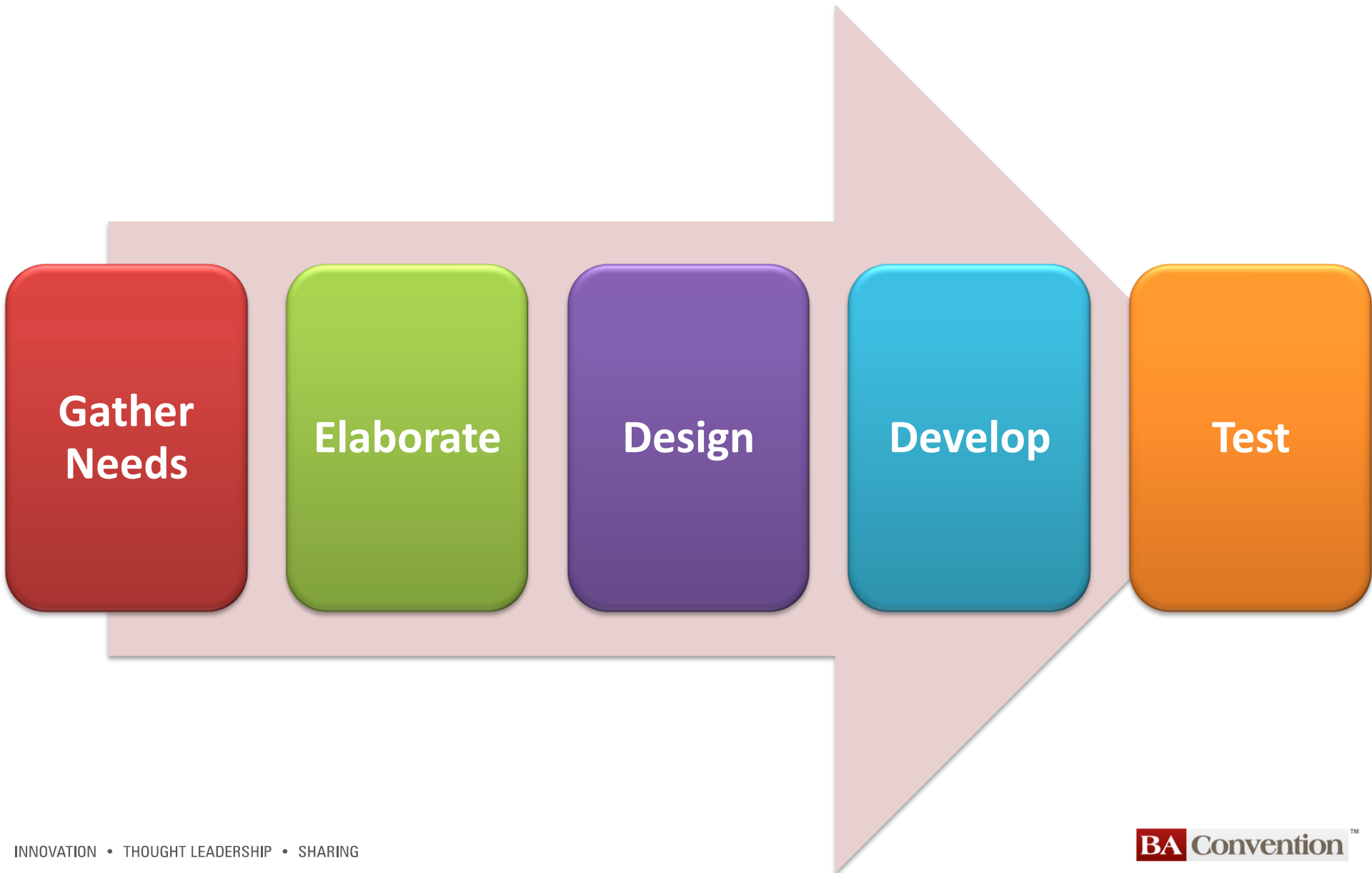# Using Personas in Design Thinking

Ashu Potnis
TechnoSolutions

BA Convention™
INNOVATION • THOUGHT LEADERSHIP • SHARING

Traditional Product / Application Development

Gather Needs → Elaborate → Design → Develop → Test

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Gather Needs

