USING PERSONAS TO DEVELOP AWESOME EXPERIENCES
WE ARE

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These slides will be made available to you after the conference.
Create + Develop

Share + Understand

Work + Evolve
Create + Develop

What they are
Why they’re useful
How to create them
PERSONAS

A persona is a representation of a type of customer.

Personas answer the question
“Who are we designing for?”

They help to align strategy and goals to specific user groups.
PERSONAS

What they are

• Accurate representations of users based on user research that incorporate user goals, roles, needs, and interests.

• They answer the following questions:
  o Who are our users and what are they trying to achieve? Why?
  o What behaviors, assumptions, and expectations do they have?
PERSONAS

What they are NOT
• A list of user tasks, duties, and responsibilities.
• Broad, generic, or vague archetypes.

How they’re useful
They help you understand users’ needs, pain points, motivations, and context of use.
INPUTS

Client-facing team
Trends
Analytics + Research
Customer Service/Help Desk
Users
<table>
<table>
<thead>
<tr>
<th>Personas</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Journey</strong></td>
<td>Map condensed with fill-in-the-blank</td>
</tr>
<tr>
<td><strong>Hypothesis</strong></td>
<td>Framework with fill-in-the-blank</td>
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<tr>
<td><strong>User Story</strong></td>
<td>With fill-in-the-blank</td>
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</table>

- **Demographics**
- **Company info**
- **Background story**
- **Environment**
- **Attitude/Behavior**
- **Development needs**
- **Daily tasks/needs**
- **Challenges/frustrations**

**ORGANIZE**

### User Success Story
- **Name**: Andrea
- **Title**: Account Executive
- **Role**: Manager
- **Background**:
  - Location: North America - West Coast
  - Industry: Pharma and Life Sciences

**Experience with learning/training and usage**
- Identify digital and online experiences with learning
- Familiar with both online and blended learning
- Has a personal experience with online learning, but hasn’t been responsible for providing opportunities for his team.

### About/Context
- **Andrea** is in her mid-30s and works for a pharmaceutical company as an account executive at the company. She has worked in the industry for several years and has risen through the ranks to become a senior manager.
- **Hypothesis**: Andrea believes that her current job is challenging and is looking for ways to improve her performance. She is interested in learning new tools and technologies that can help her be more efficient.
- **Challenges**: Andrea is facing challenges related to her daily tasks, such as managing accounts, communicating with clients, and handling prospecting and sales activities. She also feels that her current tools are not user-friendly and are not well-integrated with other systems.

### Attitude/Behavior
- **Andrea** is a detail-oriented person who pays close attention to every aspect of her job. She is always on the lookout for new ways to improve her performance and is always looking for ways to learn and grow.
- **Hypothesis**: Andrea believes that her current job is challenging and is looking for ways to improve her performance. She is interested in learning new tools and technologies that can help her be more efficient.
- **Challenges**: Andrea is facing challenges related to her daily tasks, such as managing accounts, communicating with clients, and handling prospecting and sales activities. She also feels that her current tools are not user-friendly and are not well-integrated with other systems.
Why is Andrea a challenge to design for?

Andrea is always on the go - traveling or to meetings at work. She is nervous about losing her position to the employees who work under her. She compares herself with her peers and does not feel comfortable. She also worries that she does not have enough time to complete everything she wants or is required to. She feels unmotivated about her own development, and worries that it is affecting her reputation at work.
Who is Ambivalent Andrea?

- Early 30s
- Stressed about closing deals
- 4 direct reports
- Anxious about how she's perceived
- Time pressed
- Travels a lot

Andrea's Expectations

- Irrelevant
- Time consuming
- Boring
- Hard to track
- Same old learning experience

Show Andrea

- Inherent value of learning
- What's required
- How she compares
- Worthwhile, fun, valuable experience
- Multiple paths to learning
- Tools to help guide direct reports
- How to apply learning

Development Goals

- Leadership Potential
- Emotional Intelligence, Teamwork, Focus
- Motivation, Adaptability, Continuous Improvement, Learning, Stewardship

QA Considerations

- Lots of stakeholders, but not tech savvy
- Mix of intranet/mobile
- Pharma Industry - security needs
- <3,500 employees
- On the road constantly
RULES OF THUMB

• Imagery should not be cheesy
• Ideally 3-5 personas maximum
• Validate personas
• Treat personas as living: update when presented with new data, information, or feedback
YOUR TURN

Take a minute to jot down a few details about someone you have in mind.

