# The fundamentals of personas

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# We are Make it Clear,

### and that's what we do.

Make it Clear is a London-based service design agency with a proven record of improving experiences for clients including Virgin Media, Google, Cambridge University Press, Thales and Orange. We create research-led solutions that focus on clarity to improve interactions, drive results and reduce costs.

Take a look at the selection of case studies on our website to learn more, or if you'd like to get in touch, please send an email to: hello@makeitclear.co.uk

# Introduction

At Make it Clear we have spent many years taking a user-centric approach to design solutions, guided by our research processes. Alongside an array of research outputs, we often create personas as an outcome of discovery phases; they are a useful tool to support decision-making, guide user-centric outputs and empower teams with an understanding of their audience.

In this document we cover the fundamentals of user personas to help you understand what makes a good persona and how they are used, and to give guidance to create your own set of user personas.

We hope that you find the information in this report, and the accompanying template, useful in supporting your organisation to create a best in class user experience.

# What are user (UX) personas

A persona is a representation of a typical existing or desired user group, and is shown in the form of a fictional (but realistic) person. It often includes information such as:

**Personas represent the attributes embodied by user types, creating a common vocabulary for internal teams and facilitating faster discussion and decision making.**

**Name, age and job title**

**Typical actions**

**Description (background)**

**Attributes and traits**

**Challenges or pain points**

**A quote**

**Goals, motivations and behaviours**

Personas are a commonly used tool within UX and user-centric design processes, and can help direct the focus of a digital product and avoid adding 'just in case' functionality.

# UX vs Persona types

## UX Personas

In this report we focus on user or UX personas. This type of persona includes specific attributes and insights into their usage of a product or service such as their goals, needs and common actions.

This type of persona is used to inform the user experience, interactions and look and feel of the product.

## Marketing Personas

Marketing personas on the other hand focus much more on customers and their traits. They may include information on how they discover your organisation or product, opinions on the brand and overarching experience they have across various touch points.

This type of persona is used more to provide insights on attracting, engaging and retaining customers.

## Proto Personas

Proto personas are another type of persona. However, the difference between proto personas and personas is the information they are based on. Proto personas are created using assumptions and insights gathered from organisational stakeholders.

If you are unable to gain direct access to your audience, proto personas can be a useful alternative which can then be built on with further research.

# What makes a good persona

When done well, personas are a powerful tool to support the design process and guide end outcomes to meet the needs of users. However, not all personas are made equal. Here are some tips on what makes a good persona.

## 1 Their profile feels believable or familiar

It's important that your personas are created based on real insight into your user group. This will create confidence in uptake and most importantly accuracy in use. If their profile feels plausible (and if representing existing users, somewhat familiar) they are more likely to be adopted by the product team and be central to the design process.

## 2 You can can tell a story about them and support decision making

There should be enough useful information about them that the team can see from their point of view. They should be able to form credible stories around them to support decision making and come to life as an extra member of the team.

## 3 They are up to date and refined

Personas are not a static resource. They represent real people, and as your user's opinions, behaviours or challenges will naturally change over time, your personas should evolve to match this. Similarly, you will learn more information and this additional context should also be included.

❝ **An effective persona makes it easier to challenge the designer's own preconceived ideas of how a user might behave. This is particularly important when the user is from a different demographic to the design team.** ❞

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# How to use personas?

Personas should be a key part of the design process, empowering team members with direct user understanding and supporting decision making.

They can be seen as an extra member of the project team, able to quickly answer questions and help to prioritise requests. Often in the design process it can be easy to include 'just in case' functionality; personas help to avoid this and create focus.