- Market Requirements
- User/Business Requirements
- User Stories
- Use Cases

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Elaborate

- Functional Requirements
- Non-Functional Requirements
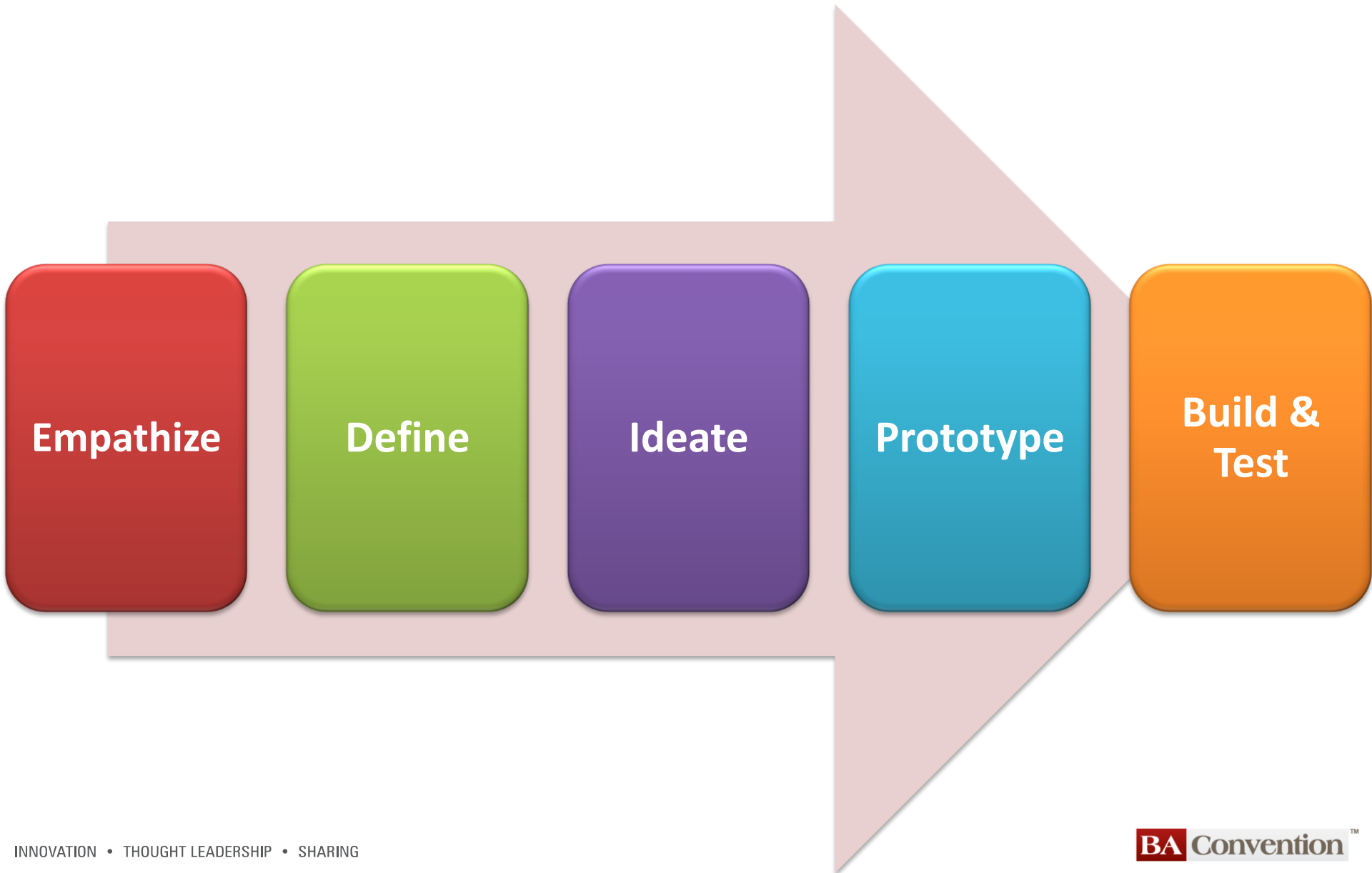- User Stories
- Use Cases

