factor to memorize a persona and create empathy. And there are many opportunities of choosing right pictures: a portrait picture, a smiling person, a natural look, only the head, the complete body, while the person is doing something, only standing ... Based on other studies covering this topic, that could be an interesting way to build up research.

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