Personas should be used not only in the initial design and development phases but as a constant tool when reviewing or changing touchpoints. It's important that the whole team is familiar with who your personas are.
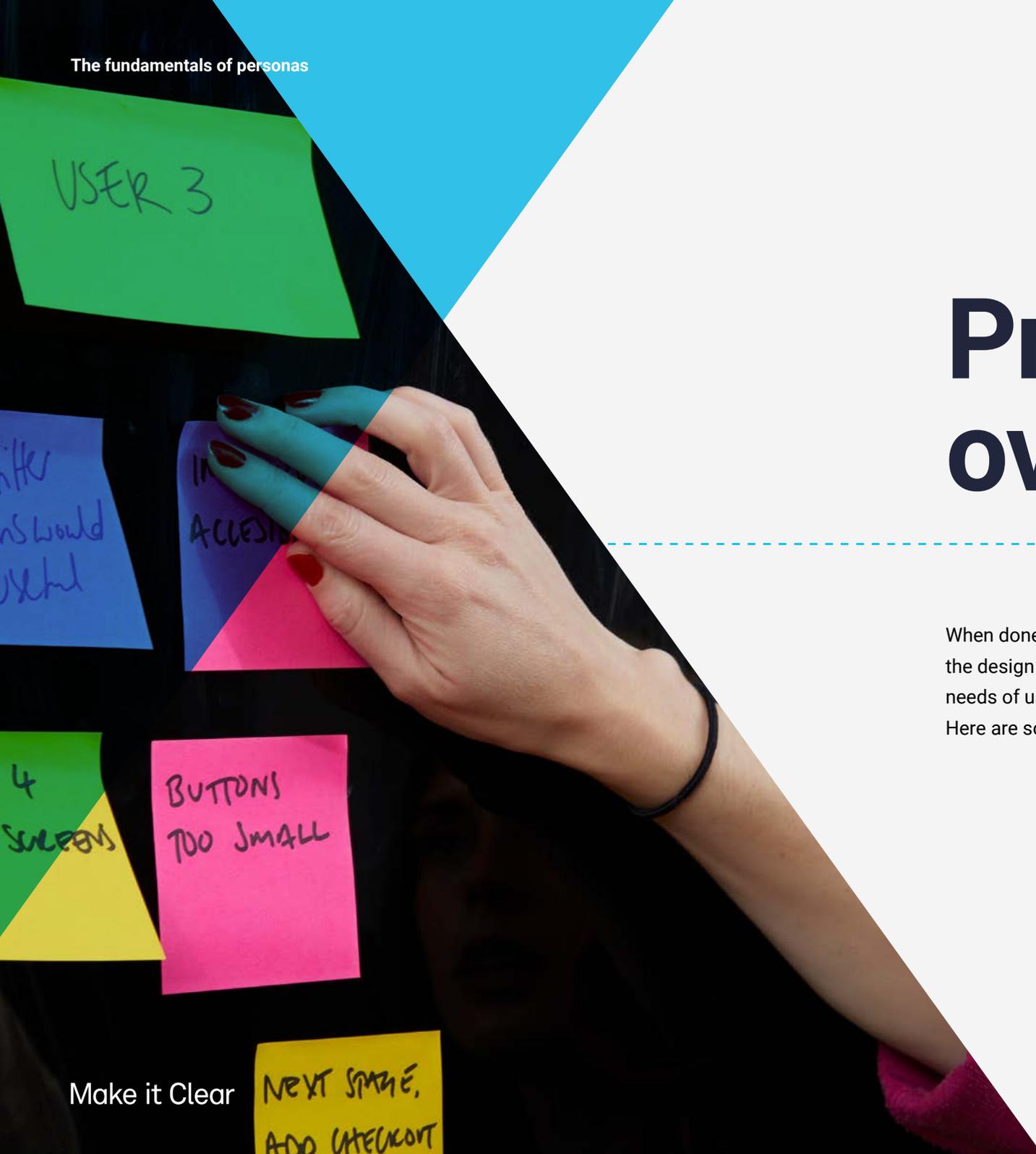
# **Process overview**

When done well, personas are a powerful tool to support the design process and guide end outcomes to meet the needs of users. However, not all personas are made equal. Here are some tips on what makes a good persona.

**1** **Define your audiences**

Start by listing out all of your existing user types or target audiences. Prioritise those which are most important. This can be done in a number of ways such as considering those which are most frequent users; those which find most value in the product; or different roles in the process and seniority. We recommend to our clients that three to four personas are created. Any more than that and it becomes difficult to keep in mind all of the personas' needs and makes decision making difficult.

