



Getting a Seat at the Table

Creating + Using Personas for Effective Decision Making

Our Team

HCD Center of Excellence

<https://confluence.hcqis.org/display/HCD>

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Agenda

Welcome

Who

What

Why

morning break

When

How

lunch

Creation

afternoon break

Application

Summary + Questions

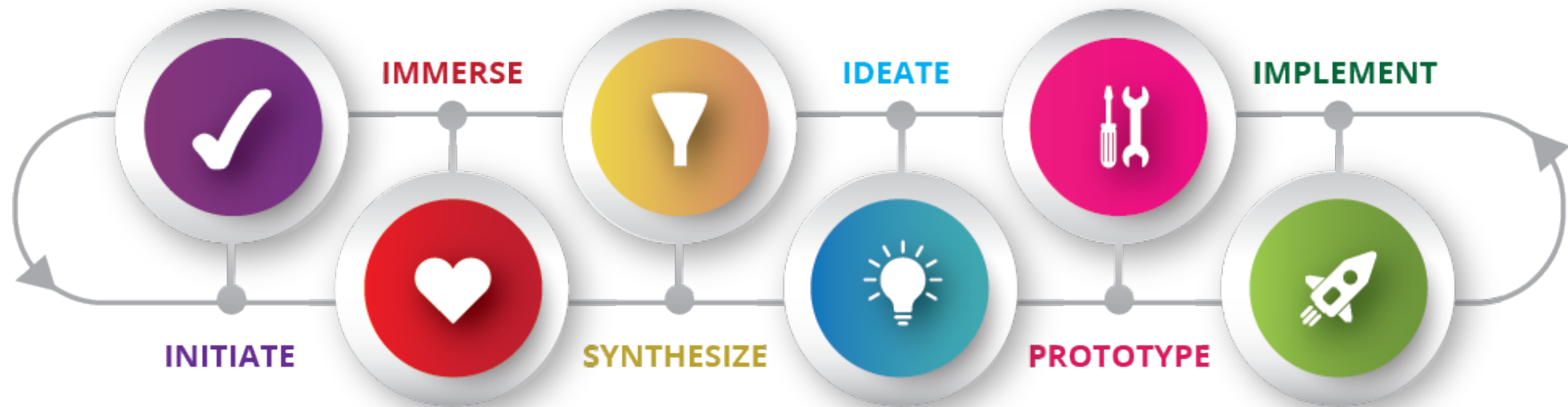


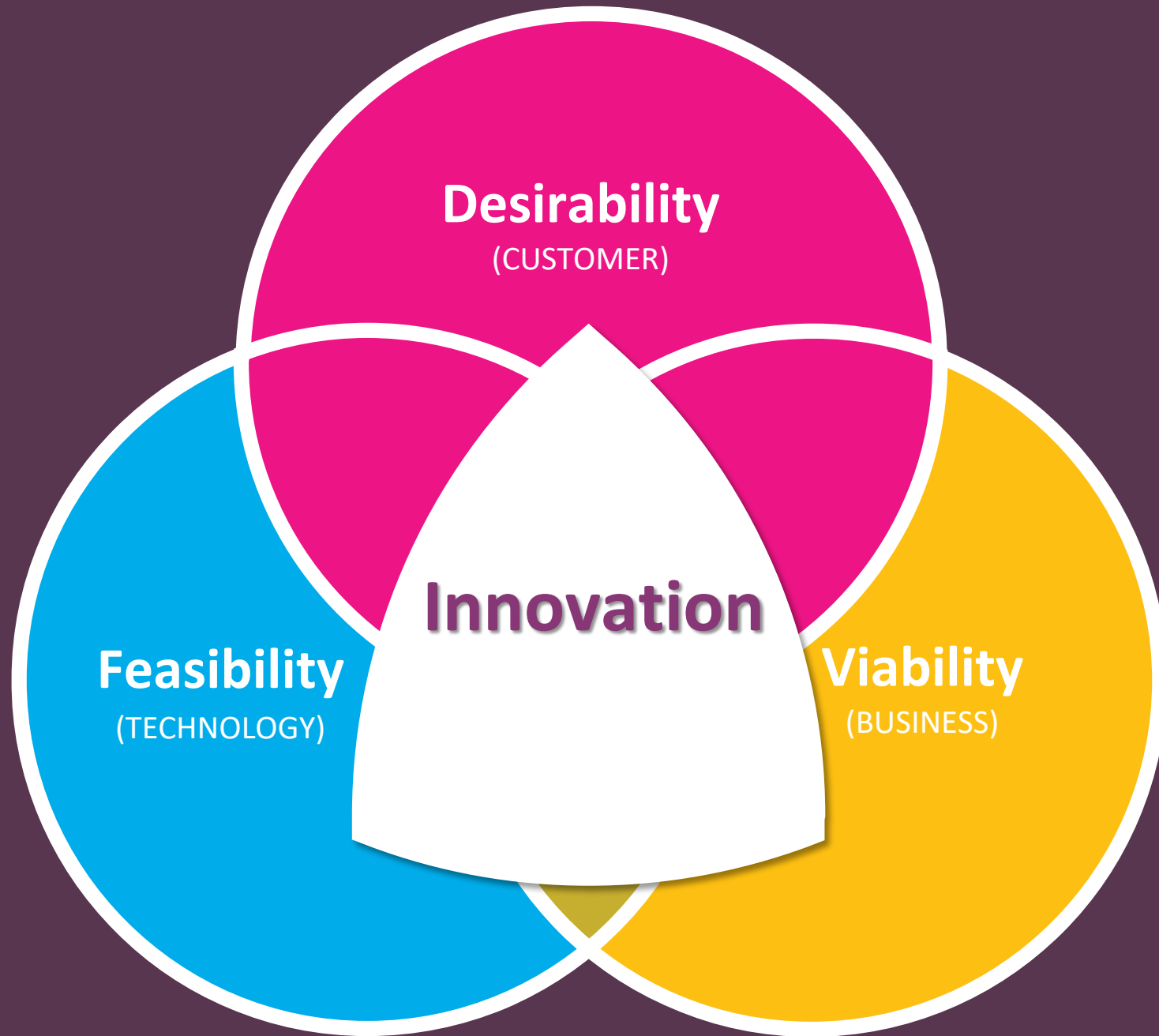
Welcome... let's review some HCD concepts!

Satisfy the Cat



HCD @ CMS



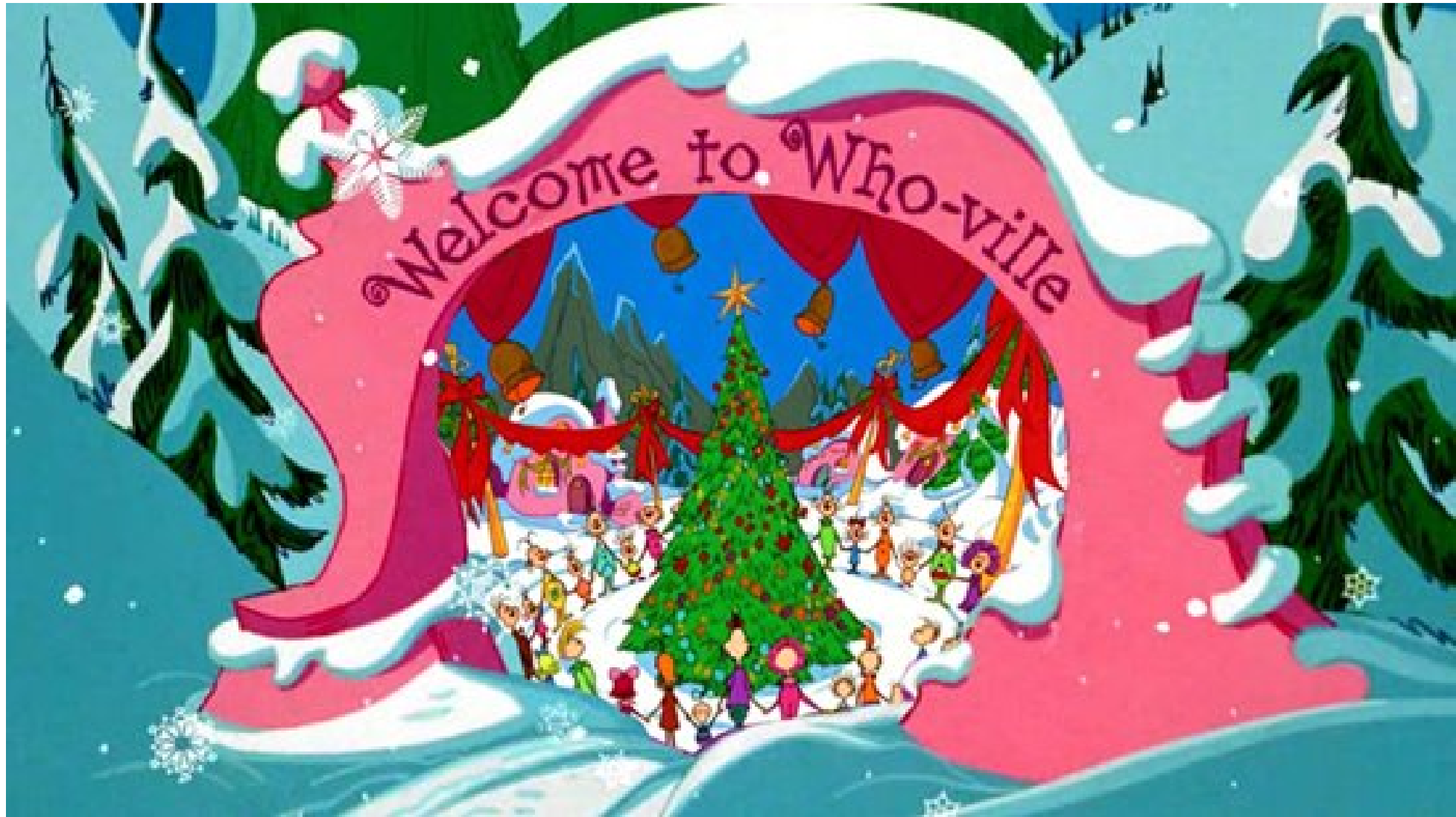


“Embrace regular and frequent exposure to users. 2 hours every 6 weeks.”

Jared Spool, User Interface Engineering



Who... is your customer?





Affinity Diagram for Synthesis

Who are your customers?

01

Write down

- Write down ideas on separate sticky notes.

02

Put

- Put sticky notes on the wall.

03

Group

- Group similar items.

04

Name

- Name each group of customers.

05

Vote

- Vote for most "important."



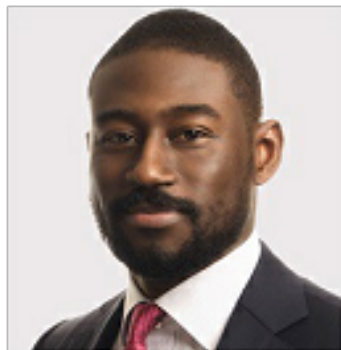
What...is a persona?



What is a persona?

A fictitious, specific and concrete representation of a target customer group for a product, experience, or policy. Provides an actionable narrative that leverages research, as well as internal understands.

Christopher: Policymaker

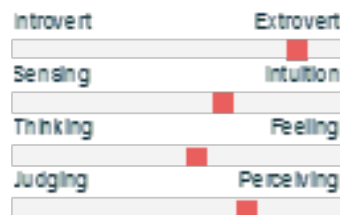


"I support federal policy positioning with compelling evidence."

Work: Legislative Assistant
Sector: Federal Government
Location: Washington, DC
Education: MA
Age: 34
Family: Engaged

Personality

ENFP: The Campaigner



Use Cases

- Seeks evidence-based publications from trusted policy research sources to determine or validate a policy position
- Wants specific facts quickly and appreciates descriptive project overviews
- Uses impact stories and metrics to gain momentum around a policy narrative
- Reads policy commentary and blogs to understand and anticipate varying or conflicting perspectives around a topic
- Stays up-to-date on research that pertains to current events

Opportunities

- Quick access to news and commentary within a focus area or sub-topic
- Bulleted executive summaries filled with facts and impact narratives on publication detail pages and project landing pages
- More precise and accurate search capabilities
- Quick and clear paths to focus areas and sub-topics
- "You Might Also Like" content for closely related publications / content from different projects

Bio

Christopher supports a member of Congress in finely crafting policy positioning based on extensive research. He wants definitive answers, works quickly, and is eager to satisfy leadership. Christopher has strong leadership traits, is people-oriented, and always has talking points on subjects pertaining to his work and current events. He has experience in the private sector, but intends to spend the rest of his career rising in the ranks of government.