Design

- Architecture
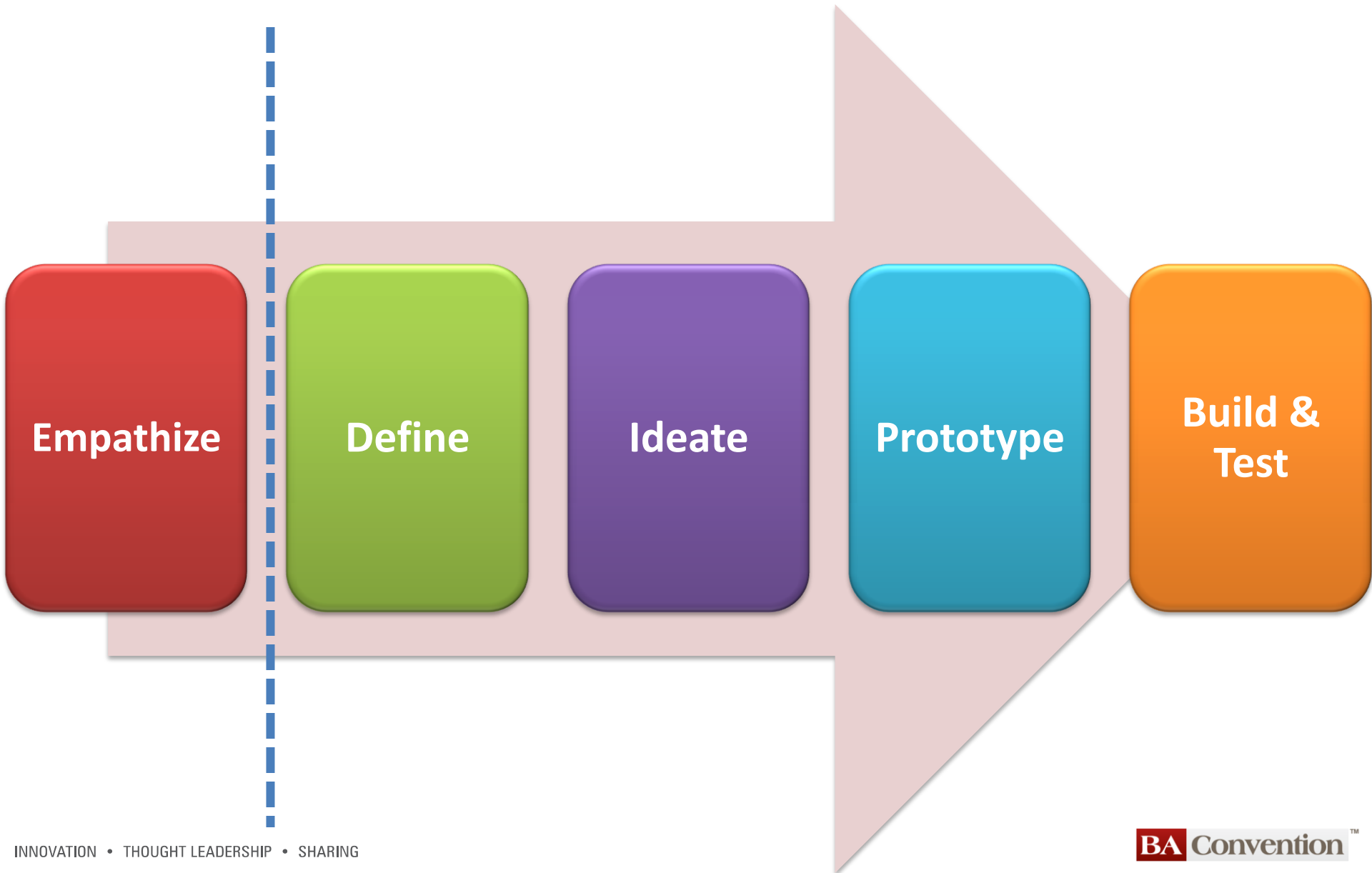- User Interface
- User Experience

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Design Thinking

~ developing products and systems by **understanding users** and their needs and developing insights to satisfy those needs

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Design Thinking

Empathize **Define** **Ideate** **Prototype** **Build & Test**

Design Thinking

Empathize | **Define** | **Ideate** | **Prototype** | **Build & Test**

Empathize

- Learn about and understand your target audience

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Define

- Develop an insight into user needs

Ideate

- Brainstorm multiple solutions to satisfy user needs, solve user problems

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Prototype

- Build prototypes and gather feedback

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Empathize

~ Stand in the shoes of the target user/customer to experience his/her feelings, needs, desires and goals

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How to develop empathy?