A goal
A pain point
A behavior or attribute
A name
YOUR TURN

Take a minute to jot down a few details about someone you have in mind.

A research associate who prefers electronic data over getting data out of print sources.

A 34-year-old alum who contacts Alumni Career Services in search of career guidance after a company downturn.

A faculty professor who needs to collect specific class material during a research trip.

An admin who uses the HR software to make updates to employee information.

A goal
A pain point
A behavior or attribute
A name
Share + Understand

Trading Cards
Journey Maps
TRADING CARDS

NEEDS AND IMPLICATIONS
Needs time for her own development and resources to develop her direct reports
Multiple paths to learning that is relevant and valuable to the here and now
How to apply learning on the job
How she compares to her peers
Tools to guide direct reports

WHY IS AMBIVALENT ANDREA A CHALLENGE?
Guts by with just the right amount of effort
Has lots of apps and devices, but not particularly tech savvy
Unimpressed with leadership development efforts by her organization up till now

Andrea
FRONTLINE MANAGER

“I have a sales quota, no time and a lot of stress. I’m used to learning on the job. How is this experience going to help me?”

Mathieu
GROUP MANAGER

“I want to get my direct reports information that will help them – and the team – move forward.”

Harry
INDIVIDUAL CONTRIBUTOR

“I only want to see stuff I’m interested in and ways to share it with others. Give me information and ideas I can use right away.”

NEEDS AND IMPLICATIONS
He is pressed for time, wants to be quick and helpful
He won’t follow up questions that he can use with team to improve the current process
Values content in other languages, especially for non-English speaking people in his department
Wants to create leadership role for the team, but also for himself, needs to know what others are doing

WHY IS MENTOR MATHEW A CHALLENGE?
He is not experienced with leadership development, needs more guidance to feel what his people need
Wants to know his group is getting something out of the content

NEEDS AND IMPLICATIONS
Wants to know quickly whether it’s worth reading or not
Plans his time, how long do things take?
Wants to remember the salient points, so he can use them in day-to-day work
Share with colleagues and know what they are finding useful, too
Save interesting stuff for later - offline or on
Mobile州市宁波市

WHY IS IH PO HARRY A CHALLENGE?
Wants everyone to know he’s reading
Wants his boss to know that he’s using it on the job
Fears too high expectations for the content, the experience, and the application to his day-to-day work
JOURNEY MAP

STEP 1

STEP 2

STEP 3

STEP 4

DOING

THINKING/FEELING

PAIN POINTS/FRUSTRATIONS

TOUCHPOINTS + CHANNELS

GRADE PERFORMANCE

IDEAS + OPPORTUNITIES
YOUR TURN

Take a minute to jot down a couple of steps in your persona’s journey. What are they doing, thinking? What frustrates them?

Do you have any ideas or opportunities to make their experience better?
Work + Evolve

Scenarios
Prioritization Matrix
Agile Stories
Hypotheses
SCENARIO
SCENARIO

Andrea is tired. She travels a lot. The Pharma industry is pretty ruthless; she's got sales quotas to make, and four people to manage to help her get there. Her own development is not top of mind, and unfortunately it shows in her performance reviews. Recognizing this, her manager recommended that Andrea have access to HMM. There are regular communications from HR about suggested topics and readings, and links to tools that could be used on the job. While there's no requirement to complete topics, to get credit for completion, employees are expected to complete lessons and assessments. OTJ is available - not required - but strongly encouraged.

