Persona family planning

WHAT IS FAMILY PLANNING FOR PERSONAS?

Family planning is the first phase in your persona process. It is the time when you will do some investigation and strategic thinking about your organization and its approach to user-centered design (UCD) and development. Your personas will not be introduced to the rest of your organization until the *birth and maturation* phase, but the ultimate success you have with them depends a lot on the work you do during the family planning phase. It is critical that you use this time to think up front about what happens after the personas are created.

There are four major activities during the family planning phase:

- Building a core team
- Researching your own organization (organizational introspection)
- Creating an action plan
- Collecting data

In this version of our book, we introduce the basic steps you should complete during the family planning phase. As you'll see, much of family planning is about thinking, planning, assessing, and gathering materials. For more detailed suggestions related to family planning, see the related chapter in *The Persona Lifecycle: Keeping People in Mind During Product Design.*

ORGANIZATIONAL INTROSPECTION: ARE PERSONAS RIGHT FOR YOUR PROJECT?

Your first job is to take a realistic look at the problems your team and organization are trying to solve and decide if personas will help. Don't skip this step to save time, even if your team needed personas a month ago. We define *organizational introspection* as the process

of evaluating the problems and needs of your company, organization, and product team. Organizational introspection is, in simple terms, working to answer the following questions:

- How user focused is your company?
- How do people think and communicate about users?
- How is user information incorporated into the product design and development process?

Do a thorough job in examining the personalities and politics that surround you. Only then can you decide if personas are the right way to address the problems facing your organization and product team and, if so, how you should introduce and maintain the personas to ensure maximum acceptance. If you conclude that personas are appropriate for your team, process, and product needs, you will then be ready to assemble a team, create a plan to ensure that your personas will be used and found helpful, and begin collecting data.

STEP 1. BUILD A CORE TEAM

Even if your team is just you and one other person, the discussions you will have will provide you with a critical perspective on your work and on the decisions you are making that you simply cannot arrive at by yourself. You need a persona core team because:

- Personas can be a lot of work for just one person.
- Discussion and debate are critical activities in the persona creation process.
- Getting your personas accepted and used requires cross-organizational buy-in.

In most cases, we have found that effective persona core teams include a minimum of two and a maximum of ten members. In our experience, teams with over ten members require too much coordination and quickly become unmanageable. The ideal persona core team has three to five active members and several other members in an advisory or on-call role.

Plan to include the people who are already involved in user research, market research, business analysis, task analysis, or any other user- or customer-focused research or profiling activity. If you have colleagues in any of the following specialties, you should put them on the short list for inclusion on the core team:

- Information architects, interaction designers, and human–computer interaction (HCI) specialists
- Usability specialists, user researchers, and ethnographers
- Technical writers, documentation specialists, and training specialists
- Market researchers, business analysts, and product managers

STEP 2. IDENTIFY GOALS

One of your jobs, as a user-centered designer, is to help build focus in your organization. Personas will help you to do this, but they aren't the only tool at your disposal. Before you dive head-first into creating personas, you should do everything you can to articulate (and get sign-off on!) a very specific set of goals. These goals will help you keep your executive team on track during the adulthood phase of the lifecycle, and they will help you measure the success of the project.

We recommend this (deceptively simple) set of questions:

1. What are the top three to five business goals for your product or service? Business goals are expressed in numbers. They describe the needles that this project should help to move. A statement such as "increase revenue and decrease costs" isn't specific enough

to be a useful goal. Instead, ask for extremely specific numbers—for example, "increase number of purchases on our website by 20%" or "decrease number of customer service calls related to returns by 50%."

2. What are the top three to five brand goals for your product or service? Brand goals are expressed in terms of the way you want the new product or service to articulate, advance, or modify the perception of your brand.

3. What are the top three to five user experience goals for your product or service? Customer experience goals express the problems you want your site to solve for your customers. Try writing these as quotes you would like to hear coming out of your users' mouths after they see your new product or service—for example, "Wow, I didn't know that I could find information about all of my accounts in one place!"

4. What are the most important differentiators for your product or service? What are you offering your customers that no one else can? Remember, these really need to be different. It's not enough to say, "We have the best customer service in the industry." That's too vague, and it's not really defensible.

5. What are the most important value propositions for your product or service? Why should your customers care about your differentiators?

