

How We Create Personas in Our Design Thinking Workshops



Background

For our “I Buy Motorcycle” design thinking workshops, we conducted 15 customer research interviews. Then in our workshop sessions, we broke into 3 teams (of 4-5 people each) to develop personas. Each team developed a primary persona and a secondary persona.

First, we developed a primary persona, and then presented our personas to the other teams. For example, our team created the Ozzie persona. There was quite a bit of overlap among the 3 teams, especially around Goals and Frustrations. The primary persona was older (40+), rode cruiser bikes like Harley Davidsons, and was heavily involved in bike riding groups. Our team's secondary persona was younger (mid-20s to mid-30s), had a need for speed, was an aggressive driver, and was less involved in groups and more involved in riding with a few friends.

To arrive at our primary persona, all 3 teams posted their personas in a meeting room. Then we used power dots to vote on the one persona for which we wanted to develop our MVP (minimum viable product). The Ozzie persona was the winner.

Designing for one primary and one secondary persona has worked best, for us because we can cover the most important use cases that way.

What is a Persona?

A persona represents a segment of users who show similar behaviors in their research and purchasing decisions, use of technology, customer service preferences, and lifestyle choices. Attitudes, frustrations, goals, and motivations are common to a

persona regardless of age, gender, education, household income, and other typical demographic criteria.

There are two types of personas: data-driven personas, and lean (or proto-) personas. For our research, we focused on lean personas. Here's a great quote that gets to the heart of what a lean persona is:

“Besides putting the customer front and center, proto-personas serve two key purposes: Shared understanding, and remembering we are not the user.”
– Jeff Gothelf and Josh Seiden, *Lean UX: Designing Great Products – with Agile Teams*

Lean personas are the output of short, collaborative research interviews with customers (ranging from five to 30 participants) and stakeholders working together as active observers. They typically take two to four weeks to develop. Lean personas are ideal for Agile projects where time and rapid product development are key criteria.

Why Use Personas?

A persona is a way to model, summarize, and communicate research about people who have been observed and interviewed. A persona is depicted as a specific person but is not a real individual. Instead, a persona is created from observations of a subset of people – in our case, from 15 participants we interviewed. Personas help teams design for a specific somebody, rather than a generic everybody. We can't design for everyone, or else we risk designing for no one.

Personas help teams build empathy and focus on a clear target (who we are creating the software for) and make and defend design decisions from a user's perspective. They also establish a medium for shared knowledge to stakeholders who were not able to observe the customer research interviews in person.

Pros of Lean Personas

- Short completion time (2-4 weeks)
- Inexpensive
- Conducted collaboratively, reducing the risk of a knowledge gap
- Ongoing and editable, as assumptions are continually tested and reframed

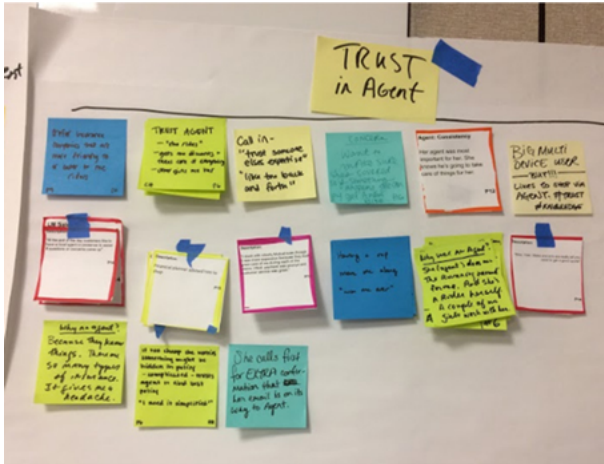
Cons of Lean Personas

- Based on small-scale, qualitative research
- Does not typically produce statistically significant data

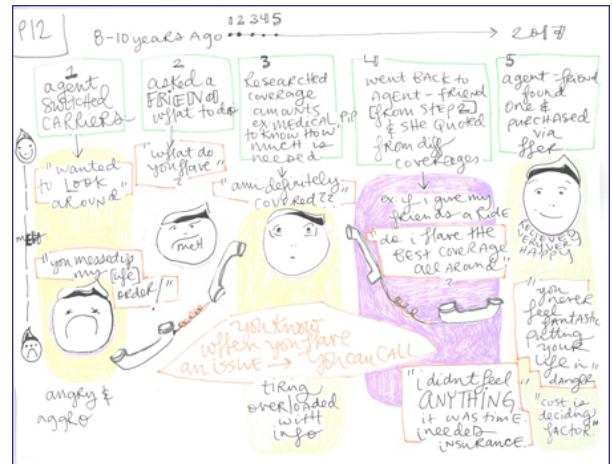
How We Developed Our Personas

We divided into three teams of four to five people. Each team was first tasked with reviewing artifacts from our customer research interviews, which included categorized issues, journey maps, empathy maps, and sketch notes. We had one