Outside of work he is very social, enjoys health and fitness, volunteers, and attends networking events on Capitol Hill, such as award ceremonies. He also enjoys trying new restaurants in D.C. with his fiancé.

Key Touchpoints

Project Landing Pages



Publication Detail Pages



Publications Search



Latest News



Blogs



Websites Frequented





persona:

Molly

CONSCIOUS CONNECTOR

Life Stage: Student or single < 35

PERSONAL INFO

Age: 29

Marital Status: Single

Occupation: Working—Retail Sales Manager

KEY MOTIVATORS

- Engaging in causes/ organizations working toward the greater good
- Environmental stewardship

INTERESTS

- Photography
- Travel outside of the U.S.

MEDIA BRANDS

NETFLIX Instagram

THE AMAZING RACE BuzzFeed

DAILY ROUTINES:

WEEKDAYS



Work
(Retail Sales
Manager)



Photography



Volunteering



Online
shopping

WEEKENDS



Travel



Nature hikes

DESCRIPTION

Molly, 29, is a highly creative and very visual person who lives in a large city. While she owns and uses a digital SLR camera, Molly is just as likely to snap photos with her iPhone and share them on her social networks, along with other content she's curated online. Molly cares deeply about our planet and feels a responsibility to help keep it green. She makes certain her friends and family are doing their part, too. Molly loves socially conscious brands like TOMS and is a big fan of the micro-lender *kiva.org*. She shows support by both contributing money and evangelizing her favorite causes. Molly's decision to work for REI aligns with her commitment to stewardship of the planet and her love of travel and adventure. She's always planning her next trip with inspiration from Instagram and help from Groupon Getaways, TripAlertz, TripAdvisor, and various travel blogs. Travel is a defining part of who Molly is; she loves immersing herself in new cultures and experiencing life as a local.



Katrina
Product Designer

"My friends and family think I spend most of my time designing what things look like, but the truth is that that is only 10% of my job."

Katrina
Product Designer

Goals
Katrina wants to gain a better understanding of users and their problems to see teammates. She wants to help them envision better solutions to those problems.

Needs
Katrina needs to turn research into something her team can absorb quickly. She wants to spend less time fiddling with details and more time on the big picture.

Role Product Designer
Industry Health / Medical
Time in industry 2 years
Education MBA
Tools Ethical, Lookback, Google Docs, Sketch, and InVision

Personality Introverted Extroverted

Skills Big Picture Detail

Learning Reading Podcasting

Letter A B C D E

Research

Design

Product Development

Analysis

Information Architecture

Content Strategy





 NATIONAL
GEOGRAPHIC

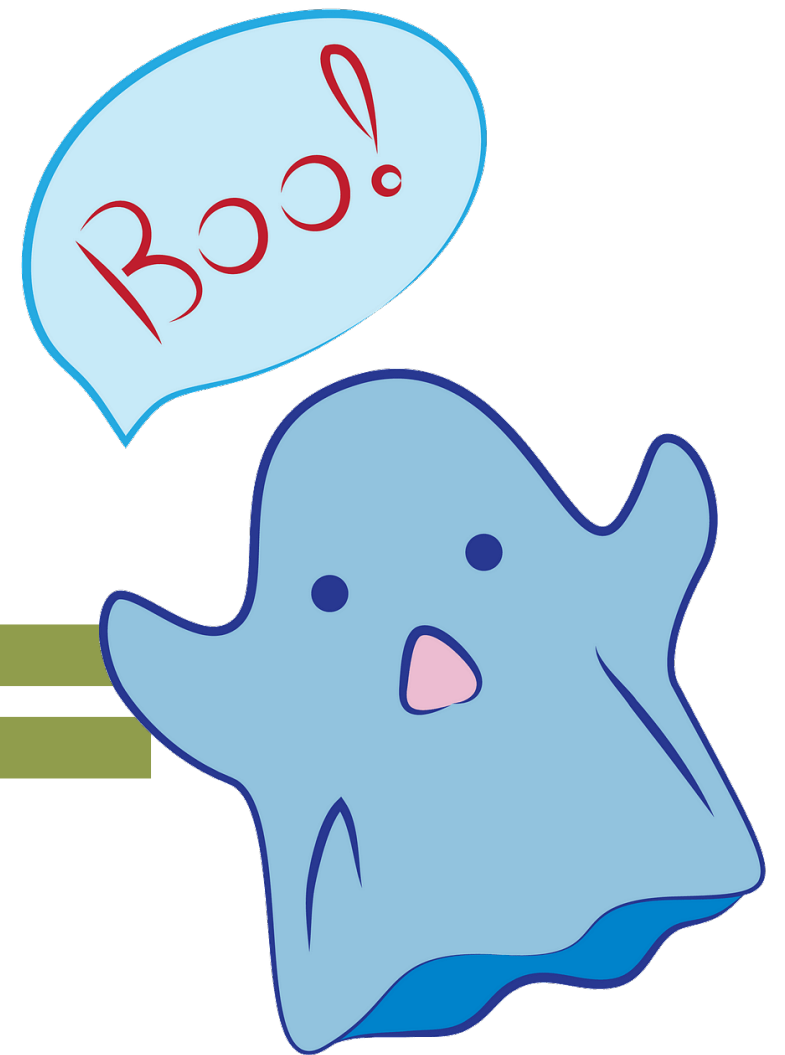
Personas are
not documents.



Why... use personas?

1.

Personas make assumptions and knowledge about **customers explicit**, creating a common language to meaningfully discuss customers.



2.

Personas allow you to **focus on and design for a set of specific customers** (who are not necessarily like you), helping you make better decisions.

Mathematica Policy Research... key personas



**POLICY
RESEARCHER:**
PATRICIA



POLICYMAKER:
CHRISTOPHER



**PROGRAM
ADMINISTRATOR:**
LISA



**PROSPECTIVE
FOUNDATION
CLIENT:**
MARK



**MEDIA
INFLUENCER:**
ANDREW



Mark:
Prospective
Foundation
Client

Key Opportunities

- Redesign the homepage as an introduction to Mathematica to communicate its unique offering and brand positioning
- Elevate service-oriented navigation labels and wayfinding components



[Tools & Capabilities](#)

[People](#)

[Focus Areas](#)

[Resources](#)

[Centers](#)

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M Paul Decker
President & CEO, Mathematica Policy Research

Learn More About Mathematica

Paul Decker talks about our unique, rigorous approach.

[Watch the video](#)



Our **Featured Multimedia**

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March 27, 2019
[Do Suspensions Affect Student Outcomes? >](#)

March 13, 2019

Progress together

Mathematica's expertise at the intersection of data, methods, policy, and practice helps improve well-being around the world. We collaborate with our partners to translate big questions into insights that enrich programs, refine strategies, and enhance understanding.

[VIEW VIDEO >](#)

TOPICS IN THE NEWS

[Work Requirements in Government Benefit Programs >](#)

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Featured Evidence & Insights

[Real-Time Feedback Makes an IMPACT >](#)

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[Helping Connect Youth to Jobs, Apprenticeships, and Internships with More Timely and Detailed Data >](#)

BLOG POST - DEC 04, 2019

[New Tools for Improving Attendance in Pre-Kindergarten and Kindergarten >](#)


NEWS - DEC 03, 2019


[New Toolkit Highlights How Medicare Accountable Care Organizations Engage Beneficiaries >](#)

NEWS - DEC 03, 2019



SERVICES & PRODUCTS

 [Research & Evaluation >](#)

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BY SECTOR

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[Commercial >](#)

[Foundations >](#)

[International Aid Agencies >](#)

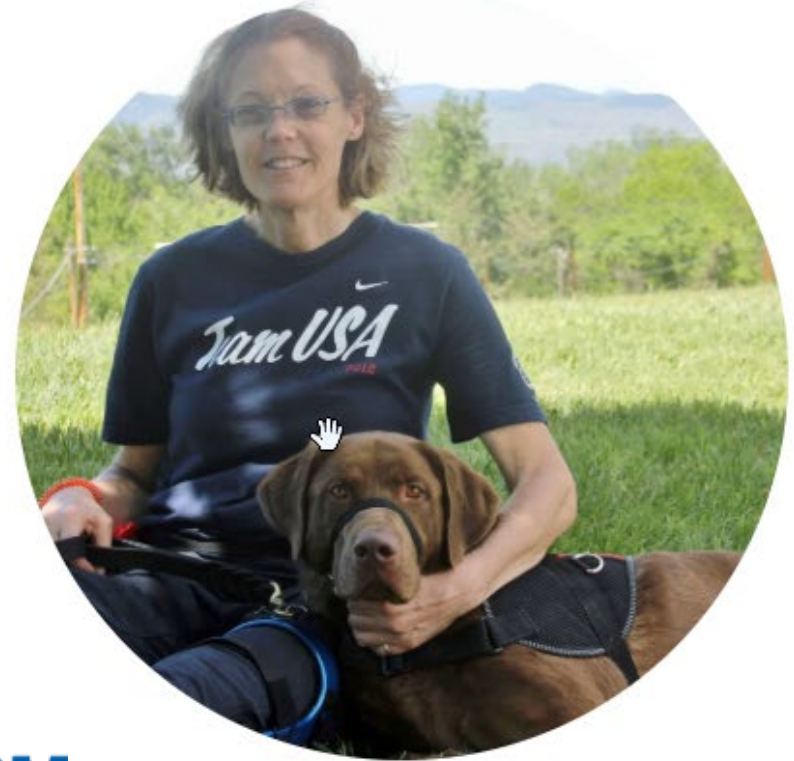
3.

Personas **generate interest and empathy toward users**, engaging your team in a way that other representations of data cannot.

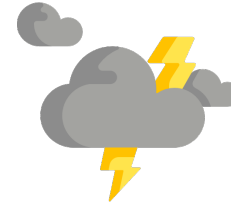
“Decker has opened my world for me. I used to be afraid to leave my house because of all the people I would come into contact with, but Decker protects my space and makes me feel safe. He keeps me balanced while walking so I don’t have to use my walker or four-wheeled cart. Each night, I look Decker in the eyes and explain how thankful I am for him.”

DIANNA

An Army Veteran, was matched with her service dog, Decker, in 2014



Storytelling Strategy for Non-Profits to Generate Empathy + Encourage Giving



Introduce the main character

Begin with a startling fact/stat

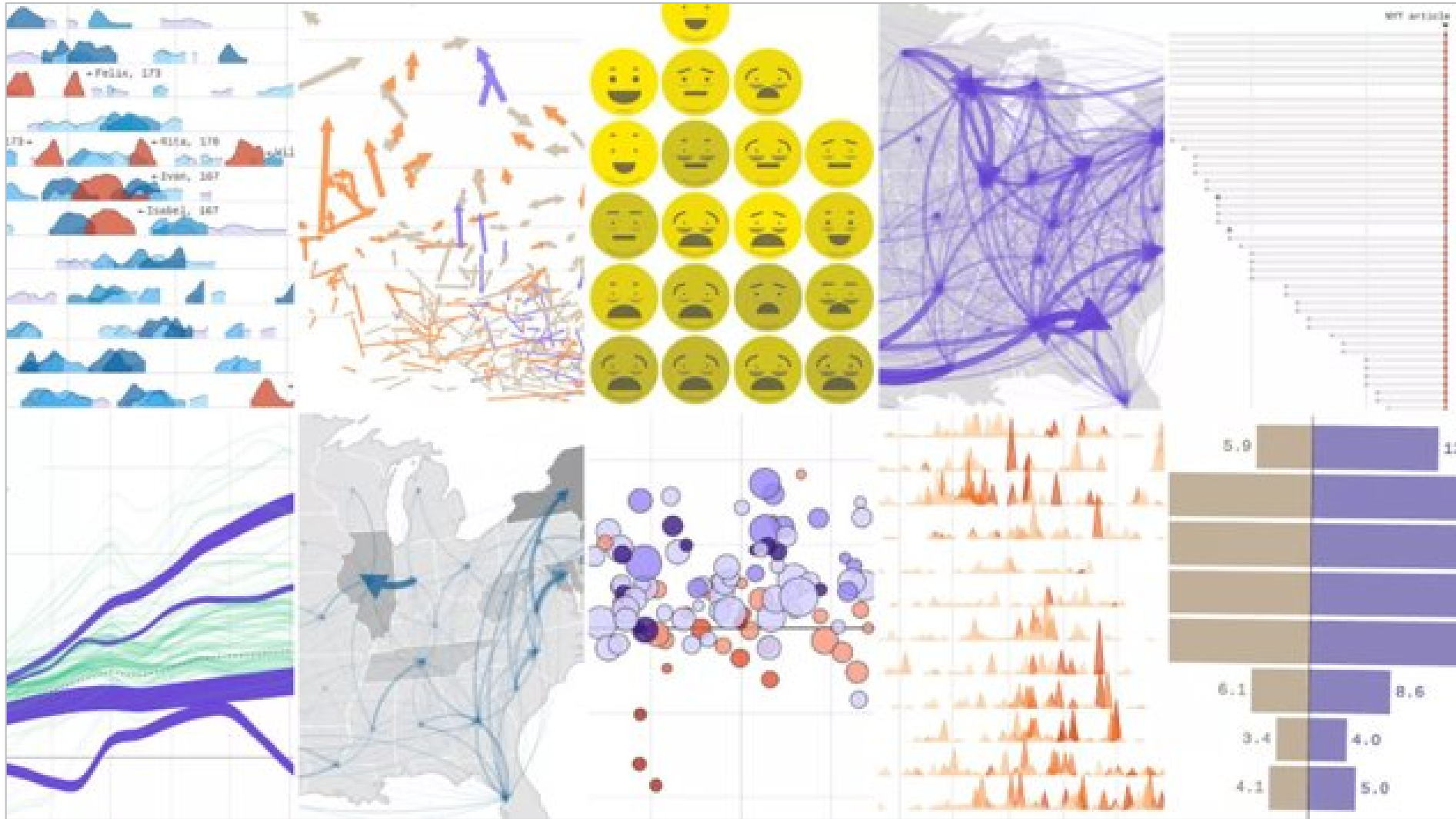
Immerse your audience in a moment of conflict

Make your cause a quest

4.

