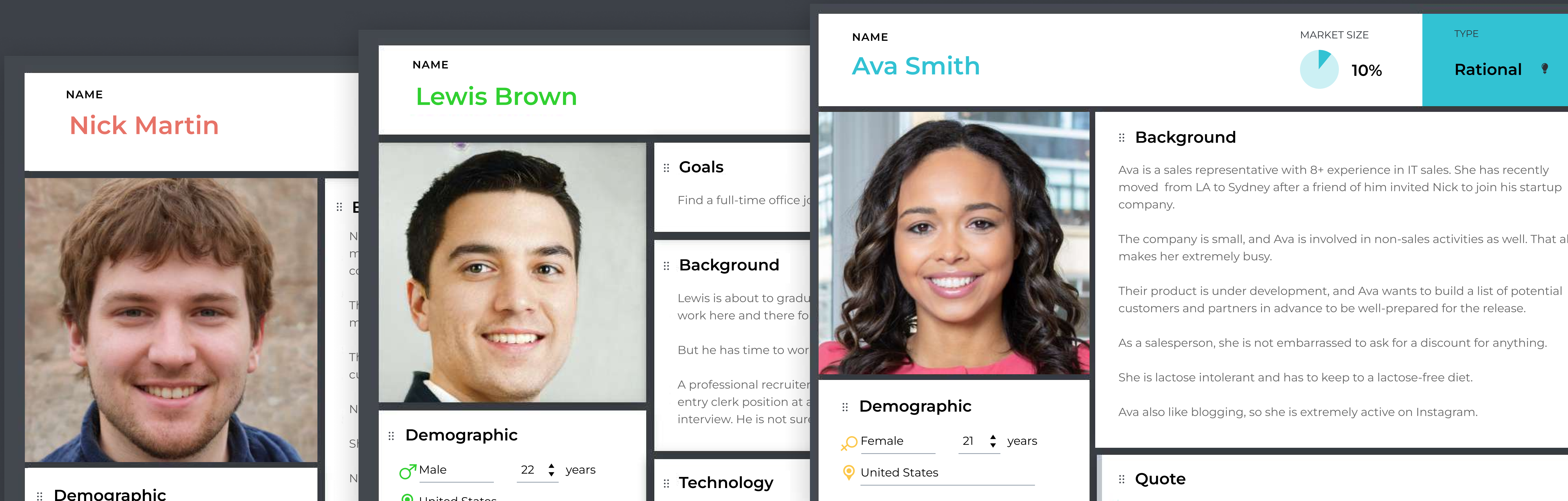
UXPRESSIA

Persona creation guide with UXPressia



CONTENTS

What's UXPressia?

UXPressia is an online collaborative platform for creating and sharing customer journey maps, customer personas, and impact maps.

In this short guide, you will learn how to get started with personas and create them in the UXPressia Persona tool.

HOW TO DEFINE PERSONAS

What are personas?

Personas are fictional characters that represent the different customer or user types that act in a similar way when using your product or service. There can be different criteria for grouping customers into personas, of which the most common are demographics and behavior.

- **Demographics-based grouping**

  Questions to start with:

  - Who are your customers?
  - What's their age and gender?
  - Where do they live?
  - How much do they earn?

- **Behavior-based grouping**

  Questions to start with:

  - What do your customers want?
  - Why are they doing particular things?
  - What motivates them?
  - What frustrates them?

HOW TO DEFINE PERSONAS

In some cases, like targeted advertising on social media, personas based on demographics work best. But having behavior-based personas is much more beneficial in most cases. Such personas offer you valuable insights into how to improve customer experience and your product or service in general.

Step 1: Conduct research

The first thing that needs to be done is learning from your customers or users. The goal is to gain a clear understanding of their goals, tasks, needs, and pains. And one of the best ways to get to know your customers or users is to interview them.

Each case is unique, but you can use the template at the end of this guide as a starting point when preparing for interviews.

The number of interviews you should carry out to gather the information you need can vary.

HOW TO DEFINE PERSONAS

The rule of thumb is to interview 5-30 people per role, and the tasks that these people perform define each of the roles. Having interviewed 5 people, you'll start detecting trends. At some point, you'll notice that interviews bring very little or no new insights — that's the sign that you don't need any more research.

If, for some reason, you cannot interview your users or customers, you can interview people from your company who directly interact with them, such as sales representatives, customer support agents, customer success managers, etc.

QUICK TIP:

Organize an empathy mapping workshop with them to get answers to all your questions.