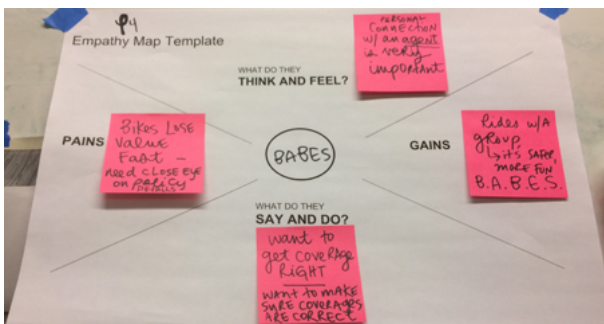
entire room filled with these artifacts from our 15 participants. Here are some examples:



Categorized Issue ("Trust in Agent")



Journey Map



Empathy Map



Sketch Notes

Next, we created primary personas using a persona template that we have developed. Typically, the Goals and Frustrations are the most important criteria in building a persona, and the Background (User profile) is least important.

Persona Template

NAME _____ **DESCRIPTION** _____

Optional persona sketch

BACKGROUND: User profile

CURRENT BEHAVIOR
Defines who the story is about. This main character has attitudes, motivations, goals and pain points.

COMMUNICATION DURING INSURANCE PROCESS

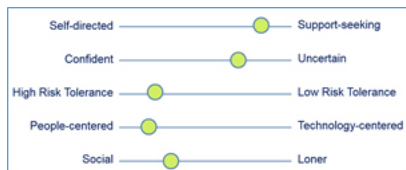
Goes online to research insurance	_____
Goes online to get quotes for insurance	_____
Calls insurance agent	_____
Desired amount of personal guidance	_____
Likelihood to use technology	_____
Desired granularity of information	_____

GOALS
What is s/he trying to accomplish when they park?

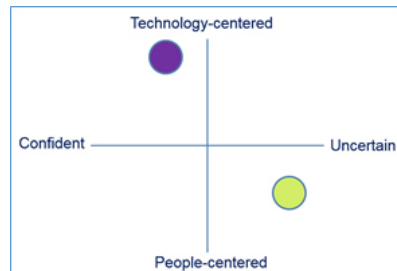
FRUSTRATIONS
What is difficult in the current situation?

Team members spent 15 minutes completing the templates individually before working together to reach consensus on a primary persona. Each team then presented its persona to the other teams, answering questions and receiving feedback.

Next, we created matrices along which we thought our personas lied. Teams first discussed what matrices would best represent our personas, such as Confident versus Uncertain or People-centered versus Technology-centered. Teams then selected their final two matrices (horizontal and vertical) and plotted their personas on them.

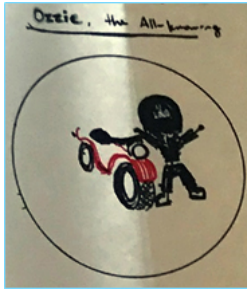


Individual matrices



Final matrix

By now, you're probably wondering what one of these personas looks like. Look no further! Below are some artifacts for "Ozzie," the persona we voted to be the primary persona for which we would create our product.



Ozzie sketch



Ozzie quote and matrix

Ozzie's mantra is "Ride or die... just don't die." On the horizontal matrix from "Support Seeking" to "Self-Directed," Ozzie is very self-directed. This means he will want to do things himself, such as get an insurance quote online as opposed to asking an insurance agent to do the quote for him. On the vertical matrix from "High Risk Tolerance" to "Low Risk Tolerance," he has very low tolerance for risk. That is, he seeks protection and safety to mitigate the dangers inherent in motorcycle riding. This is in line with what we discovered during our customer research interviews.

So, now that we have a persona – what's next? See ["How We Create Customer Journey Maps in Our Design Thinking Workshops."](#)