Personas help us overcome drawbacks of data **alone** and humanize insights with a narrative.





5.

Personas leverage human psychology toward fictional characters and allow us to predict outcomes.

the muppets.



REMINDER:

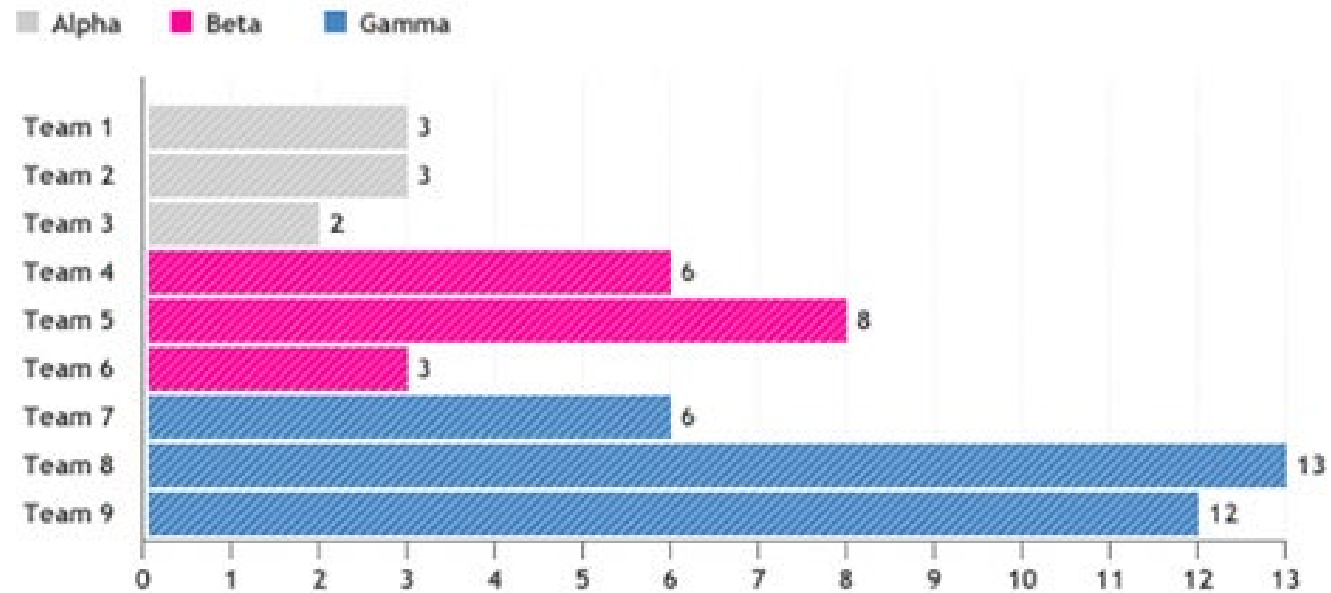
Personas are
not documents.

6.

Research suggests that experiences designed with personas are preferred by customers.

Study on the Effectiveness of Personas

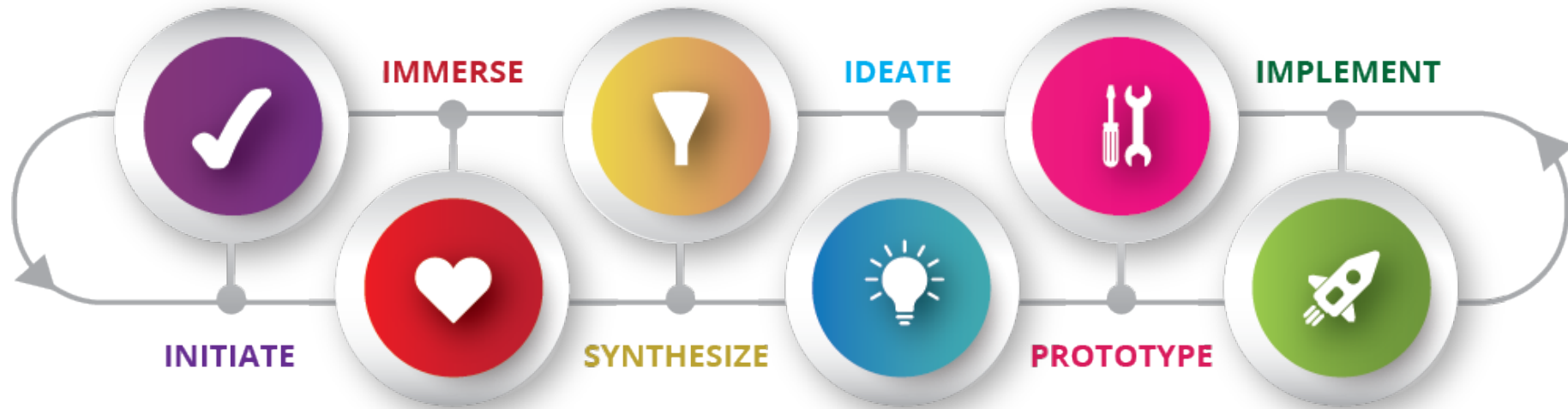
Total Heuristic Score by Team



COFFEE BREAK



When... to use personas?



1. Initiate

- **Goal:** Create a shared understanding of the problem that you're trying to solve. Define who, what, where, why, and how.
- **Tips:**
 - Ground the problem to be solved in the context of a specific persona(s)
 - Onboard teammates to project in context of persona(s)

2. Immerse

- **Goal:** Gain empathy by talking to and observing customers.
- **Tips:**
 - Recruit participants that share traits with your target persona(s)
 - Focus on creating a persona that evokes empathy by communicating more than facts

3. Synthesize

- **Goal:** Sense-making by gathering available research / data / information to find themes, organizing into patterns and discovering insights.
- **Tips:**
 - Story tell data through the lens of the persona(s)
 - Refine personas leveraging insights from Immerse

4. Ideate

- **Goal:** Ideas without limits.
- **Tips:**
 - Hold brainstorming workshops to generate ideas to problem solve for the persona(s)
 - Define the customer journey to uncover unmet needs for a specific persona

5. Prototype

- **Goal:** Reduce your ideas to those that are desirable, feasible and viable, and make as interactive as possible so you can get feedback about the experience.
- **Tips**
 - Present concepts in the context of persona(s)
 - Conduct balanced research to validate concepts with participants who represent key personas

6. Implement

- **Goal:** Continue to iterate, refine, and engage based on user feedback and metrics.
- **Tips:**
 - Create ongoing optimization strategy to continue to improve the product/experience/policy for the persona(s)
 - Consider new strategies for secondary persona(s)

Repeat.

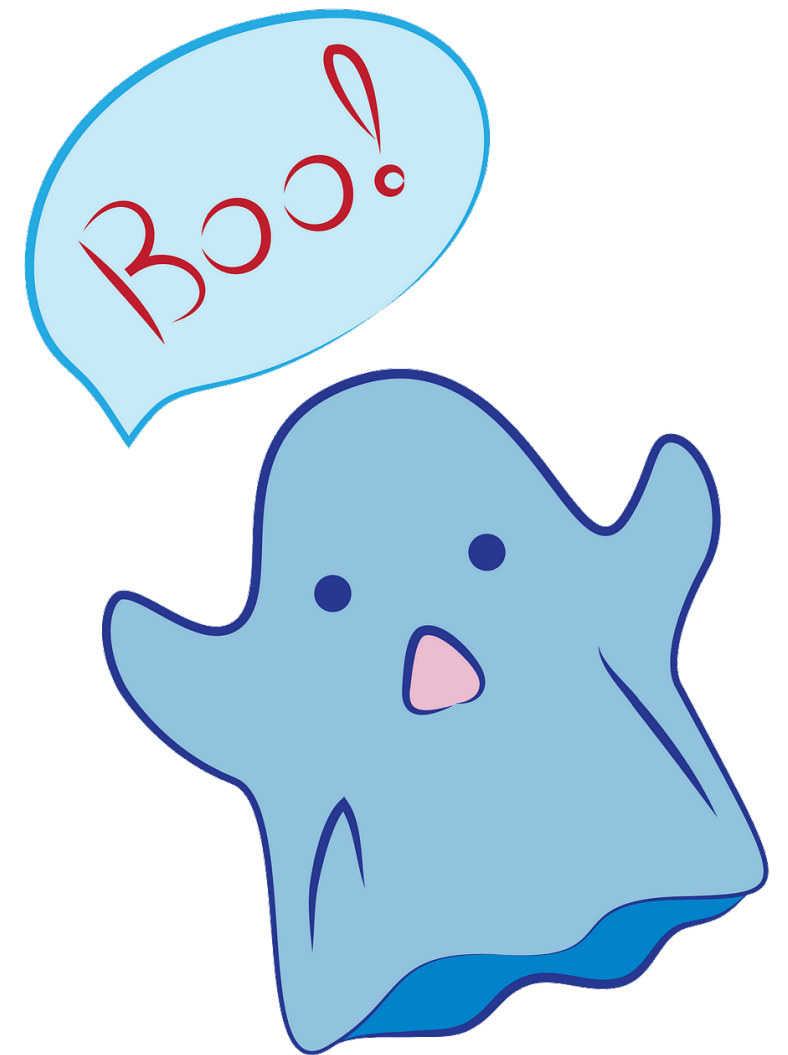


How... to create a persona?