Step 2: Identify behavioral attributes

Now it’s time to analyze the research data you have. Identify behavioral attributes common to people with the same role (e.g., marketers). The attributes should describe what affects a person’s behavior in situations when the person:

- Is trying to complete some tasks
- Is achieving goals
- Is solving problems
- Is interacting with your product

Example: personal finance management experience

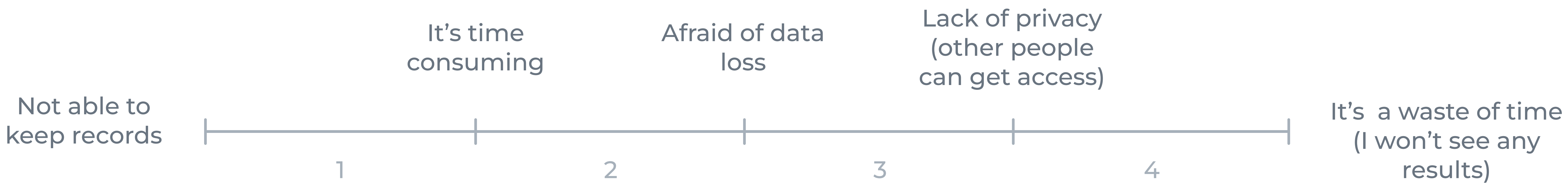
Attributes:

- What's the reason for managing personal finance?
- How frequently does the person manage personal finance?
- What tools does the person use for managing personal finance?
- Where does the person store information about spending/income (context)?
- Who is in charge of managing personal finance?
- What keeps the person from managing personal finance? I.e., what are the fears?

Step 3: Create behavioral scales

Once you write down all the behavioral attributes, define all the possible values for each attribute. Most of the observed behaviors can be represented as a scale, discrete, and with values that each attribute can take. Here is an example of such a scale:

What keeps the person from managing personal finance?



Typically, you will end up with 5-20 scales, each of which will have at least three values. If you are stuck, consider using some of the scales that come next.

Person profile

Experience

- Current experience: how does the person solve problems/achieve goals now?
- Previous experience: how did the person solve problems/achieve goals in the past?
- Experience with your product/service
- Experience with your competitors
- Experience with your domain

Example:

Personal finance management experience

- Doesn’t manage personal finance
- Tried to manage personal finance previously
- Manages personal finance from time to time
- Constantly manages personal finance

Person profile

Human factors

- Age
- Geography
- Education
- Physiology
- Etc.

Example:

Restrictions on interacting with a device

- Fine motor difficulties
- Vision problems
- Severe restrictions (able to use only one hand)

Person profile

Problems, barriers, frustrations

- What problems does the person want to solve?
- What does the person try to avoid?
- What is the person afraid of?
- What keeps the person from achieving goals?
- What difficulties does the person face when accomplishing tasks/achieving goals?

Example:

What keeps the person from managing personal finance?

- Not able to keep records
- It's time-consuming
- Afraid of data loss
- Lack of privacy (other people can get access)
- It’s a waste of time (I won’t see any results)

Person profile

Needs, goals, expectations

- What does the person want to achieve?
- Why does the person perform a specific action?
- What does the person expect from the interaction, your product, content, etc.?
- What needs does the person want to satisfy?

Example:

What's the reason for managing personal finance?

- Tracking financial flows
- Reducing costs
- Saving up for something
- Tracking expenses
- Planning a personal budget

Person profile

Knowledge

- Domain knowledge
- Your product knowledge
- Knowledge of technology and current trends
- Professional knowledge

Example:

What does the person know about managing personal finance?

- Knows nothing (e.g., uses a pen to do calculations)
- Knows little (e.g., does calculations in Excel)
- Knows about specialized services
- Takes advantage of one or more services

Behavior profile

Tasks

- What does the person do? What tasks does the person perform?
- What are the typical scenarios?
- How frequent are these scenarios? What's their importance?
- What are the relationships between these tasks?

Example:

How often does the person manage personal finance?

- Doesn’t manage at all
- Occasionally
- On the same day
- Immediately after purchase
- Regularly

Behavior profile

Triggers

- What prompts the person to start performing a task?
- What prompts the person to switch between tasks?
- What prompts the person to pause or stop?
- What are the interruptions when performing a task?

Example:

What prompted the person to start managing personal finance?

- Unexpectedly ran out of money
- Decided to start saving for a big purchase
- Had no spending money for some time
- Understand whether he/she will be able to start paying for a gym
- External factors (e.g., friends).
- Curiosity

Behavior profile

Execution time

- How much time does the person spend on the task?
- How does the lack/availability of time influence the behavior?
- Expectations of time spent on the task execution
- What determines the execution time?

Example:

What does the person do if he/she cannot write down income and expenses on time?

