



Engaging Personas

Engaging personas are designed so that the designers who use them can become more engaged with them. The idea is to create a 3D rendering of a user through the use of personas. The more people engage with the persona and see them as 'real', the more likely they will be to consider them during the process design and want to serve them with the best product. These personas examine the **emotions** of the user, their **psychology, backgrounds** and make them relevant to the task in hand. The perspective emphasises how **stories** can engage and bring the personas to life. One of the advocates for this perspective is Ph.D and specialist in personas, Lene Nielsen.

10 steps to Creating Your Engaging Personas and Scenarios

Engaging personas can incorporate both goal and role-directed personas, as well as the more traditional rounded personas. Engaging personas emphasise how stories can engage and bring the personas to life. This 10-step process covers the entire process from preliminary data collection, through active use, to continued development of personas. There are four main parts:

- **Data collection** and **analysis of data** (steps 1, 2),
- Persona **descriptions** (steps 4, 5),
- **Scenarios** for problem analysis and idea development (steps 6, 9),
- **Acceptance** from the organisation and **involvement** of the design team (steps 3, 7, 8, 10).

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The 10 steps are an ideal process but sometimes it is not possible to include all the steps in the project. Here we outline the 10-step process as described by Lene Nielsen in her Interaction Design Foundation encyclopedia article, Personas

(https://www.interaction-design.org/literature/book/the-encyclopedia-of-human-computer-interaction-2nd-ed/personas#heading_Four_different_perspectives_page_12414).

- 1** | *Collect data.* Collect as much knowledge about the users as possible. Perform high-quality user research of actual users in your target user group. In Design Thinking, the research phase is the first phase, also known as the Empathise phase.
- 2** | *Form a hypothesis.* Based upon your initial research, you will form a general idea of the various users within the focus area of the project, including the ways users differ from one another – For instance, you can use Affinity Diagrams and Empathy Maps.
- 3** | *Everyone accepts the hypothesis.* The goal is to support or reject the first hypothesis about the differences between the users. You can do this by confronting project participants with the hypothesis and comparing it to existing knowledge.
- 4** | *Establish a number.* You will decide upon the final number of personas, which it makes sense to create. Most often, you would want to create more than one persona for each product or service, but you should always choose just one persona as your primary focus.
- 5** | *Describe the personas.* The purpose of working with personas is to be able to develop solutions, products and services based upon the needs and goals of your users. Be sure to describe personas in a such way so as to express enough understanding and empathy to understand the users.
 - You should include details about the user's education, lifestyle, interests, values, goals, needs, limitations, desires, attitudes, and patterns of behaviour.
 - Add a few fictional personal details to make the persona a realistic character.
 - Give each of your personas a name.
 - Create 1–2-pages of descriptions for each persona.

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- 6 | *Prepare situations or scenarios for your personas.* This engaging persona method is directed at creating scenarios that describe solutions. For this purpose, you should describe a number of specific situations that could trigger use of the product or service you are designing. In other words, situations are the basis of a scenario. You can give each of your personas life by creating scenarios that feature them in the role of a user. Scenarios usually start by placing the persona in a specific context with a problem they want to or have to solve.
- 7 | *Obtain acceptance from the organisation.* It is a common thread throughout all 10 steps that the goal of the method is to involve the project participants. As such, as many team members as possible should participate in the development of the personas, and it is important to obtain the acceptance and recognition of the participants of the various steps. In order to achieve this, you can choose between two strategies: You can ask the participants for their opinion, or you can let them participate actively in the process.
- 8 | *Disseminate knowledge.* In order for the participants to use the method, the persona descriptions should be disseminated to all. It is important to decide early on how you want to disseminate this knowledge to those who have not participated directly in the process, to future new employees, and to possible external partners. The dissemination of knowledge also includes how the project participants will be given access to the underlying data.
- 9 | *Everyone prepares scenarios.* Personas have no value in themselves, until the persona becomes part of a scenario – the story about how the persona uses a future product – it does not have real value.
- 10 | *Make ongoing adjustments.* The last step is the future life of the persona descriptions. You should revise the descriptions on a regular basis. New information and new aspects may affect the descriptions.

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Sometimes you would need to rewrite the existing persona descriptions, add new personas, or eliminate outdated personas.

Lene Nielsen's poster (on the next page) covers the 10step process to creating engaging personas which participants are the most likely to find relevant and useful in their design process and as a base for their ideation processes.



10 Steps to Personas

Based on the method "Engaging Personas and Narrative Scenarios" by Ph.D. Lene Nielsen

1. Finding the Users



Questions asked
Who are the users?
How many users are there?
What do they do with the system?

Methods used
Quantitative data collection

Documents produced
Reports

2. Building a Hypothesis



Questions asked
What are the differences among the users?

Methods used
Analysing the material
Grouping the users
Identifying, naming the groups

Documents produced
A draft description of the target groups

3. Verifications



Questions asked
Data for Personas:
• likes/dislikes • inner needs • values
Data for Situations:
• area of work • work conditions
Data for Scenarios:
• work strategies and goals
• information strategies and goals

Methods used
Qualitative data collection

Documents produced
Reports

10. On-going Development

Questions asked
Does new information alter the personas?

Methods used
Usability tests, new data collection
Feedback regarding users from all those interacting with them e.g. sales, support, trainers

Documents produced
Foundation document

4. Finding Patterns



Questions asked
Does the initial grouping hold?
Are there other groups to consider?
Are all equally important?

Methods used
Categorization

Documents produced
Descriptions of categories

9. Creating Scenarios



Questions asked
In a given situation, with a given goal, what happens when the persona uses the technology?

Methods used
The narrative scenario - using personas, descriptions and situations to form scenarios

Documents produced
Scenarios, use cases, requirements specifications

8. Dissemination of Knowledge

Questions asked
How can we share the personas with the organization?

Methods used
Posters, meetings, e-mails, campaigns of every sort, events

7. Validation and Buy-in

Questions asked
Do you know someone like this?

Methods used
People who know of the personas read and comment on the persona descriptions

6. Defining Situations

Questions asked
What are the needs of this persona?
What are the situations?

Methods used
Analysing data for situations and needs

Documents produced
Catalogue of needs and situations

5. Constructing Personas



Questions asked
• body (name, age, picture)
• psyche (extrovert/introvert)
• background (occupation)
• emotions and attitudes (towards the technology, the company (sender), the information)
• personal traits

Methods used
Categorization

Documents produced
Descriptions of categories