Traditional techniques for understanding user's perspective

Actors
- Use Cases

Role
- Role, Goal, Benefit
- User Stories

Lane
- Business Process Models

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Another approach

Persona

- With "Persona" you can get closer to your user

What is Persona

~ a persona is an instance of your target audience/user that's been brought to life

~ personas help visualize your user

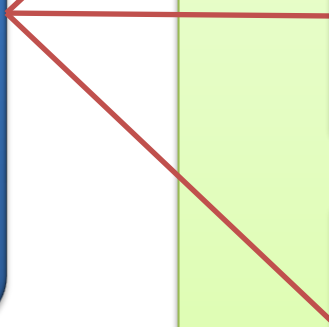| Abstract	Specific
• Actor • Role • Lane	• Persona

Developing Personas

- Demographics – Age, Gender, Education / Bio

- Logical Needs

- Emotional Needs

- Goals & Motivations

- Problem & Frustrations

- Comfort with technology

Usually documented in one or two pages

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Name:	Margaret Atkins
Occupation:	VP of Branding
Company Size:	Fortune 500 Company
Education:	MBA Degree
Age:	47

Goals

1. Maximizing Brand Presence in order to achieve the highest possible ROI
2. Reducing churn by 50% in the next 2 years
3. Mitigating possible losses from bad PR strategies
4. Improving inter-departmental

Needs

1. A collaborative tool
2. Extended analytics report
3. 24/7 media monitoring
4. professional advice

Technical background and workplace

Margaret is a person connected to the internet 24/7.She uses MacBook pro, ipad, iphone and kindle. She spends her entire day working at the office. She travels on business a lot, meeting new people and attending conferences. Her favorite business website is MarketingProfs.com. She is a PRO member of their network and has a special deal with them for all her Branding Department employees.

INNOVATION

Target Audience | Persona Example B2B

Jill
Director of Clinical Affairs

Profile

Jill has 10 years of experience in all aspects of drug development for biologics, pharmaceuticals and devices. Her experience includes 5 years of data management experience as as well as several years within domestic clinical trial management. Her areas of expertise include oncology, gastroenterology, ophthalmology, dermatology and infections diseases. Jill is responsible for defining the clinical trial strategy and management of all clinical studies being conducted by her company. She manages moth the operational and logistical tasks of clinical development to ensure efficient execution of trials within established budgets and timelines including partner relationships / management.

She is comfortable with technology, and frequently uses the Internet for networking, industry related conversations and to keep up-to-date regarding industry guidelines. She uses LinkedIn to keep up-to-date for networking and within important groups such as Biotechnology, Pharmaceuticals.

Demographic

Age	Education	Children
32-42	BS	No
	Masters of Science	

Source - Pew Research Center, comScore, LinkedIn

Digital Habits

- Highly educated women are likely to use social media platforms for both work and personal use - 65%

- As part of Gen X she is an information seeker

- Quicker to make online purchases than women. Purchase is more of a tactical decision for men

- 51% search information for their job

- 90% use a search engine to find information daily

- 84% research products

- 94% use email

Regular commuter

Alan Bernard

Products

- ❖ Season ticket holder
- ❖ Oyster card

Background

- ❖ Lives in Reading
- ❖ Married with two children (now both at University)
- ❖ Aged 58
- ❖ Works in London
- ❖ Commutes 4 days a week, works from home 1 day a week
- ❖ Marketing Director of an Insurance company

Transportation

- ❖ Owns two cars
- ❖ Goes by car to the train station
- ❖ Uses buses to get round London (sometimes tube)
- ❖ Works on the train – gets an early morning train to guarantee a seat so that he can work

Profile

- ❖ Enjoys weekends away
- ❖ Keen gardener
- ❖ Uses companies Blackberry
- ❖ Works on his laptop daily, but not tech savvy

Commissioner
Derek Morris

"We have high standards, and I want to ensure the customer's satisfaction by fully optimizing the system."

