



CHI Bits on Persona Development from CHI 2008

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What are Personas?

Personas are a product design tool:

- First “invented” by Alan Cooper, in 1999
- A name for pretend users who represent populations
- Defined by their goals (goal-driven design)
- 1- to 2-page descriptions
- Names and personal details
- Used to drive *interface design*

Personas at CHI 2008

- Just one track, “character development”
 - > Paper: Latent semantic analysis (LSA)
 - > Paper: Empathetic characters
 - > Note: Data-driven personas

Data-Driven Persona Development

- Method
- Benefits
- Q &A

Challenge

What:

We were contracted by an internal group in another part of Sun to develop personas: Sun Learning Services

Why:

They needed to know more about who was taking training and getting certification.

Their goal was to use this new understanding to drive increased revenue in the coming fiscal year.

Method

1. Worked with client team to determine important persona attributes
2. Conducted wide-scale survey
3. Performed factor analysis to create initial persona groupings
4. Followed with targeted interviews to add details
5. Made adjustments to persona groups, as necessary

The personas distilled all of the survey responses and interviews into meaningful chunks

How does our method compare?

Pruitt & Adlin (2006)

- Identify important categories of users
- Process the data
- Identify & create skeletons
- Prioritize the skeletons
- Develop selected skeletons into personas
- Validate your personas

McGinn & Kotamraju (2008)

- Identify the important user attributes that you need to understand
- Survey
- Process the data
- Identify & create groups
- Validate through interviews
- Develop selected groups into personas

1. Client Team Involvement

- What did the client team need to know?
 - > Everything ... customer data was anecdotal
- We asked:
 - > What are the problems that you are trying to solve?
 - > What don't you know about your customers, that you wish you did?
 - > What are the biggest challenges facing you in the coming year?
 - > What data would help you face those challenges?

2. Survey

- 18 multiple-choice questions
 - > **Some demographics**, education, company size, industry, and *work tasks performed* (had name, country, address, phone number, email, product downloaded)
 - > **Technical training** experiences, motivators, inhibitors, who paid for training, how much had been spent over the last 2 years, training modalities taken, vendor selection
 - > **Professional certifications** held, motivations for obtaining certification, attitudes regarding certification
- Translated the survey from English into Simplified Chinese, Japanese, and Neutral Spanish

2. Survey Responses

Who: We used an internal customer database of people who were downloading software from Sun.

How Many: After removing duplicates & email bounces, we ended up with 11,000 – 12,000 valid contacts who were invited to take the survey

- **1328** completed surveys (better than 10%)
- People from **90+ countries** responded
- US response was only around 30% of total
- Respondents could opt in to being interviewed

3. Analyzing the Survey Responses

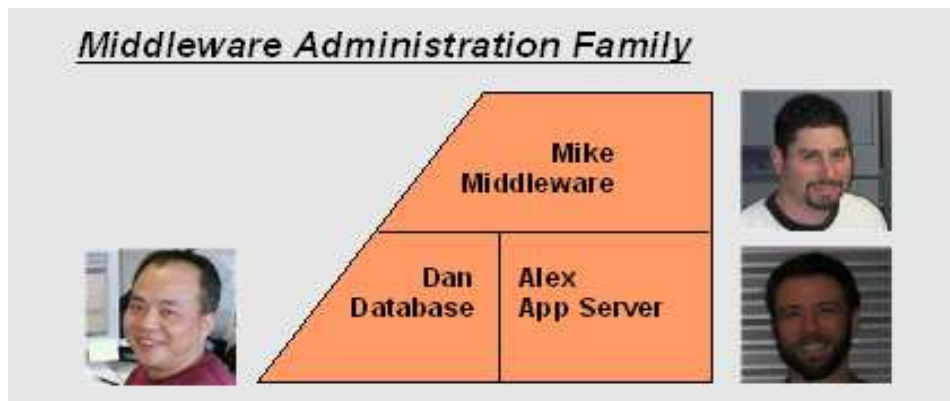
- Statistical factor analysis
 - a) Used time on task as the factors
 - > Two of the survey questions asked about work tasks
 - > Which of the 25 tasks listed did they perform?
 - > Which of the tasks that they selected did they spend the most time on?
 - b) Then factored the factors to see relationships between the original groups
- Factor analysis allowed the number of personas to emerge organically

4. Interviews

- Chose 3 to 5 names from each of the initial groups
- Invited survey respondents from the US who had opted in to be interviewed (easier with regard to legal issues around payment)
- A total of 27 twenty- to sixty-minute phone interviews were conducted
- Asked 11 open-ended questions
- Used interviews to refine personas, and to add detail around values, preferences, and motivations

5. Made Adjustments to the Groups

- There were major groups, or “families”, of personas, who emerged from the statistical analysis of *time on task*
- Then there were the personas themselves, which were members of those families
- Interviews ended up being a validation technique (database administration)
- Group members were adjusted accordingly



Method Review

1. Worked with client team to determine important persona attributes
2. Conducted wide-scale survey
3. Performed factor analysis to create initial persona groupings
4. Followed with targeted interviews to add details
5. Made adjustments to persona groups, as necessary

In 4 people months, we got stakeholder input, developed the survey, translated & ran the survey, conducted interviews, analyzed the results, & created personas

Benefits of Using this Method

- Personas are an artifact of real customer data
- Data is gathered specifically for creating personas
- Data set is of a statistically significant size
- Given the complexity and variety of our sample, four people months is faster than high-quality ethnography and people years faster than industry cases in the literature
- Factor analysis allowed the number of personas to appear organically
- Factor analysis allowed us to see the relationships between the personas, not just a flat organizational structure
- Client team is involved all the way through the process
- Allow the assumptions and beliefs of the client and practitioner can be challenged

Questions

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