- Saves the bill/takes a screenshot and writes down everything within the shortest possible time
- Saves the bill/takes a screenshot and writes down everything later
- Tries to remember the figures from the bill and write down everything later
- Forgets/does nothing
- Sets notifications to get back to this task later

Context profile

Environment

- When does the interaction take place?
- Where exactly does the interaction take place?
- What channels are used?
- How does the person impact the context?
- Restrictions and opportunities of the context for the person

Example:

What tools does the person use to manage personal finance?

- No tools. Tries to remember all income and expenses
- Saves bills and account statements
- Writes notes in a notebook
- Uses non-specialized software like Excel and Google Sheets
- Uses specialized software

Context profile

Relationships with other participants

- Who else is involved in the process?
- What's their role in the process?
- Who is a decision-maker?
- What influence do others have on this person?
- What influence does this person have on others?
- Restrictions and opportunities within the process

Example:

Who is in charge of managing the person's personal finance?

- The person themselves
- Someone assists the person
- Someone else (not the person)

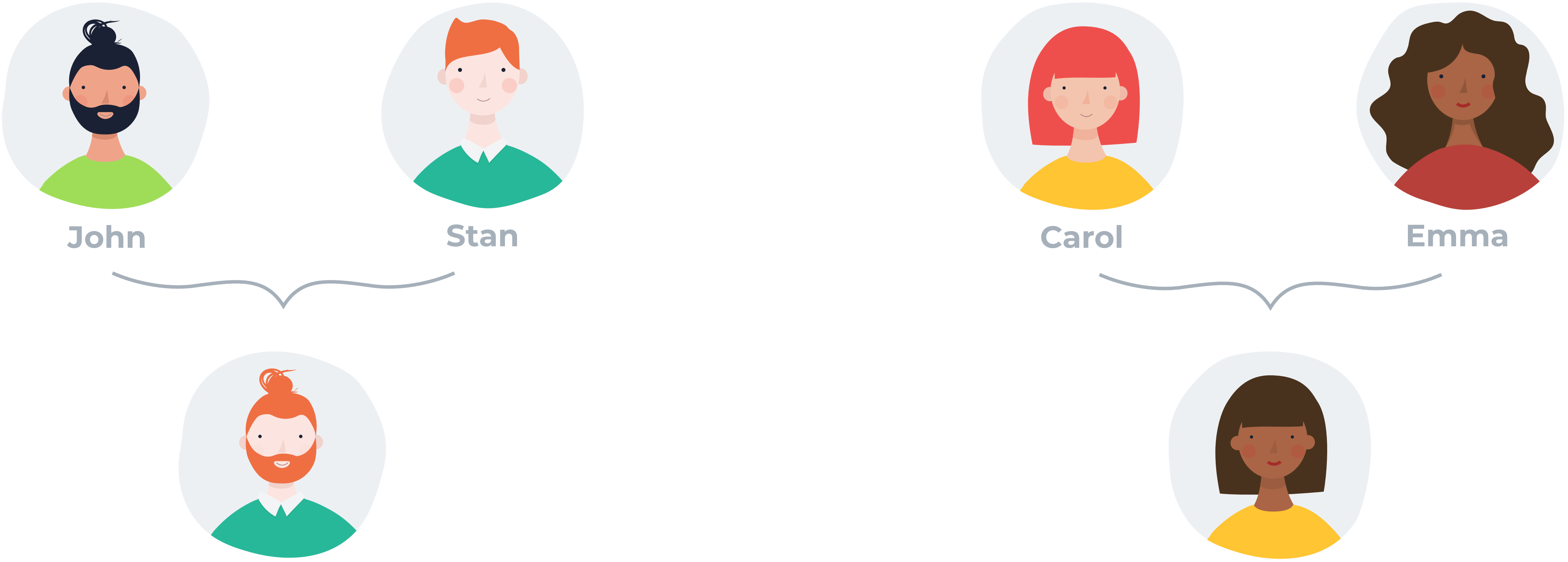
Step 4: Put all research participants on each scale

Note that all the data is **relative**. So it's essential to compare participants and their behavior. Put every participant on the scales to identify patterns.