You'd think that any business would have a list of all of these available to anyone who asks. Maybe your company is different, but we have never encountered any company that could just hand over the answers to these questions on request. Remember to approach this carefully. Your role is not to challenge the executive team or accuse them of being disorganized. Instead, let them know that it's your job to *understand* what these goals are and to ensure that everyone working on the project is crystal clear on the most important goals for the company.

We suggest you try to find these types of goals in documents available to you or that you draft what you *think* the goals are. Ask your boss, and your boss's boss, to correct any misunderstandings you have.

Creating clear goals now will help you measure ROI later

Measuring the ROI of the overall project is very important; it's also important to measure the ROI of the persona effort itself. Personas aren't free. They cost time and effort and, in many cases, at least a little bit of money. Doing a little thinking now can set you up very well to measure the value of the personas to the overall project once everything is said and done.

There are several ways your personas can help, and each of these can be measured:

- Personas can help improve your process; for example, personas can help your teams communicate more effectively, agree on and document design decisions, or achieve resolution on key issues faster.
- Personas can help improve your products; for example, your products can (and should!) suffer from fewer bugs and require less support and user-facing documentation.
- Personas can help improve your organization; for example, personas can ease political disputes, improve internal communication between departments and from the executive teams, and even noticeably increase the overall customer focus of the entire company.

You'll see that the ways to measure change aren't necessarily numeric (in fact, they are seldom numeric). But, you'll find that it certainly is possible to think about the way things are today, how we want things to be, and what things will have to change in order to make that dream come true. Not all measures of ROI have to be expressed in numbers. See Table 3.1 for a sample Persona Effort Goals Worksheet.

TABLE 3.1 Persona Effort Goals Worksheet

Goal or issue	How things are today	How we want things to be tomorrow	Ways to measure change
Use personas to create a clear, shared focus across the entire organization. (Or state another process, product, or organizational improvement goal or issue.)	We're just getting started, so we're still driving to clarity on exactly who our target users are and the relative business value of each.	We want a set of personas that everyone knows and business goals for each release or project articulated in terms of personas' needs.	After the first release, ask everyone to describe the three most important users. Collect current business and vision documents—note the ways users are referenced. After the persona effort, all documents should reference the personas. (Before beginning this process, we should have asked everyone to describe the three most important users of the product or service.)

Family Planning: Create a plan	Lifetime Achievement: Measure ROI
What resources do we have for personas and other UCD activities?	How much did the persona effort actually cost?
What product problems do we want to solve with personas?	Has the product improved? How much, and in what ways?
What process problems do we want to solve with personas?	Has the process improved? In what ways?

FIGURE 3.1
Measuring the return on your persona-effort investment is much easier if your plan includes specific references to the improvements you hope to realize. If you create your action plan to explicitly cover the questions on the left-hand side of the table shown here, you will thank yourself during the lifetime achievement and retirement phase.

STEP 3. CREATE AN ACTION PLAN

The action plan is a translation of all of the analysis you have done into a roadmap or specification for your persona effort. Although they can be of different formats, all persona action plans incorporate the following:

- A definition of the scope of the project and the associated goals for the persona core team
- A description of a communication strategy
- A listing of milestones and deliverables

If you know you will need to explain the value of your persona-related work at the end of your project, create your action plan to explicitly answer the questions on the left-hand side of the table shown in Figure 3.1. Figure 3.2 shows a generic action plan and how to detail milestones and deliverables.

Note that you will be able to use your action plan to assess the value of your persona effort during the lifetime achievement and retirement phase by measuring the changes that result from your work.

STEP 4. GET YOUR HANDS ON SOME DATA

During the family planning phase, your goal is to figure out what your data sources should be and to collect the raw data. We believe that the best personas come from a variety of

Persona Effort Action Plan

Elevator Pitch

We're going to use personas to help our entire organization stay focused on what our customers need and how they think. The personas will be prioritized by the exec team according to our business goals, so they'll help us with user-focus and with business-focus!

Process-Related Goals for the Persona Effort (if our work is successful …)

- It will take less time to agree on the set of features we'll include in the product.
- We will have a common language around users and business goals, which will make meetings and discussions more effective.
- It will be easier to create QA test plans.

Product-Related Goals for the Persona Effort

- 20% reduction in customer service calls.
- 50% fewer bugs at launch.
- 2% increase in conversion rates for new customers.