We like to conduct an audience definition workshop with project and customer-facing stakeholders to gain an accurate picture of all of the current or targeted audience types. If you are unclear on who your audiences are, a number of methods can be used to gain a better understanding, including on-site surveys, interviewing customer services teams or initial user interviews.

**2** **Outline your persona structure**

You may be tempted to do this once you begin to write your persona, however, doing this up front can be much more valuable. Having a clear understanding of your persona structure means that you can ensure your research activities support finding the information that you need. Defining this first also provides an opportunity to check that this is the most useful information before conducting research.

This can be done by listing the headers for each section of your persona and adding a brief description of the type of information you would expect this to include.

**3** **Conduct research**

Now that you have a clear idea of your audiences and the information you want to find out, it's time to conduct your research. Conducting research is important to ensure that your personas aren't built on assumptions and provide more rigorous insight.

We recommend that you conduct interviews with participants that represent each persona group outlined. If you are unable to gain direct contact with your users, consider alternatives such as web surveys, Google Analytics or interviewing customer-facing employees.

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**4** **Analyse the data**

The outcomes from the research conducted can firstly be used to validate your proposed audience groups and can then be analysed to identify common themes and patterns within each user type. Analysis should be conducted in a way that supports transferring insights into your persona structure, e.g. identifying themes across challenges faced for a particular user group.

**5** **Write your personas**

Once you have conducted analysis of your research findings, this can then be used to create your personas. Themes identified should be used to inform the key points on each persona. Using your persona structure, work your way through each of the sections. Aside from the description and quote, we recommend using bullet points to keep information concise and easy to understand.

**6** **Visualise**

This is where the persona comes to life. All of the details and information synthesised should then be visualised into an engaging format using your organisation's branding. This is important to encourage engagement and adoption of the personas.

**Quick tip:** Don't forget about additional audience types. Although having three to four personas is seen as optimal, it's likely that a number of other user types still exist for your product. It's still important to have an awareness of these users and in future revisit these to ensure their priority remains the same. We recommend including an overview of these audience types in your persona document.

# Personas most effective when embedded into processes and adopted across teams.

# Tips for embedding personas in your organisation

**1**   **Involve your team in the process**

Involving representatives in the process can be a useful way to support adoption but also confidence amongst the team in the validity of the persona insights. Having different teams involved, particularly those that are user facing, can be very useful in ensuring the validity of personas.

**2**   **Present back to your team**

Present the personas to representatives from teams across your organisation and provide them with an understanding of the process and how they should be used going forwards.

**3**   **Put in place reinforcing activities**

Activities could include personas forming part of onboarding processes or providing training for team members on personas and how to use them.

**4**   **Provide easy access**

Ensure that personas are in a place which is easily accessible whether this be on a digital office or creating printouts for office spaces. Creating awareness of the existence of personas and ensuring they are readily available is the first step in encouraging adoption.

**Quick tip:** Add some context to your persona document. This can include a brief overview of how they were created. You could also consider including pointers on what personas are and how they should be used depending on your team's expected familiarity with this type of tool. This helps to ensure that no matter who is looking at your personas and their familiarity, they should have enough understanding to adopt and use them.

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# How to use the Miro template

Start creating your own personas

Click the link below to download our free Miro persona board to kick-start your work. The Miro board provides step by step instructions alongside an easy to use template to support you in creating your own user personas.

Go to Miro board



ROLE / USER TYPE
What role do they have or what user type are they?
1

ORGANISATION / BACKGROUND
What type of organisation or background does your user have?
2

OBJECTIVES
What does your user want to achieve?
3

TRAITS
What are the characteristics of this user?
4

KEY ACTIONS
What are the main things your user does before, during and after using your product?
5

CHALLENGES
What are your users main pain points?
6

NEEDS AND EXPECTATIONS
What are the requirements of this user?
7

USER IMAGE
8
NAME
QUOTE
DESCRIPTION

1. Role / user type

2. Organisation / background

3. Objectives

4. Traits

5. Challenges

6. Needs and expectations

7. Key actions

8. User descriptors

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# Thank you

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