Personal Information

Age: 43
Company: ▨▨▨▨▨
Position: System Design Engineer
Location: Anaheim, California
Marital status: Married with 2 kids

Experience

He has worked in the AV Industry for 7 years, after college as an integrator and programmer, then later as a product manager. He has been working at ▨▨▨▨▨ for 5 years.

Work Environment

He works onsite at **control rooms for government facilities, office buildings, and educational environments**. In a secured environment, he cannot bring his own gear so usually he has **limited resources**. Work sites typically have **various factors** outside of the ▨▨▨▨ system to configure and optimize the system.

Artifacts

- Laptop
- Mouse
- Work cellphone
- Configuration software
- CAT 5 cable
- USB Flash drive
- Hardware tools (Test pattern generator)

Understanding of Concepts & Terms

	High	Medium	Low
Presets Layout Mullion compensation Edge blending EDID		-	-

Skills

AV Experience	
VideoWall Experience	
Tech Comfort	
IT Skills	

Frustrations

- Tediousness of size and positioning
- Persistent SW bugs and design issues
- Unprepared customers
- Unexpected delays / hold-ups,

Behaviors

- Prior to going on site he likes to get the status of the installation and the job site
- Understands his job consists of several roles:
    - Install, configure, and test the ▨▨▨▨ (and sometimes the rest of the system)
    - Generate and configure presets

Goals

- Configure to perfection to uphold ▨▨▨▨ high standards
- Optimize the system as efficiently as possible

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Documenting Needs of Personas

What is a User Story?

A **User Story** is a brief description of the "User Goal" to be satisfied by the system

User Stories are

functional Requirements.

i.e. What the system should do

User Story Structure (RGB)

Role - (As a)

Goal - (I want to)

Benefit - (So that)

User Stories are **functional Requirements**.

i.e. What the system should do
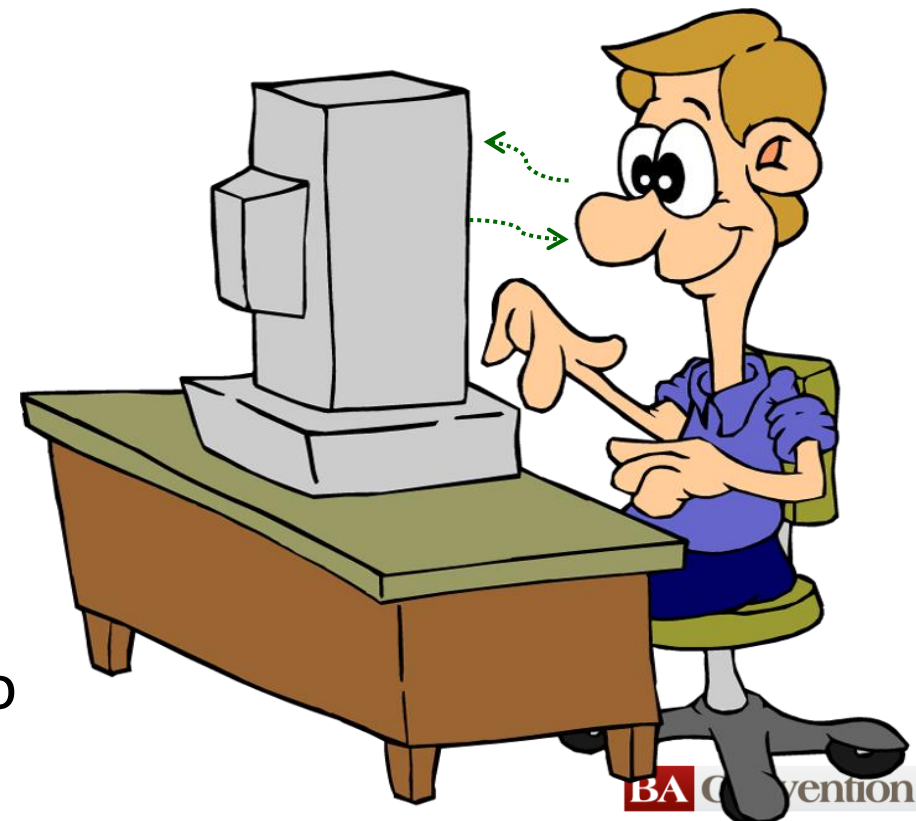
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As a

Doctor's Assistant

I want to

schedule patient visits with the doctor

So that

I can ensure optimal utilization of doctor's time and avoid scheduling conflicts

What is a Use Case?