In addition, Andrea's direct reports are hankering for more responsibility as well. They're motivated and sharp. Andrea is a little nervous that they could move up the ladder more quickly, even though they have less experience than she does. Andrea will be expected to help guide their development as well. How will she manage that in addition to her own development? Will it even be worth it?
PRIORITIZE

Andrea
FRONTLINE MANAGER

“I have a sales quota, no time and a lot of stress. I’m used to learning on the job. How is this experience going to help me?”

Harry
INDIVIDUAL CONTRIBUTOR

“I only want to see stuff I’m interested in and ways to share it with others. Give me information and ideas I can use right away.”

Mathieu
GROUP MANAGER

“I want to get my direct reports information that will help them—and the team—move forward.”
**PRIORITIZE**

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<td></td>
</tr>
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**Score Explanation:**

- 1: detrimental
- 0: neutral
- 1: nice-to-have
- 2: must-have

Audio: voice actor e.g., “I have a sales quota, no time and a lot of stress. I’m used to learning on the job. How is this experience going to help me?”

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AGILE STORIES

**Format:**
As *a role*,

I want *experience/feature>*

So that *value>*

https://www.mountaingoatsoftware.com/agile/user-stories
AGILE STORIES

Format:
As <persona name>,
I want <experience/feature>
So that <value>

https://www.mountaingoatsoftware.com/agile/user-stories
YOUR TURN

Take a minute to write an agile user story using your persona. Look back at one of the pain points from the journey map.

What could be done to address the frustration?
We believe that [doing this / building this feature / creating this experience], For [these people/personas], We will achieve [this outcome], We will know this to be true when we see [this feedback / quantitative measure / qualitative insight].
Questions?
Websites + Tools

**Describing Personas** *(read)*
https://medium.com/@indiyoung/describing-personas-af992e3fc527

**Create UX Personas** *(video)*
http://uxmastery.com/create-ux-personas/

**A simple introduction to Lean UX** *(read)*
https://www.interaction-design.org/literature/article/a-simple-introduction-to-lean-ux

**Creating powerful personas** *(slides)*
https://www.slideshare.net/blakepickering7/creating-powerful-personas

**Hypotheses driven UX design** *(read)*
https://medium.theuxblog.com/hypotheses-driven-ux-design-c75fbb3ce7cc

**Anatomy of an experience map** *(read)*
http://adaptivepath.org/ideas/the-anatomy-of-an-experience-map/

**Mural online collaboration** *(app)*
https://mural.co/

Try searching online for: UX personas, Lean UX, UX journey map, UX experience map, UX hypothesis
Using Personas to Develop Awesome Products
WORKSHEET

Persona Details (a goal, a pain point, an attribute or behavior, and a name)

User Journey Map (write down a few steps of your user’s journey)

<table>
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PHASES OF THE JOURNEY

example: Onboarding

DOING
✔

THINKING/
FEELING

PAIN POINTS/
FRUSTRATIONS
Agile Stories (As <persona name>, I want <experience/feature> so that <value>.)

(Example: “As Andrea, I want content recommendations and guidance when I log in so that I can get to what I need to quickly and efficiently.”)

Hypotheses (We believe that <doing this / building this feature / creating this experience> for <these people / personas> will achieve <this outcome>. We will know this to be true when we see <this feedback / quantitative measure / qualitative insight>.)

(Example: “We believe that by providing clear guidance and recommendations about content for Andrea, it will help her know quickly what she should do next. We will know this to be true when: 1) the number of completed topics is up 10% over the same period last year, 2) completions happen over a shorter period of time, and 3) learner satisfaction measured by in-product NPS has increased by 15%.”)

Questions? Would you like us to present to your team?  
Maureen Barlow: maureen.barlow@hbr.org  
Donna Megquier: dmegquier@harvardbusiness.org
Who is Ambivalent Andrea?

Andrea's Expectations

Show Andrea

Development Goals

QA Considerations

Andrea
Account Executive
Frontline Manager

Not sold on idea of bettering herself because she gets by with just the right amount of effort. Her job is stressful enough without finding time for professional development.