Data



Personas



Lowest Effort

Most Effort



Least Data

Most Data

Lowest Effort

Most Effort



Little
Research

Qualitative
Research

★ Qualitative +
Quantitative
Research

Time to Create:

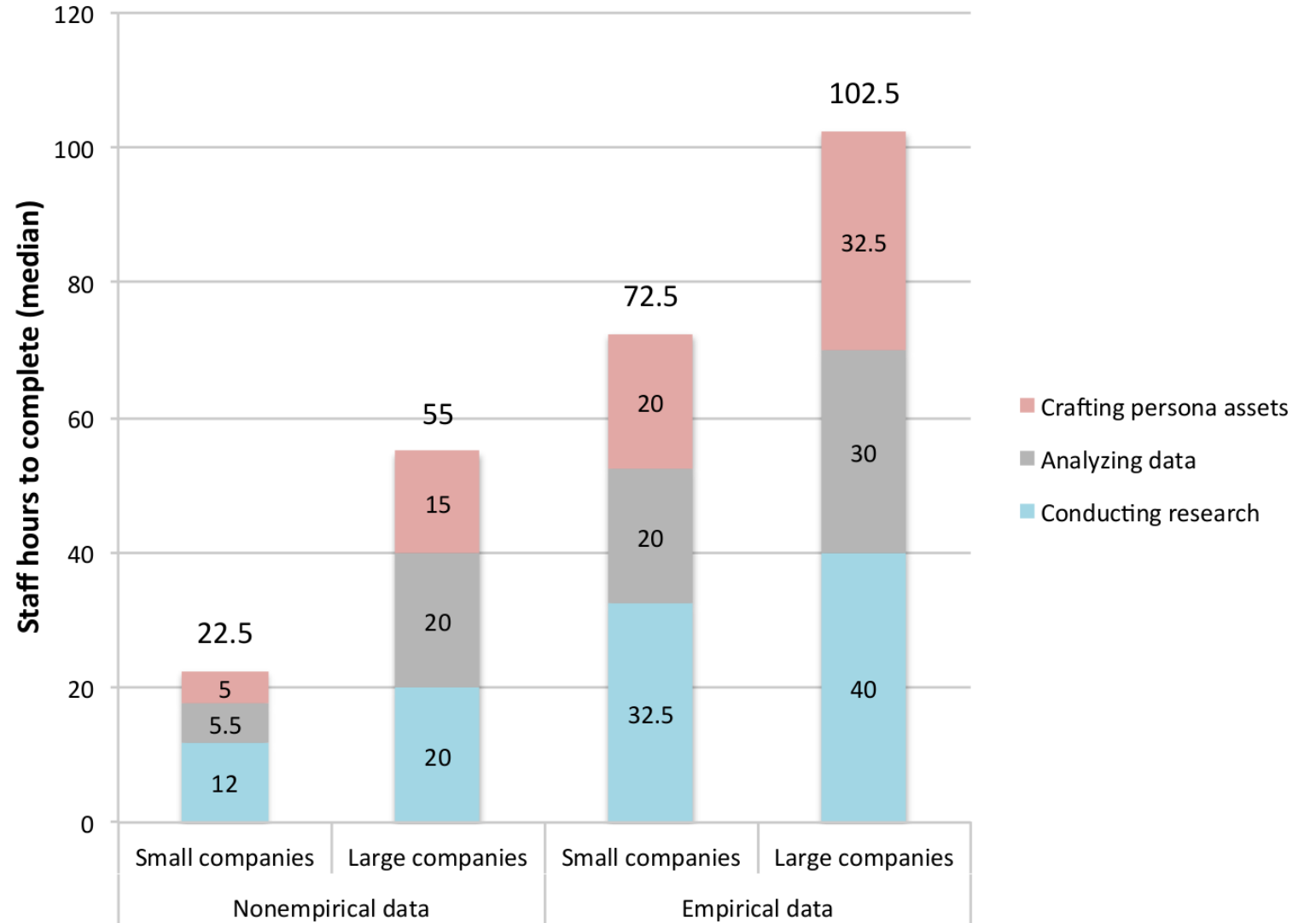
Survey of 216 Design
Professionals

Median time spent ranged from 22.5 - 102.5 staff hours.

- Small companies (500 employees or less)
 - 1 employee = 3 - 9 working days
 - 2 employees = 1.5 - 5 working days
- Larger companies (501+ employees)
 - 4 employees = 2 - 4 working days

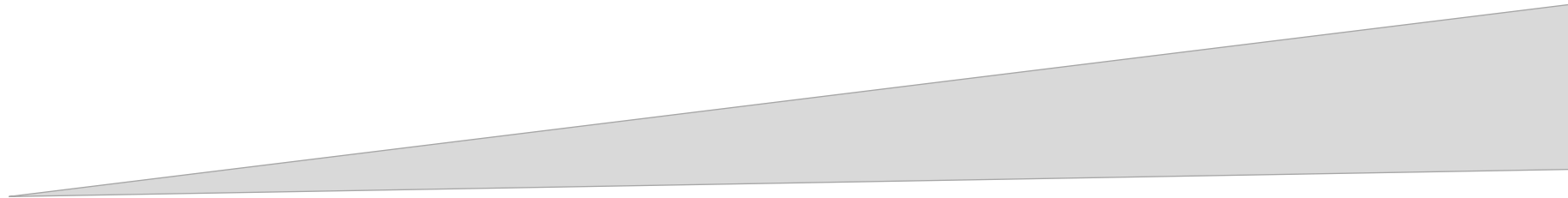
Time to Create:

Survey of 216 Design Professionals



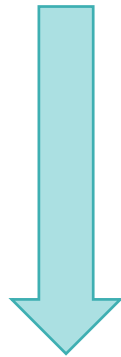
Lowest Effort

Most Effort



Least data

Most data



Proto-persona

Proto-persona

1. Non-research-based articulation of a customer segment
2. Collaborative: guided brainstorm of people with different viewpoints
3. Transfer knowledge and gain alignment
4. Frames assumptions as hypotheses with a plan for validation through research



Proto-persona Workshop

Goal: Identify all possible personas to target and workshop through character development as representation for key personas

- Proto-personas have 4 quadrants
- Bring blank paper and markers for brainstorming
- Groups/individual brainstorm at least 3 personas



Step 1: Character Development Quadrants

Name + Picture	Behaviors + Beliefs
Demographics	Needs + Goals



Proto-persona Workshop

Step 1: Character Development Quadrants

- Name considerations
 - Names can be serious or playful. For playful names consider alliteration (e.g. Regina the Rocket Scientist)
 - What is the age of your persona? Think of common names from the decade when they were "born." (See SSA online resource: <https://www.ssa.gov/oact/babynames/decades/>)



Proto-persona Workshop

Step 1: Character Development Quadrants

- Picture considerations
 - Higher fidelity is preferred and helps to create a concrete visual. Sketches are a good starting point but ultimately, we want to move toward specificity in all regards
 - Avoid overly stereotypical photos that characterize instead of humanize
 - Gold Standard: Find volunteers or hire models to do a photoshoot



Proto-persona Workshop

Step 1: Character Development Quadrants

- Behavior and beliefs considerations
 - Behaviors and beliefs related to your product are especially helpful
 - This might include related touchpoints on a site or journey map, attitudes and perceptions of a related experience
 - Broader



Proto-persona Workshop

Step 1: Character Development Quadrants

- Demographic consideration:
 - Common demographics include
 - Age
 - Location
 - Education
 - Household income
 - Marital status
 - Parental status
 - Demographic information should be validated through quantitative research (e.g. surveys)
 - For digital experiences, Google Analytics can be used for location and age




Proto-persona Workshop

Step 1: Character Development Quadrants

- Need and goal considerations
 - What motivates this persona?
 - What do they hope to accomplish?
 - What in their life is dependent on them accomplishing this goal?
- Examples might include:
 - Managing a health plan to improve condition
 - Reducing the burden of medical expenses to balance family budget

Proto-persona Workshop

Step 2: Prototype with Basic Information

<p>“Mary”</p> 	<p>Behaviors</p> <ul style="list-style-type: none">• Has a housecleaner• Buys take-away 3 nights/wk• Frequently feels overwhelmed when she “forgets” something
<p>Demographics</p> <ul style="list-style-type: none">• Working mom• 34 years old• Lives in Reading, works in London• Married, 2 kids• Household 125k/yr	<p>Needs & Goals</p> <ul style="list-style-type: none">• Help! Running errands, managing kids, keeping things running• Time for her girlfriends• To feel like she “has it sorted”• “To clone herself”



Proto-persona Workshop

Step 3: Meet the Cast

- Go around the room to each person and have them introduce and explain their persona
- Record any adjustments or insights discussed in real time



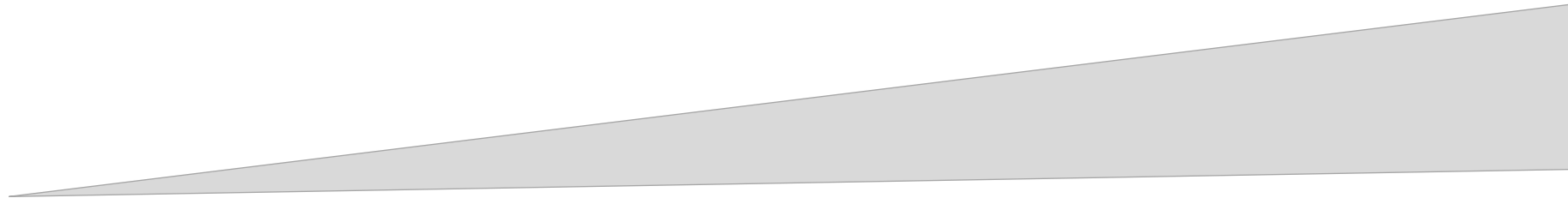
Proto-persona Workshop

Step 4: Refine Personas

- Collaboratively define dimensions
- Acknowledge themes in ideation around personas
- Identify missing information that would be useful
- Identify opportunities to validate assumptions with research

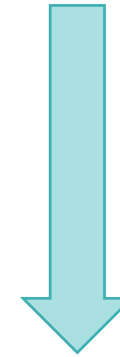
Lowest Effort

Most Effort

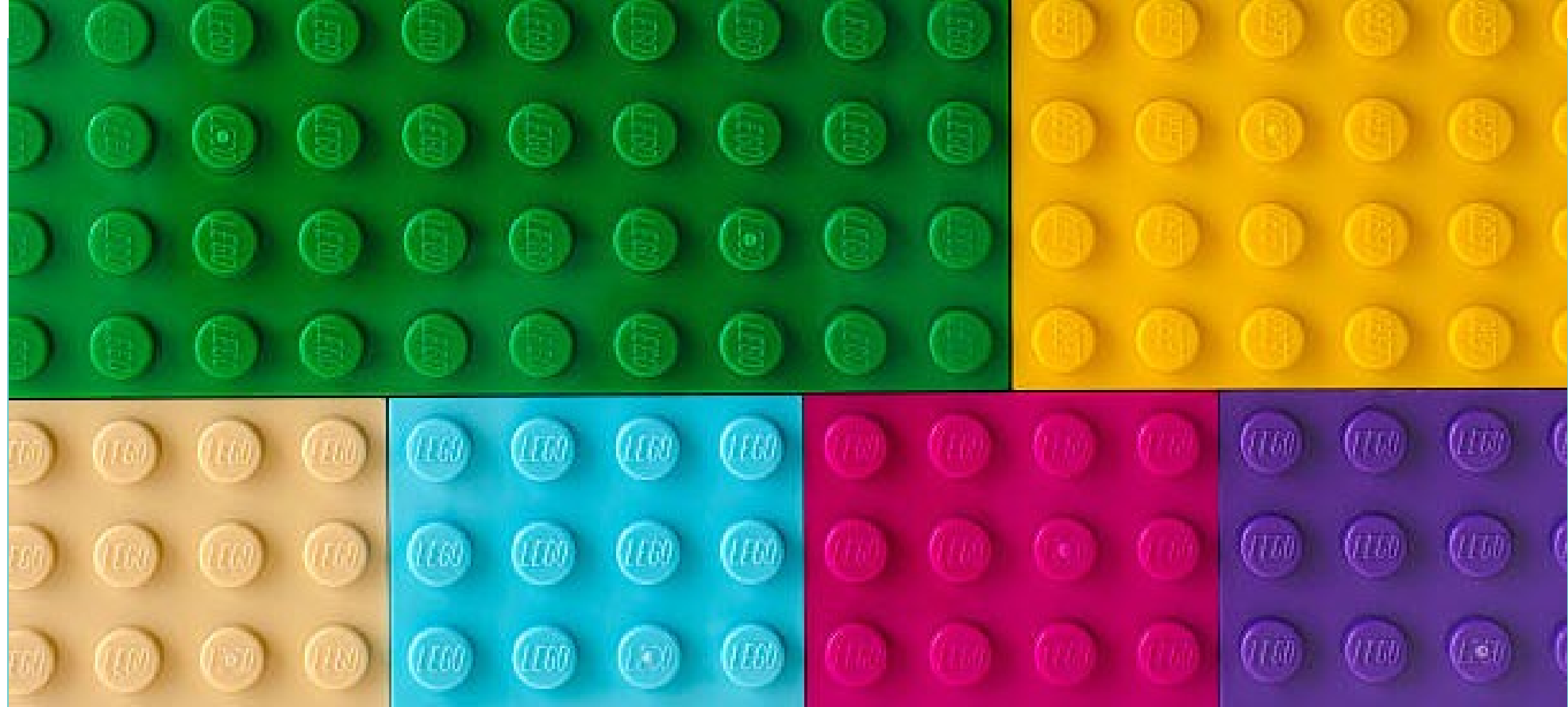


Least data

Most data



Persona



Persona Building Blocks

Persona Building Blocks

Quote adding a quote can underscore a persona's key motivations and illustrate vernacular.

- Considerations
 - Relate to motivations and unmet needs
 - Keep these short and to the point
 - Pull from qualitative research, if possible
 - Think about a movie you like. Is there a specific line from the main character that sums up the movie? What makes it great?

“Mama always said life was like a box of chocolates. You never know what you're gonna get.”

Forrest Gump

Persona Building Blocks

Role / Occupation can shed light on how your persona spend their days and even what hours they're available to engage with your product.

