

PERSONAS AND USAGE SCENARIOS EXPLAINED



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Akendi

End-to-end experience design



At Akendi, we take user research as a first step in the creation of effective designs. Part of this user research is the study of your user segments: the personas.

For most projects we take the understanding of the organisation and create between 5-10 usage scenarios to capture the intended and envisioned use of the website, product or service. The usage scenario will have a description of a persona from a user segment their main tasks, environment and usage goals.

Personas

A persona is a stand-in or proxy for a unique group of people who share common goals and needs with respect to the use of a product, website or service (the experience). For a typical website, product or service you usually have between 2-8 persona definitions. These users are not “average” users but specific characters with names, personalities, faces, personal backgrounds, families and, most importantly, usage goals.



Each persona has a link to user research data that is based on primary user research (field research: contextual inquiry, job observation). At the same time, persona characteristics can encompass those people in widely different demographic groups who do have similar goals. This differentiates the persona from a market segment or demographic; what defines personas are the common usage goals.

You can have user personas, organisation personas, customer personas, service personas, etc. These personas are created to help focus the design of an experience. This is done through:

- 1) reminding the creators of the experience that they themselves are not the target audience and,
- 2) that design options and decisions need to be discussed and validated by putting the personas front and centre.

Personas) Approach

Usually there is a some knowledge in an organisation already about who the users are, what they do and what the context of use is for these users. And if the organisation hasn't done any external user research yet or the project boundaries don't allow for a greater effort, it is recommended to start with the internal stakeholders of the project to create personas.

Sometimes the relevant user research information is anecdotal in nature, not really captured in a more formal way or quite dispersed among various people in the organisation. So to tease out that knowledge requires a number of interviews or workshop sessions with individuals that have (had) experience in client facing roles. Client facing includes both outside customers/users of the service or product, but inside to the organisation as well. For example: front desk staff, support staff, managers, web managers, content matter experts, (internal) consultants, outreach, marketing and sales staff.

In an interview or workshop session, we would start with the question: "who, in your view, are your users?" and from there start to capture and build the overview of all personas that can or should be distinguished for the purposes of the design. After an initial inventory, we could end up with 25 distinct personas after which we will narrow it down to a more manageable number by determining how different the usage goals are of each persona and why it is important to distinguish that particular persona.

In a workshop session we would use a mix of group discussion and small group exercises to arrive at the desired outcome. The gathered information is captured in a way to promote integration of the results in the design. At minimum in PowerPoint slides, but this can also range from a large poster, pages on the internet to presentations or other fitting means to make all stakeholders aware of the insights. An important part of this phase is to stimulate the ongoing communication among stakeholders regarding the end users.

After the interviews and/or workshops, it can be determined if the validity of the information is high enough to go to the design phase or whether there is a need for additional field research.

Usage Scenarios

The creation of usage scenarios builds on the persona work. Once it is known who the users are, the next step is identify, capture and research what these users do and where. The level of detail that is uncovered at this stage is critical to help guide the design and overall requirements for the product or service. A usage scenario will demonstrate the relationships between the individual tasks/activities that the user has to do and the impact of the environment to reach their intended goal (e.g. find out about types of services, fill in the right information in the form in order to get the right information).

The environment or context of use is an important and often overlooked part of the usage scenario. There are several dimensions to a context of use: job characteristics, organizational structures and physical space attributes. Some example context of use aspects are:

- whether the user is under any time constraints while using the product,
- is their boss requiring the result in an email,
- is the team they work in spread across the continent,
- would they work in a cubicle, outside,
- would the lighting condition change at all, etc.

Each usage scenario will be captured as a description following 'a-day-in-the-life-of-user R'. It will outline the experience of a user doing several tasks in a context of use. A usage scenario description can also include tangible elements like prototypes or parts of a website, product designs, and printed materials. We will endeavour to create rich usage scenarios within the project constraints.

Usage Scenarios) Approach

As with personas, the usage scenario creation typically starts with using internal resources for the creation of scenarios. This is a best practise if the organisation hasn't done any external user research yet or the project boundaries don't allow for a greater effort. It must be stressed however that conducting primary field research with end users yields the most reliable source of information. In general, the creation of usage scenarios follows the same approach as that of the personas creation.

Again, here you can have the situation that the relevant user research information is anecdotal in nature, not really captured in a more formal way or quite dispersed among various people in the organisation.

To capture the available internal knowledge requires a number of interviews or workshop sessions with individuals that have (had) experience in customer or client facing roles. Client facing includes both outside customers/users of the service or product, but inside to the organisation as well. For example: front desk staff, support staff, managers, web managers, content matter experts, (internal) consultants, outreach, marketing and sales staff.

In an interview or workshop session, we would start with the question: 'can you tell me how this user would use your product or service?' and from there start to capture and build the overview of all usage scenarios that can or should be distinguished for the purposes of the design. After an initial inventory, we could end up with 15-20 distinct usage scenarios after which we will narrow it down to a more manageable number by determining how different the usage goals are in each scenario and why it is important to distinguish that particular scenario.

In a workshop session we would use a mix of group discussion and small group exercises to arrive at the desired outcome. The gathered information is captured in a way to promote integration of the results in the design. At minimum in PowerPoint slides, but this can also range from a large poster, pages on the intranet to presentations or other fitting means to make all stakeholders aware of the insights. An important part of this phase is to stimulate the ongoing communication among stakeholders regarding the end users.

After the interviews and/or workshops, it can be determined if the validity of the information is high enough to go to the design phase or whether there is a need for additional field research.

Usage scenarios form an excellent communication tool during design and development by creating a shared understanding of the user and their environment.

This understanding will create a clear focus in the design phase on what is most important to the end users of service.

Further User Research

If there is an identified need to do more user research to increase the validity of the information then that could be done in various ways. This would depend on the research questions and time/budget. Some options:

- Conducting additional workshops with other internal stakeholders
- Add (phone) interviews with actual end users
- Conduct contextual inquiry: visiting the end user location and observe their usage scenarios over a longer period of time and more often
- Online survey: this has a more limited application as a user research tool, but a survey can be used to identify other user tasks and to ask targeted questions to validate the persona profiles and parts of the usage scenarios. We typically use surveys more often in other research contexts

About Akendi

Akendi is an end-to-end experience design, research and strategy firm. We are passionate about the creation of intentional product and service experiences — whether those experiences involve software, instrumentation or hardware products interactions. We work closely with you to strategize, research, design, and test all aspects of the product and service experiences you deliver.

Akendi is headquartered in Toronto, Ontario, Canada, with offices in Ottawa, ON and Vancouver, BC.

We serve clients throughout Canada, the United States and Europe.

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