A Use Case tells the story of how an Actor (or Actors) interacts with the system in order to achieve a goal.

User Cases are
functional Requirements.

i.e. What the system should do

Typical Use Case Scenarios

Main Flow (Success)

Main Success Scenario

➡ 1. **Customer** chooses Open Account option

2. **System** requests the following **Customer** information

   2.1. Name

   2.2. Address

   2.3. Email Address

   2.4. Social Security Number (SSN)

3. **System** checks SSN with Social Security Administration database

▼ 4. **System** verifies that SSN check has passed

5. **System** creates account for **Customer**
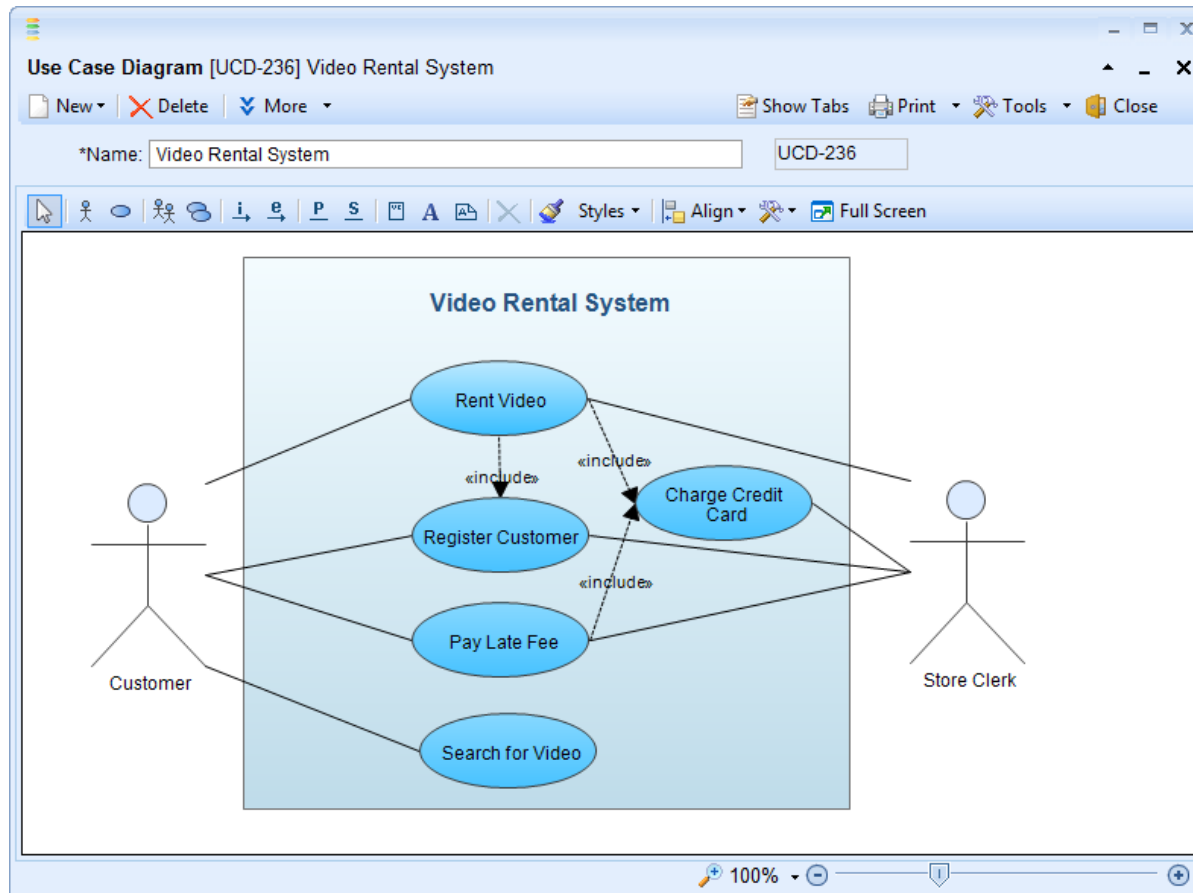
6. ◉ **Use Case ends with Success.**