Considerations:

- Relate to anticipated education level
- Tie into values and personality type

Persona Building Blocks

Biography offer the most opportunity to tell the full narrative about the persona's life. You can include background and secondary information that doesn't neatly belong elsewhere.

Considerations:

- All details should be meaningful. Avoid getting carried away with too much information here (it's easy to do!)

Persona Building Blocks

Pain Points + Opportunities are an excellent way of aligning personas with project goals and motivate stakeholders with a common "quest."

- Focus on a few unique opportunities for the persona
- Have a concrete understanding of the problem and how the persona might experience it



Mark:
Prospective
Foundation
Client

Key Opportunities

- Redesign the homepage as an introduction to Mathematica to communicate its unique offering and brand positioning
- Elevate service-oriented navigation labels and wayfinding components

Persona Building Blocks

Day in the life of illustrates what a typical day looks like for your persona. This is a helpful context when planning for how your product does / doesn't fit in.

- Detail weekdays AND weekend for a fuller picture
- Pull from interviews when possible



DAILY ROUTINES:

WEEKDAYS



*Work
(Retail Sales
Manager)*



Photography



Volunteering



*Online
shopping*

WEEKENDS



Travel



Nature hikes

Persona Building Blocks

Superpower / Super tool encourages project teams to think of ideal solutions to customer problems by identifying "superpowers" that can help the common customer achieve extraordinary results.

Considerations:

- What makes this persona unique?
- What can they do (or need to do) that other personas can't?



LUNCH



Creation... let's make personas!

Empathy Map Canvas

Designed for:

Designed by:

Date:

Version:

The diagram is a large rectangle containing a stylized profile of a person's head. The head is divided into seven numbered sections, each with a specific question and sub-questions. The sections are:

- 1 WHO are we empathizing with?**
Who is the person we want to understand?
What is the situation they are in?
What is their role in the situation?
- 2 What do they need to DO?**
What do they need to do differently?
What job(s) do they want or need to get done?
What decision(s) do they need to make?
How will we know they were successful?
- 3 What do they SEE?**
What do they see in the marketplace?
What do they see in their immediate environment?
What do they see others saying and doing?
What are they watching and reading?
- 4 What do they SAY?**
What have we heard them say?
What can we imagine them saying?
- 5 What do they DO?**
What do they do today?
What behavior have we observed?
What can we imagine them doing?
- 6 What do they HEAR?**
What are they hearing others say?
What are they hearing from friends?
What are they hearing from colleagues?
What are they hearing second-hand?
- 7 What do they THINK and FEEL?**
This section is further divided into two sub-sections:
 - PAINS**
What are their fears, frustrations, and anxieties?
 - GAINS**
What are their wants, needs, hopes and dreams?

At the bottom of the head profile, there is a horizontal line with the text: "What other thoughts and feelings might motivate their behavior?"

Last updated on 16 July 2017. Download a copy of this canvas at <http://gamestorming.com/empathy-map/>

© 2017 Dave Gray, xplane.com

Create a Persona

- Proto-persona
 - Name + picture
 - Behaviors + beliefs
 - Demographics
 - Needs + Goals
- Persona Building Blocks
 - Quote
 - Role / Occupation
 - Biography
 - Pain points + Opportunities
 - Day in the life of
 - Superpowers/Super tools

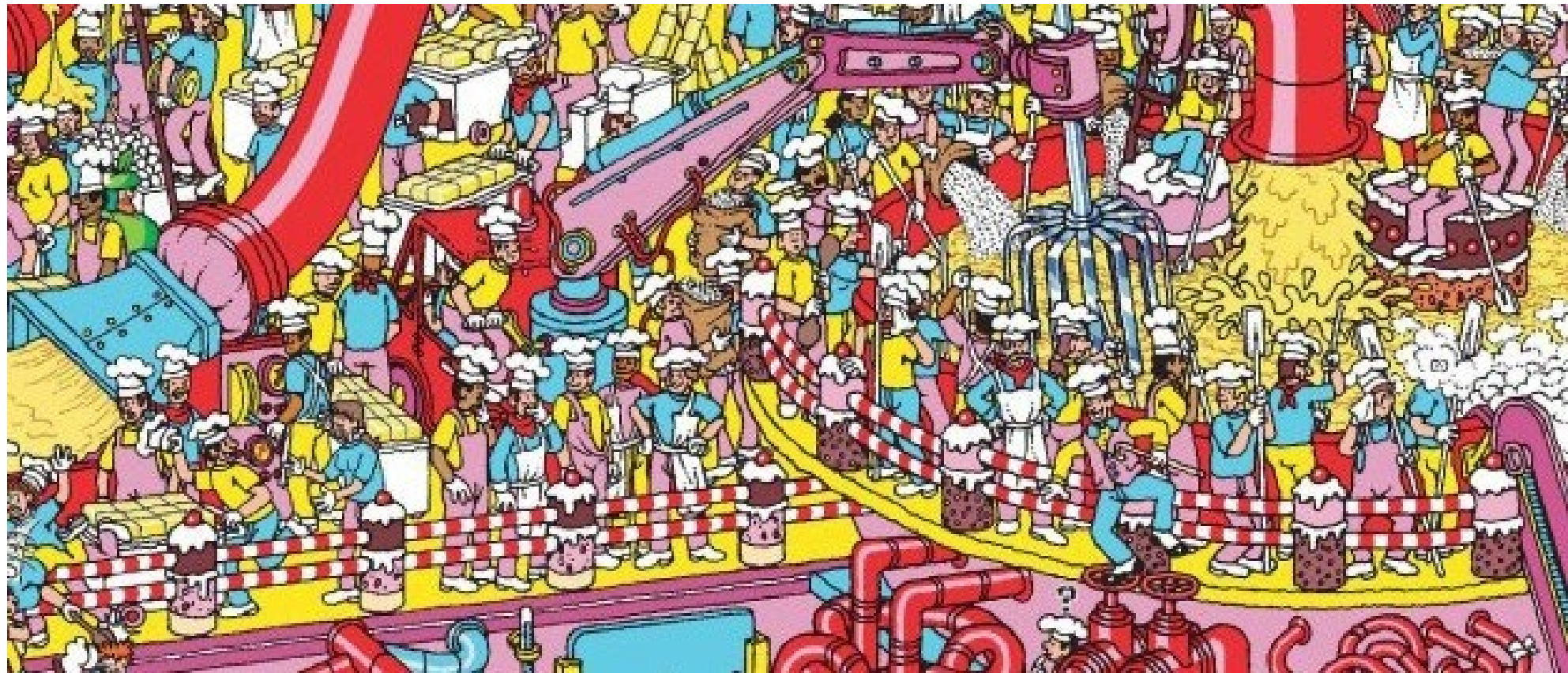


COFFEE BREAK



Application...

use personas in every role for decision making.

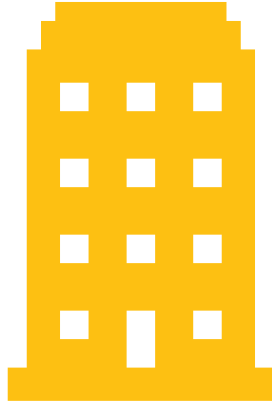


Applying Personas in Your Work



Kano Analysis

Business vs. Customer-Centered





MoSCoW

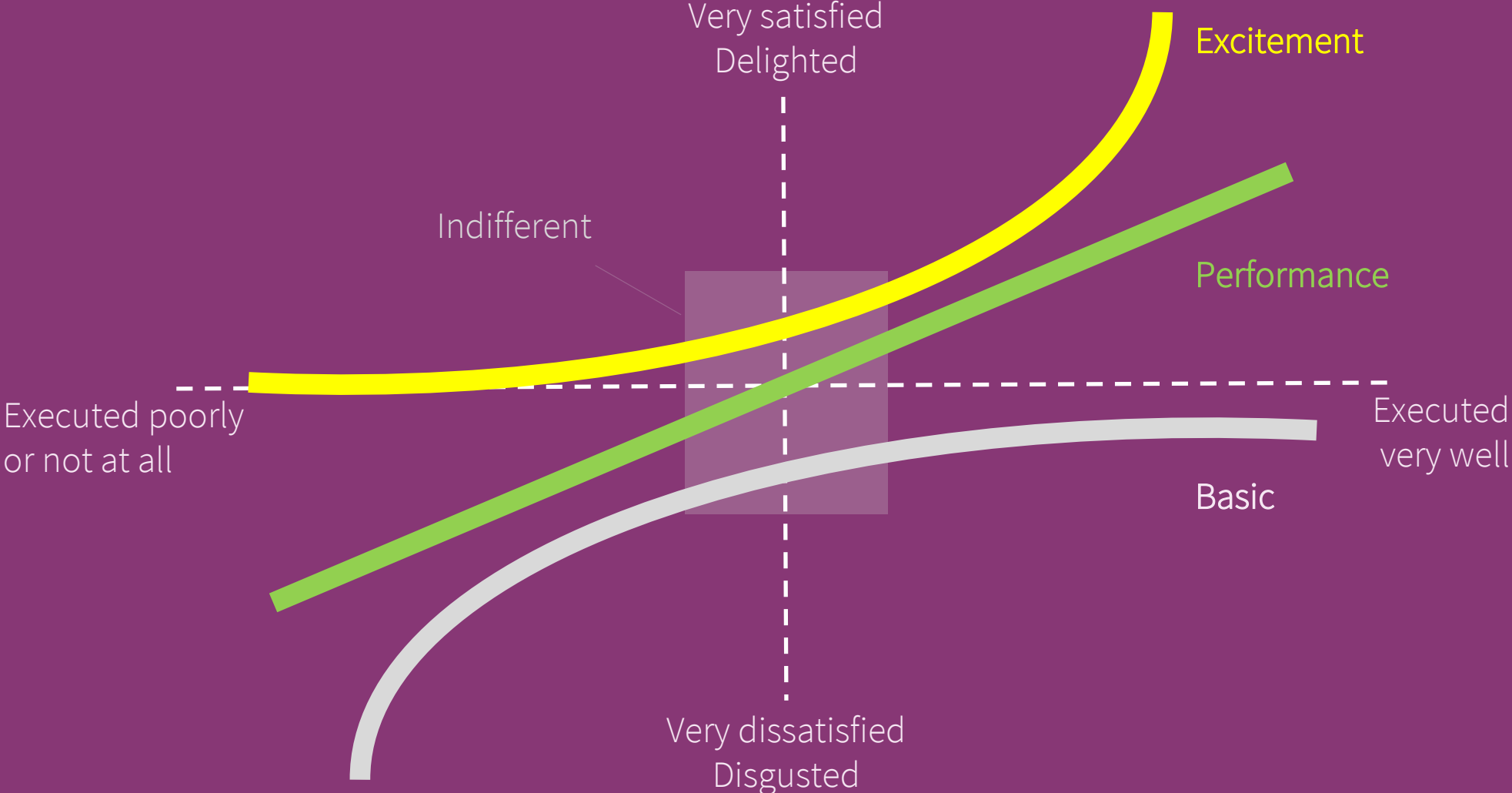
- Must
- Should
- Could
- Won't



Kano

- I would be delighted to find it that way
- I expect it to be that way
- I'm neutral
- I would not like it that way, but I can live with it that way
- It must not be that way

Kano Model



Excitement

Requirements

- Have greatest influence on how satisfied a customer will be
- These requirements are neither explicitly expressed nor expected by the customer
- Fulfilling these requirements leads to more than proportional satisfaction
- If not met, there is no feeling of dissatisfaction (not expected)

Performance Requirements

- Customer satisfaction is proportional to the level of fulfillment
- The higher the level of fulfillment, the higher the customer's satisfaction and vice versa
- These requirements are usually explicitly demanded by the customer

Basic

Requirements

- If not fulfilled, the customer will be extremely dissatisfied
- These requirements are taken for granted, so satisfaction not increased by fulfilling them
- If not fulfilled, the customer will not be interested in the feature set