Resources Available for Our Persona Effort

List:
- core team members
- person hours available from the core team members
- time available from the advisory members of the core team
- financial resources, etc.

Milestones & Deliverables

Phase	Activities and Deliverables	Timeline	Related Development Cycle Milestones
Family Planning	Include persona-specific work and deliverables during each period (e.g., field research, data assimilation, skeleton personas, communication activities, etc.)	Include the date of completion or expected duration of the activity	Include the broader product or project milestones here to provide context for the plan (e.g., spec complete date, code complete date, release date)
Conception & Gestation	–	–	–
Birth & Maturation	–	–	–
Adulthood	–	–	–
Lifetime Achievement and Retirement	–	–	–

FIGURE 3.2
Your action plan should include a mission or vision statement (which we recommend be in the form of an "elevator pitch"), overall goals, and resources for completing the work. You will also need to detail the milestones and deliverables for your persona project, which we recommend you complete in terms of the lifecycle phases.

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sources, especially those including both quantitative and qualitative data. Further, although we have seen great personas created after an extensive data collection and analysis effort, we have also seen useful personas based completely on assumptions. During this step, we suggest you look for:

- *Existing primary data sources (internal)*—What sources of user and customer data are readily available to you? What are the central and peripheral topics or domains that would be pertinent to your project? What are the other possible sources of data in your company? Who currently owns each data source?

- *Existing primary data sources (external)*—What are the possible external sources of data relevant to your domain, company, or product? Are there institutions or other companies that might have conducted research related to your domain? If you need to purchase such data, do you have the money to do so? We have had great luck finding lots of data on the Internet. Some of it is free, and some you have to pay for, but it's out there.
- *Original primary data sources (doing your own research)*—After seeking out existing data sources, what information is missing? What do you really need to learn? Who do you need to study, and how do you need to study them? In many cases, the remaining need for data is qualitative, as existing external data tend to be quantitative in nature. You'll want to go deep with a few carefully selected participants, observing and interviewing them in their own context to really understand their situations, needs, and goals. This information will also be immensely helpful later in the process as you craft the details of your personas.
- *Secondary data sources*—Who are the subject-matter experts in your company? Who has the most contact with existing customers? Your support organization, sales force, and account representatives can be great sources of information about your users.

Stay organized

As you collect data from primary (both internal and external) and secondary sources, it is a good idea to keep a data source index, which includes a master list of all data sources and a short description of the content of each source. At the very least, each source index should include:

- Name of the source
- Date the data were collected or analyzed
- Where you found the source
- Types of data the source contains—qualitative data, quantitative data, or both? Demographic, psychographic, behavioral, or some other type of data?

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An example of an index is provided in Figure 3.3.

Personas Data Source Index

Category	Description	Date	Author	Source #	Incorp. into Personas?
Kids Online	G4K Market Segmentation	oct 2003	Market research	01	✓
	Wired elementary schools in the Boston area	aug 2003	Persona team	02	✓
	Agency Report: Kids online 2002	jan 2002	Agency	03	✓
	"Kids Count" http://www.aecf.org/kidscount/	2003	Annie E. Casey Foundation	04	✓
	CLIKS online data http://www.aecf.org/cgi-bin/cliks.cgi	jun 2003	Persona team	05	TBD
	Analysphere kids online: privacy and content regulation http://www.analysphere.com/23Apr01/kidz.htm	apr 2001	Analysphere	06	✓
Kids and entertainment	kids entertainment.com	2003	Kid's Entertainment Industry	07	✓

FIGURE 3.3
Create a data source index. Note that this example includes the category for the data, a link to the primary source, the date of creation, author, source number, and a final column for whether and when the source was used in the creation of the personas. You will use the final column during the conception and gestation phase to keep track of which data sources have been mined for their persona-related information.

GET READY FOR CONCEPTION AND GESTATION!

Now that you have a team to help you, you have thought about what problems you want to solve, you have identified goals, and you have gathered up data, you're ready to begin creating personas. Remember, don't skip the steps in family planning; even spending just a few hours thinking about the issues in this chapter and recording some measurable goals will help you immensely as you embark on your persona effort. The notes you jot down during this phase will be invaluable when you are (inevitably) asked to justify the time, effort, and money you spent on creating and using personas.