Not motivated—she doesn’t care, doesn’t see the value, or hasn’t had any great learning experiences yet.

Inherent value of learning
What's required
How she compares
Worthwhile, fun, valuable experience

Multiple paths to learning
Tools to help her guide direct reports
How to apply learning

LEADING YOURSELF
Know and Manage Yourself. Develop Personal Adaptability. Understand + Respect Others. Cultivate Learning Agility, Demonstrate Integrity, Communicate Skillfully

LEADING OTHERS
Accelerate Talent Development; Acquire and Manage Talent; Leverage Networks; Build & High Performing Teams; Inspire Engagement; Value Differences

LEADING THE BUSINESS
Manage Complexity; Act Strategically; Manage Global Business, Focus on Customers; Foster Innovation; Drive Execution; Build Functional Expertise

Products
HMM LE

Programs
NLP BLP LOL LD

Lots of apps/devices, but not tech-savvy
Mix of laptop/mobile
Pharma industry = security reqs
<2,500 employees

On the road constantly
HBS Baker Library UX Team

Here are four examples of user personas from HBS Baker Library from when interviews were conducted with the core audiences during the discovery phase for their new website.

Research Associate
“S prefers electronic data access to using Baker collections, and is actually resistant to the idea of getting data out of print sources. S is good at working the system, and before they know it, 3 or 4 different Baker staff members will be helping her with her project in parallel. Her “sit down with me for five minutes” will unquestionably expand to many hours of Baker staff time. She is sensitive about her lack of familiarity with business jargon, which she doesn’t want her professor to see. She meets with her professor every week or so, but they email or speak practically every day, and she is very happy that her desk isn’t near his in Morgan.”

Faculty for over 10 years
“F is a prolific writer, and relies heavily on Baker Library for his research. He prefers Baker’s experienced staff, who know him and his methods, to an inexperienced RA, who will only stay a few years. In addition, F’s travel schedule is such that he doesn’t have time to break in and manage a green RA. Because his affairs are so complicated he has an FA who is both skilled and hands on – she may pass requests directly to Research Services from F, or call Research Services or BISC when she has exhausted her own resources and is stumped by a request. F has the highest regard for Baker Library’s collections, staff, and services, but will never learn to use the desktop tools the library has put on the home page, and is unlikely to visit the library in person. He has come to love email, because, unlike the phone, time zones don’t matter. When possible, though, he still prefers the phone.”

Alumni
“After a downturn at his current company, 34-year-old alum W has contacted Alumni Career Services in search of some career guidance. He is referred to Baker Library to investigate potential new employers. While at HBS, W utilized Baker a few times for help on field studies and to benchmark his salary before accepting his current position. He is frustrated about not being able to get into the same resources (databases, tools, information sources) that he had access to as an MBA student. He’s never really understood that in terms of Baker Library his privileges have changed radically, and is surprised that his HBS MBA status doesn’t carry over past graduation. As an HBS alum, W is always friendly to the library staff, but expects topnotch service from both HBS and Baker Library. He is very tech savvy, and wants to learn the most effective ways to do his job searching. He needs to feel that he is in control of the situation. Although he has tried to find resources himself on the library site, W feels both overwhelmed by the amount of information on the site, and very frustrated that when he finds something useful, he is blocked from many resources.”

MBA Student
“C is not “library savvy” and has become used to assistants doing her leg work and getting her the information that she needs when she needs it – usually ASAP. C doesn’t use the library on a regular basis for her first year of coursework, and she is not familiar with the library’s services. As a matter of fact her professors discourage library use during the first year of the MBA program because they feel that research would hinder the case method teaching approach. However, C does use the library for job search research – she needs to locate and obtain a summer internship as part of the MBA program. When she does come to the library it is usually in the afternoon after class. She finds the copy machines and printers very convenient.”

Got questions?
Contact Dimitri Siavelis at dsiavelis@hbs.edu