Survey

Question Pairs

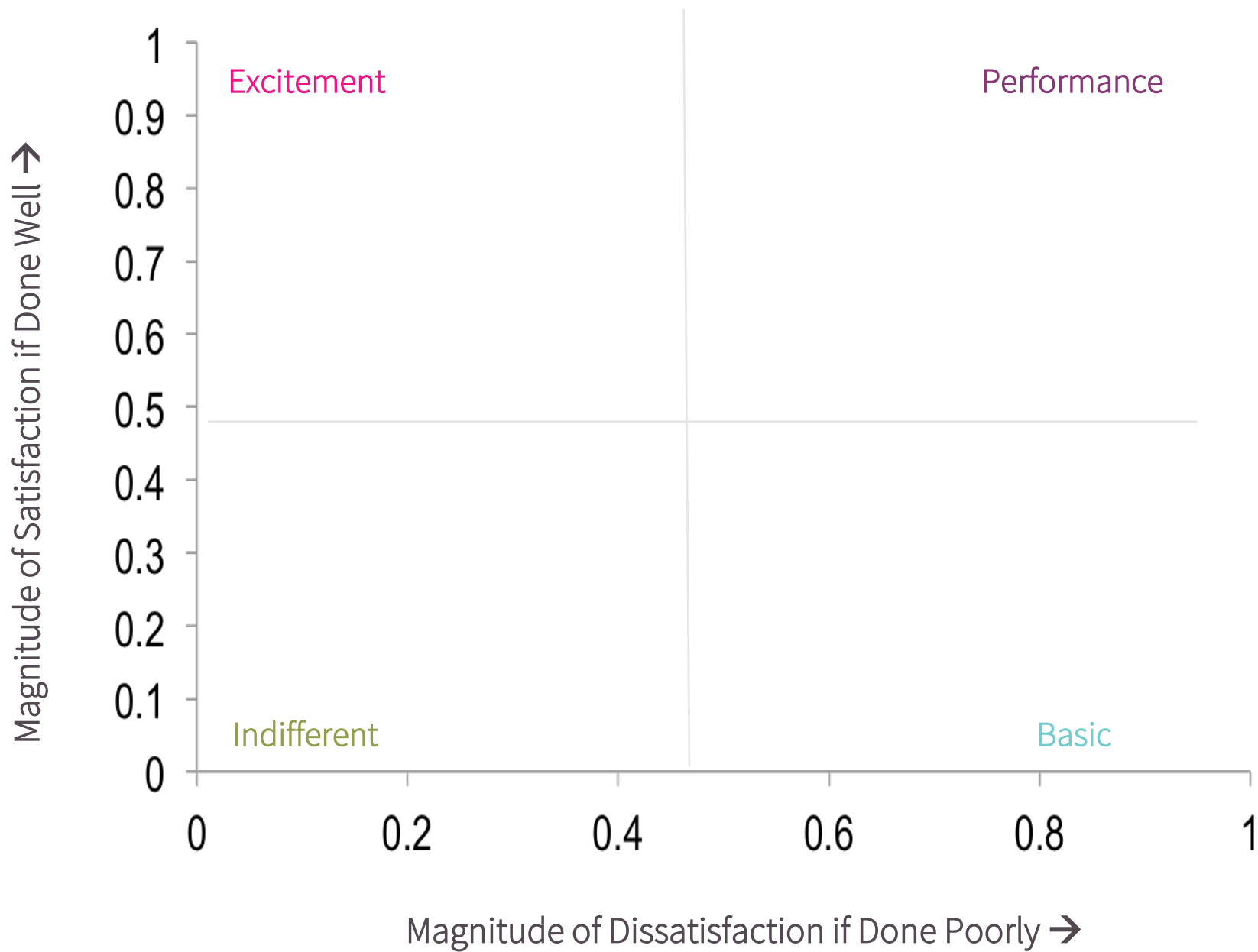
“How would you feel if you had
this feature?”

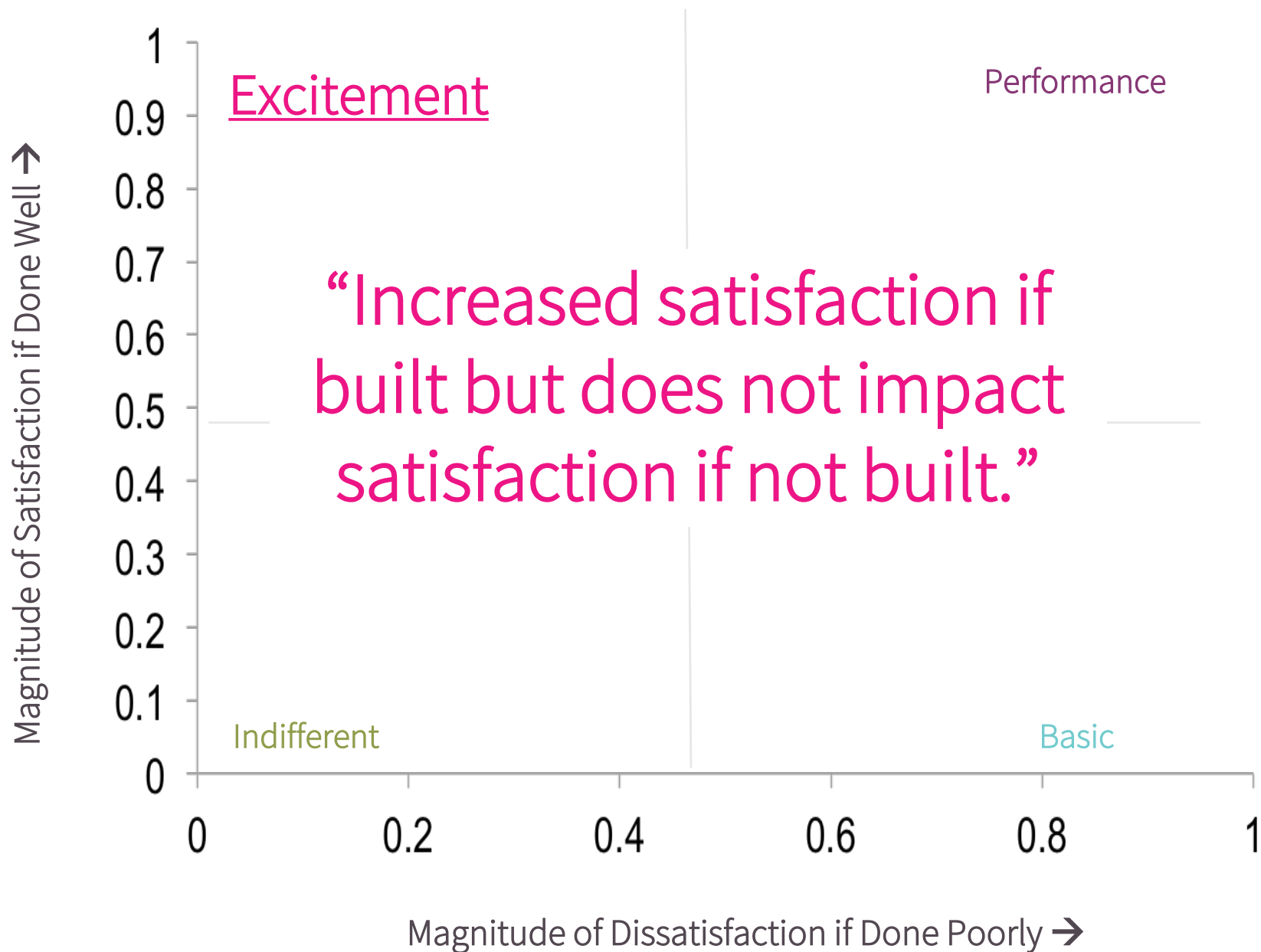
and

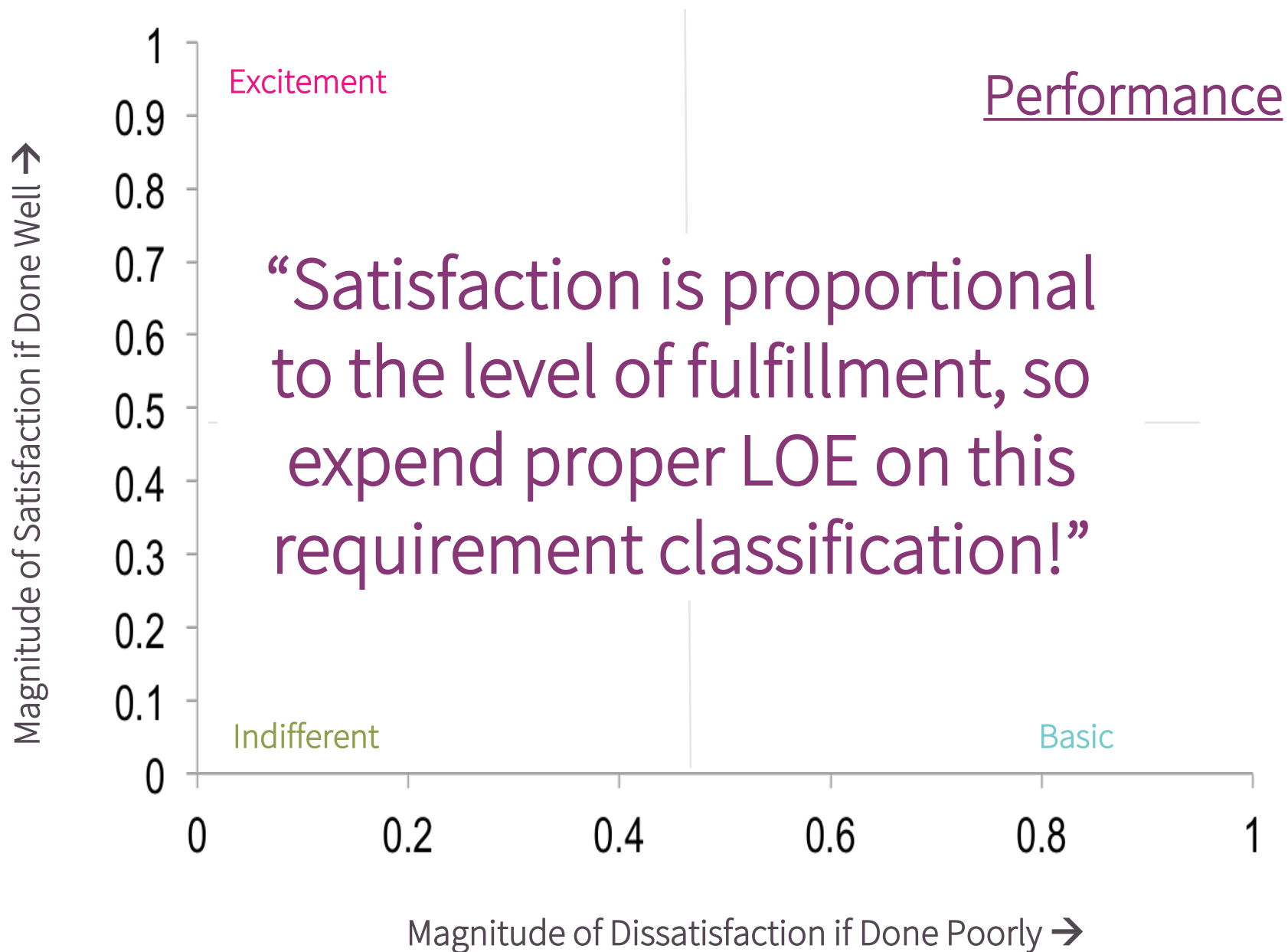
“How would you feel if you did
not have this feature?”