Alternate Scenarios

Alternate Flows (Success/Failure)

4a. SSN check failed

1. **System** displays message "Sorry, cannot create account. We are unable to verify your SSN"

2. ◉ **Use Case ends with Failure.**

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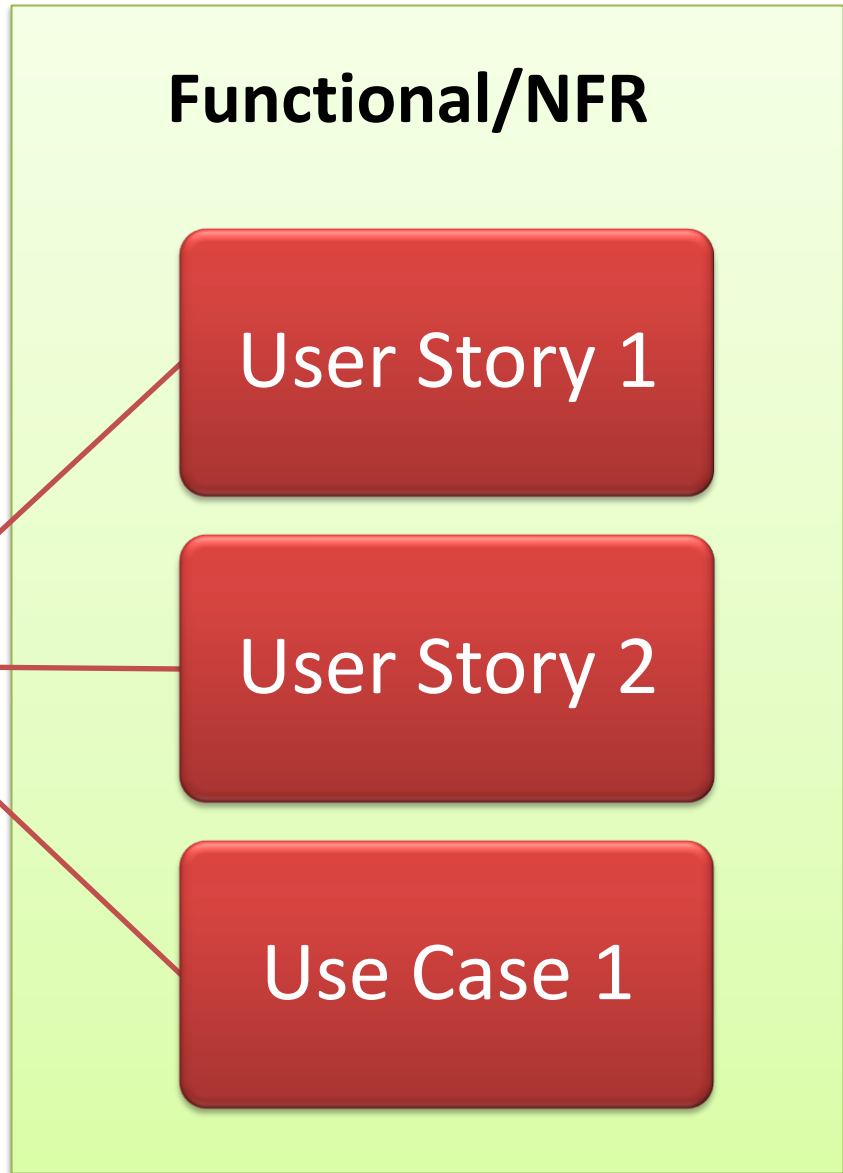
Use Cases are **functional Requirements**.

i.e. What the system should do

Design Thinking

With Personas, User Stories and Use Cases you can develop products that delight your users.

Thank You

Thank You!

TopTeam *Analyst*

Visual Process Modeler

Visual Use Case

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