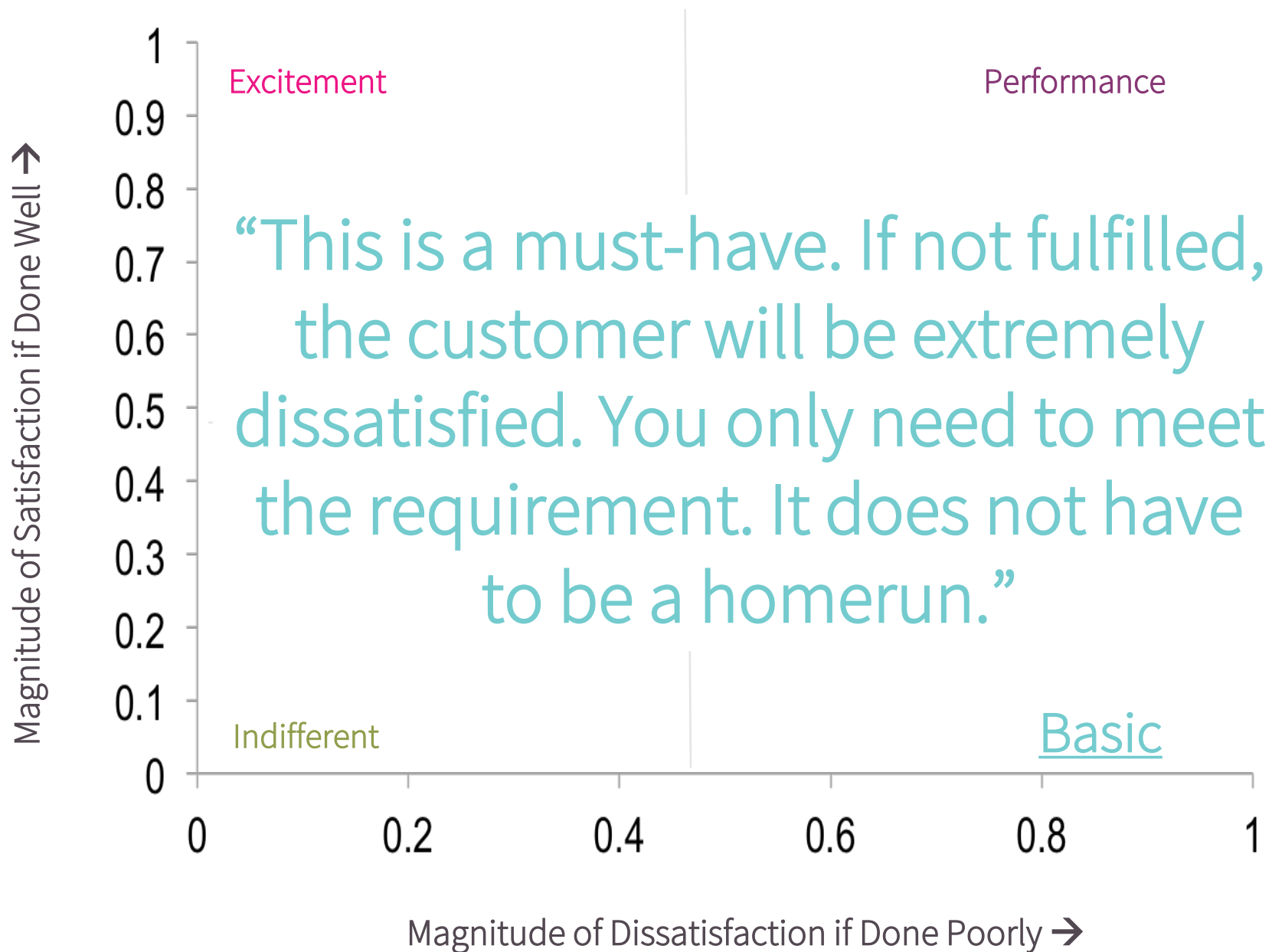
KANO Matrix

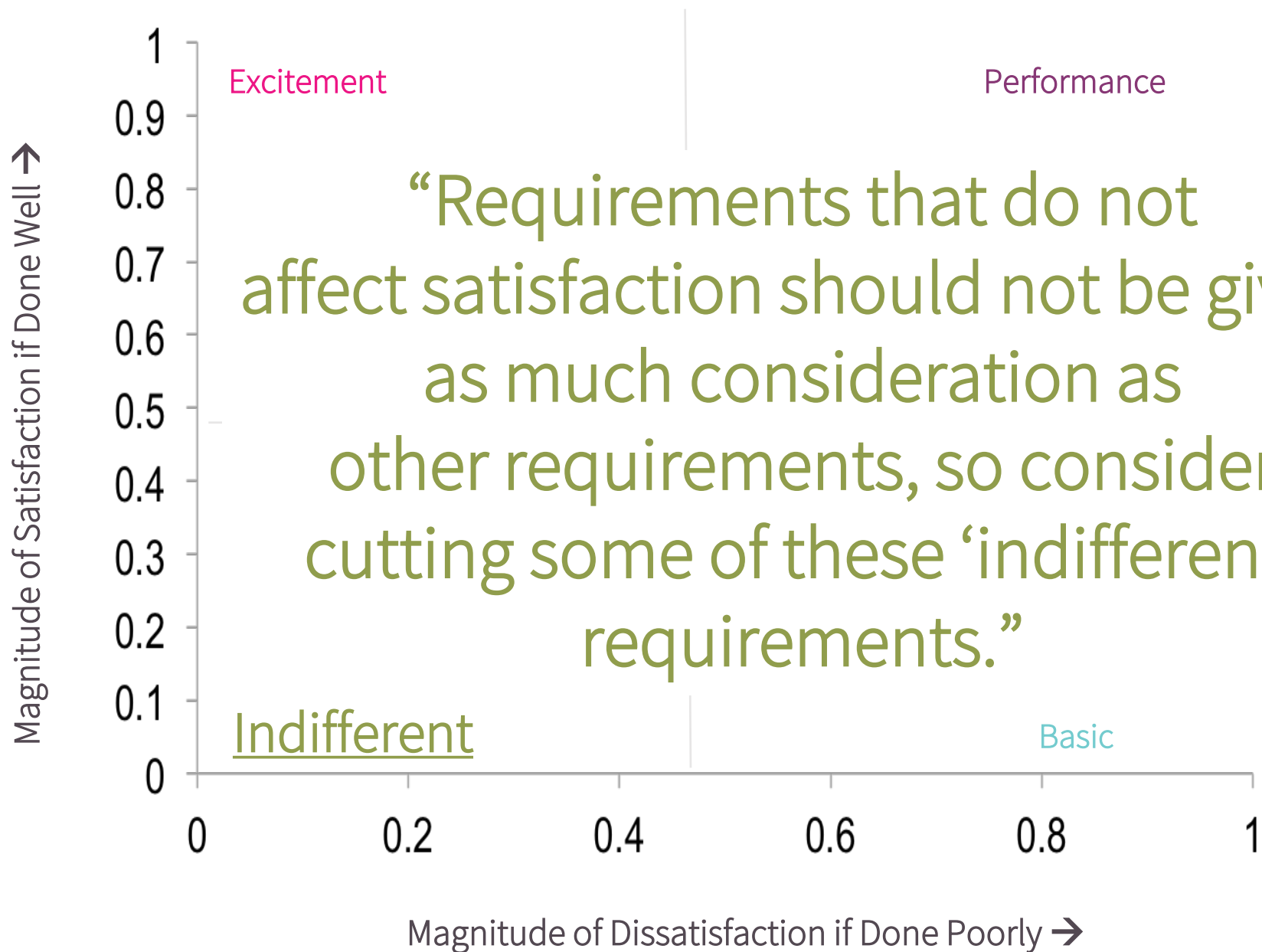
	Like	Expect	Neutral	Live With	Dislike
Like	Q	E	E	E	P
Expect	R	I	I	I	B
Neutral	R	I	I	I	B
Live With	R	I	I	I	B
Dislike	R	R	R	R	Q
B	BASIC				
P	PERFORMANCE				
E	EXCITEMENT				
I	INDIFFERENT				
R	REVERSE				
Q	QUESTIONABLE				



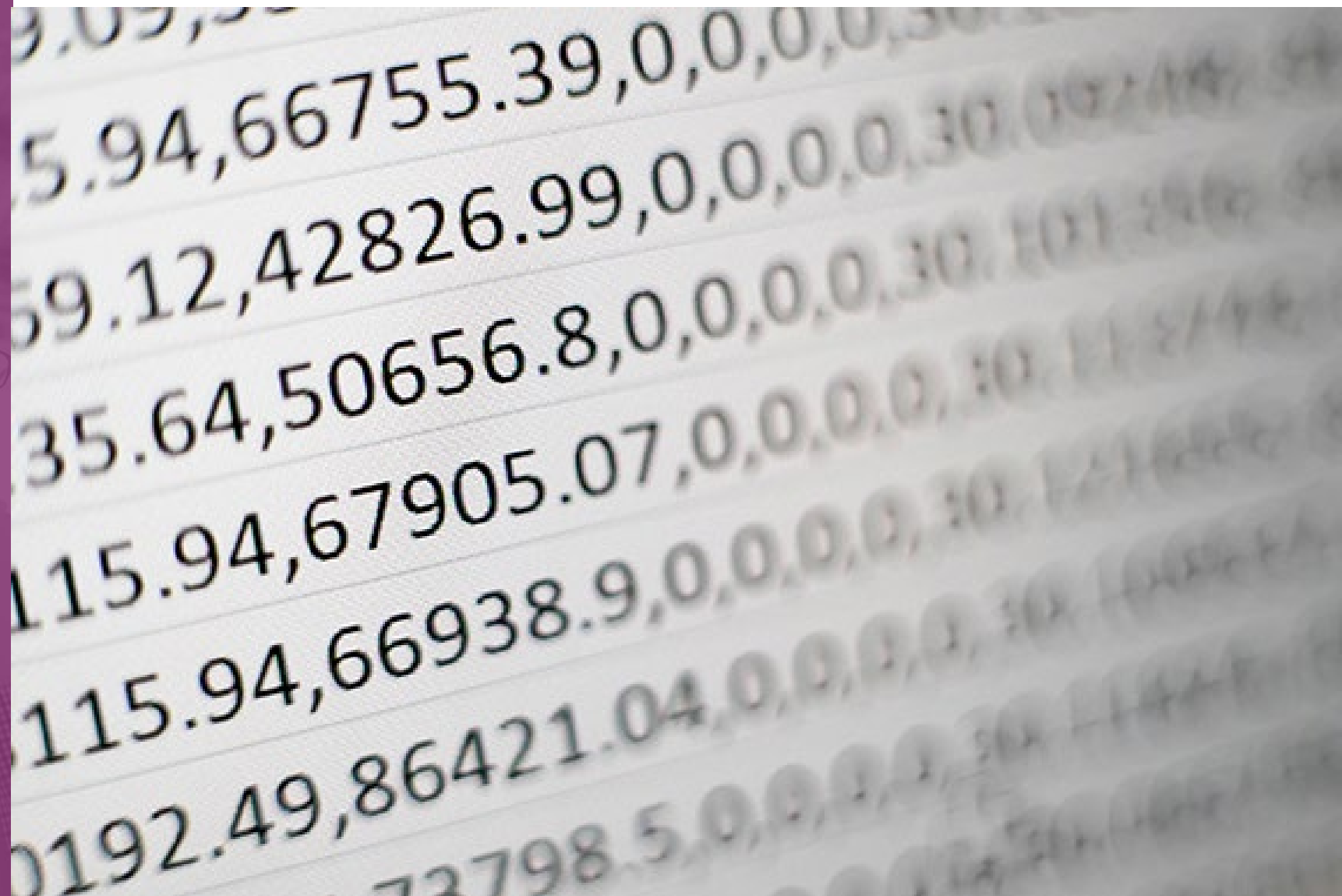


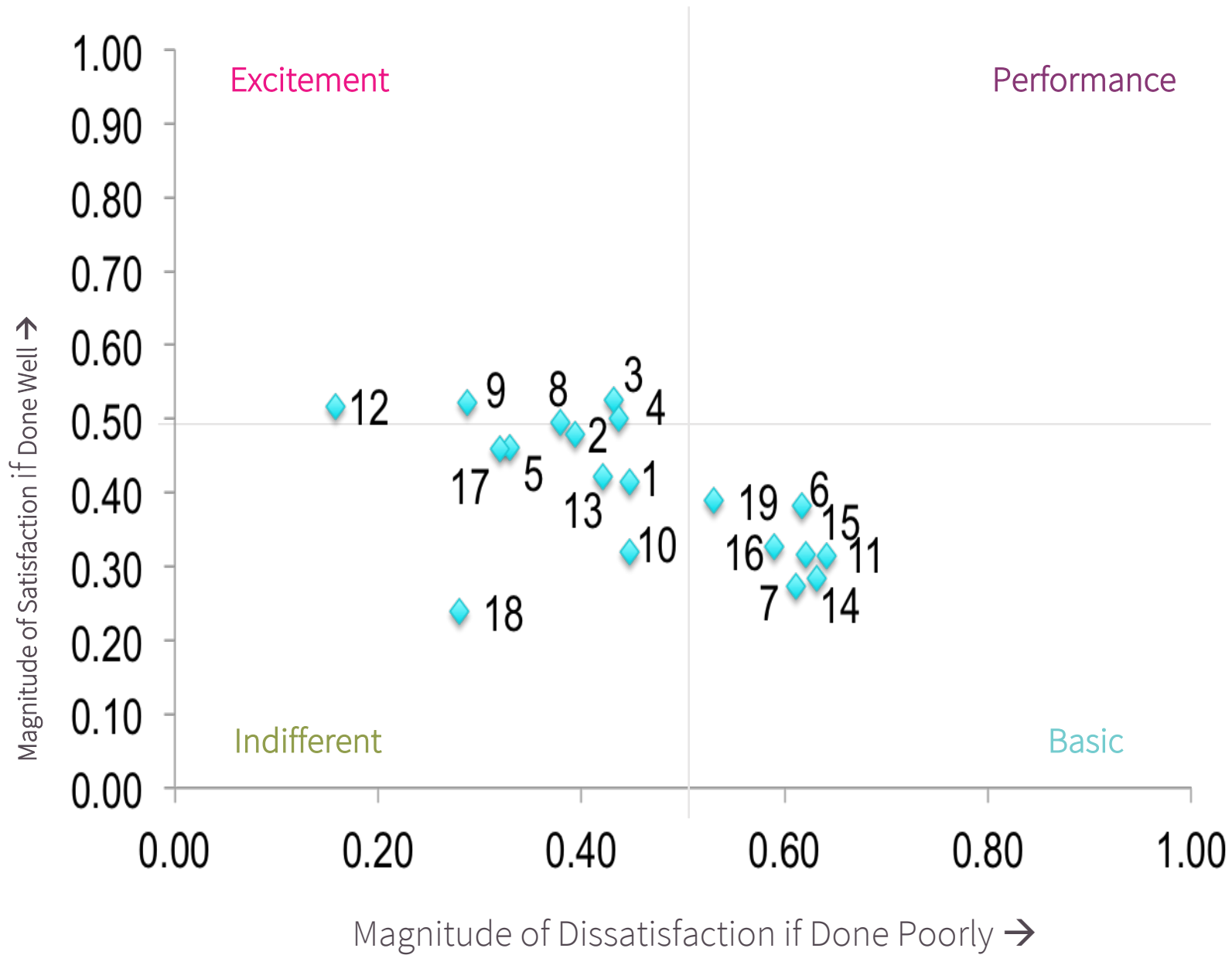




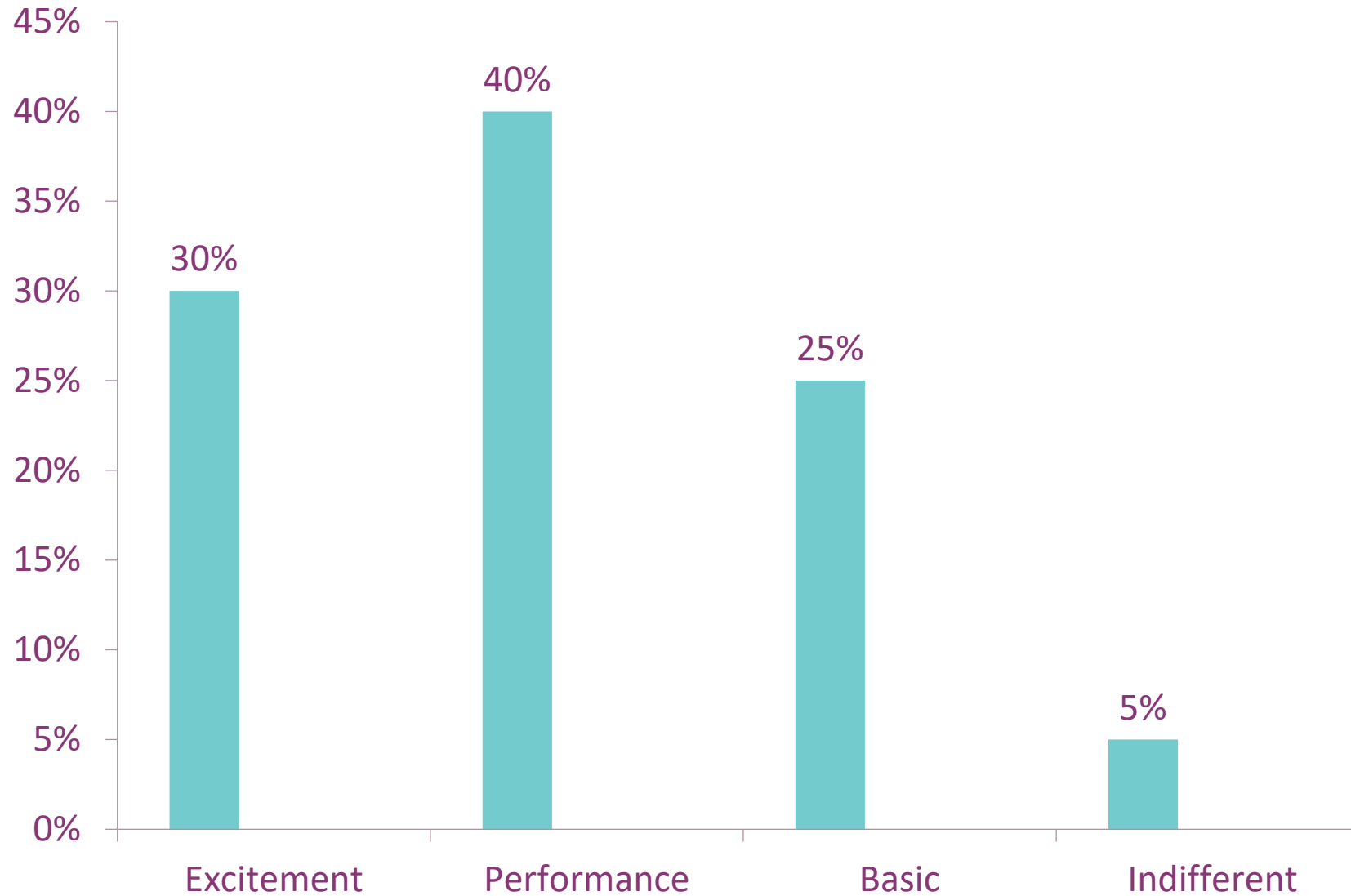


Example in Action



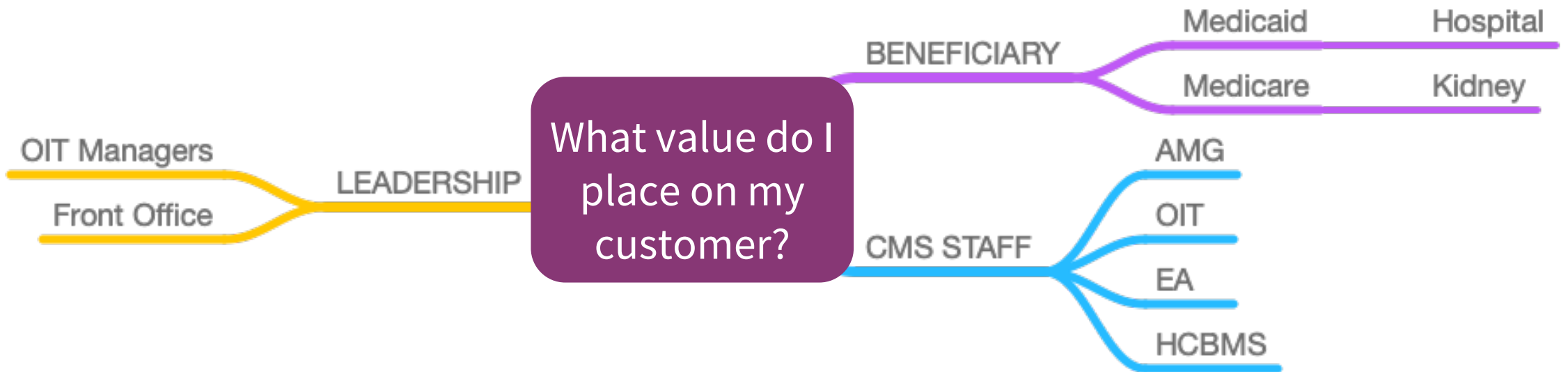


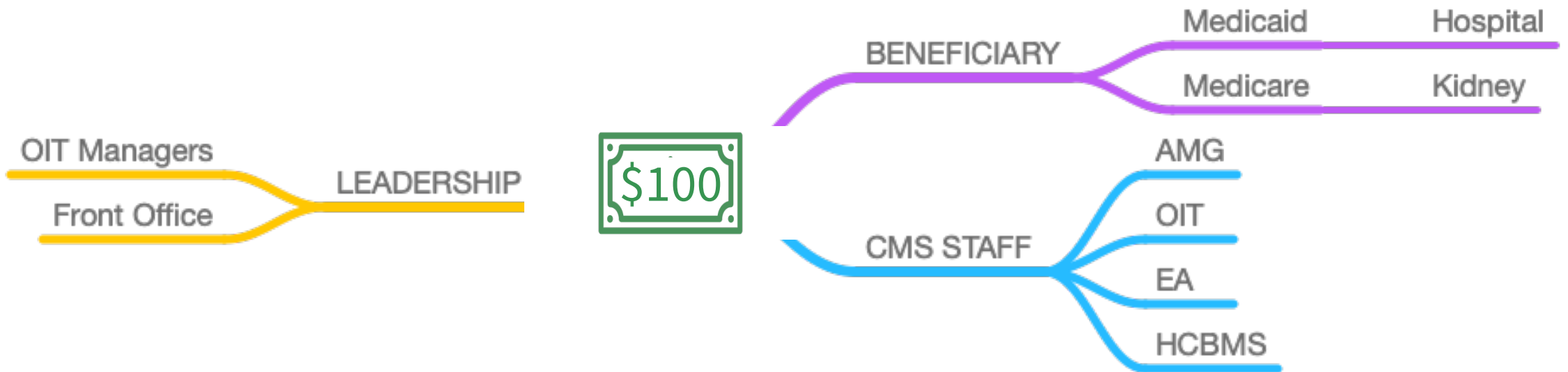
Kano Breakdown (Ideal)

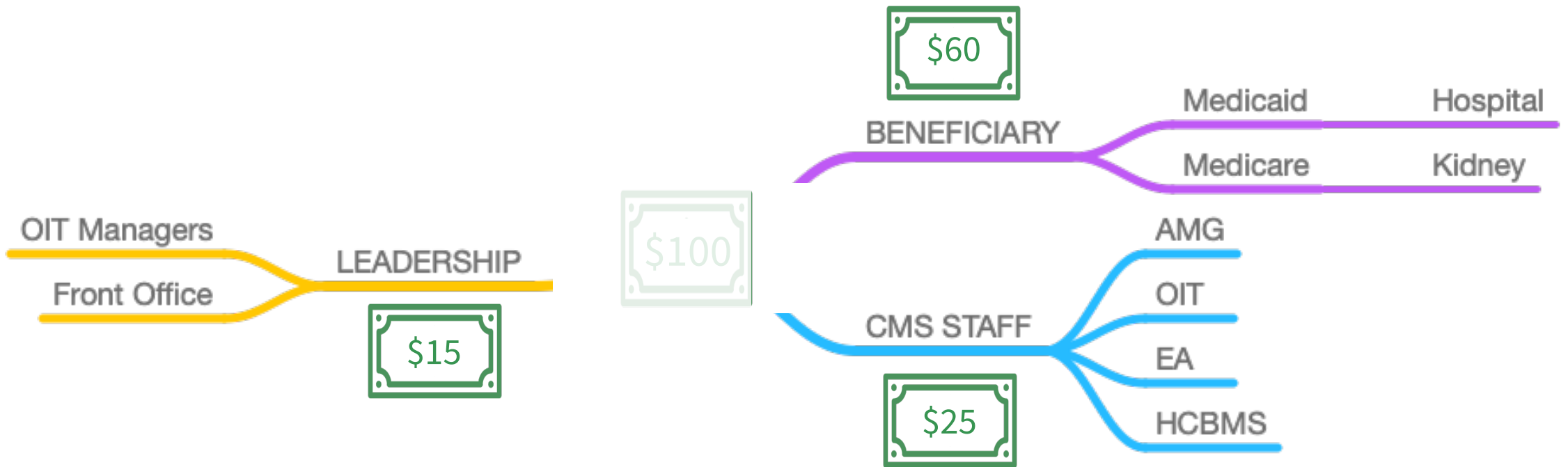




Backlog Grooming







Value x Impact
= Winning

Persona	Value	Impact	
--	0%	-1	Negative impact on persona
CMS Staff	25%	0	No impact on persona
Leadership	15%	1	Positive impact on persona
Beneficiary	60%	2	REALLY positive impact on persona

Example

Requirement	Type	Bene 60%	Staff 25%	Leader 15%	Score
Roast Beast	E	20	140	-10	150
Figgy Pudding	B	0	70	20	90
Pumpkin Pie	P	40	70	20	130
Cranberry Sauce	P	0	140	0	140

- 1 Negative impact on persona
- 0 No impact on persona
- 1 Positive impact on persona
- 2 REALLY positive impact on persona



Persona Perspective Taking



Summary + Wrap Up

Key Validations

Unexpected Delights

New Learnings

Potential Roadblocks

Key Validations

Unexpected Delights

New Learnings

Potential Roadblocks

Key Validations

Unexpected Delights

New Learnings

Potential Roadblocks

Key Validations

Unexpected Delights

New Learnings

Potential Roadblocks

THANK
YOU

THANK
YOU !

THANK
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THANK
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THANK
YOU

THANKS