	1	2	3	4	5	
Doesn't manage personal finance	Steve, Alice	Bill	John, Stan	Kate	Carol, Emma	Constantly manages personal finance
Tracks financial flows	John, Carol	Alice	Emma, Bill	Steve	Kate, Stan	Plans a personal budget
Knows nothing about managing personal finance	Kate, Bill	Carol	Alice, Steve	John, Stan	Emma	Takes advantage of one or more peronal finance management services
Doesn't use any tools	Steve, Stan	John	Carol, Emma	Kate, Alice	Bill	Uses specialized software
Manages personal finance by themselves	Bill	Alice	John, Stan	Emma, Kate	Steve	Someone else manages their personal finance

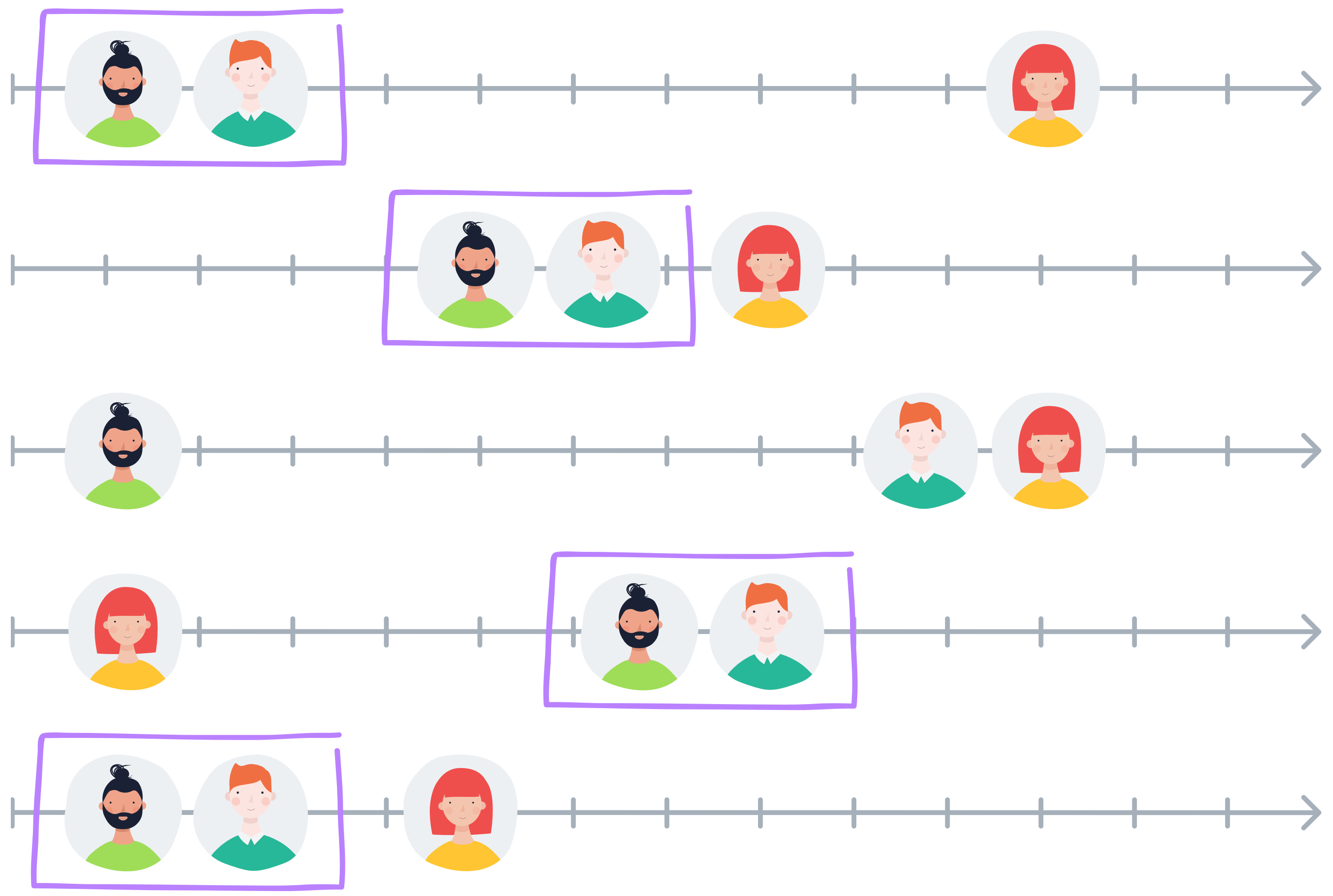
HOW TO DEFINE PERSONAS

Looking at the scales, you'll notice that two participants (John and Stan) appear in the same position three times, once near each other, and once in different positions. That signals that John and Stan tend to be similar people, and you should use one persona to represent them. Other participants might also be in similar positions (e.g., see Carol and Emma), but their placement is different from the one of John and Stan. Use different personas to represent them.



Step 5: Identify patterns

The same people who appear on the same or similar places on 5-9 scales constitute a pattern, laying a foundation for a to-be-formed persona. Make sure that every pattern you identify is logical and explainable.



Note: every unique behavioral/attitudinal pattern you identify among research participants must serve as a source for a persona

BUILDING PERSONAS IN UXPRESSIA

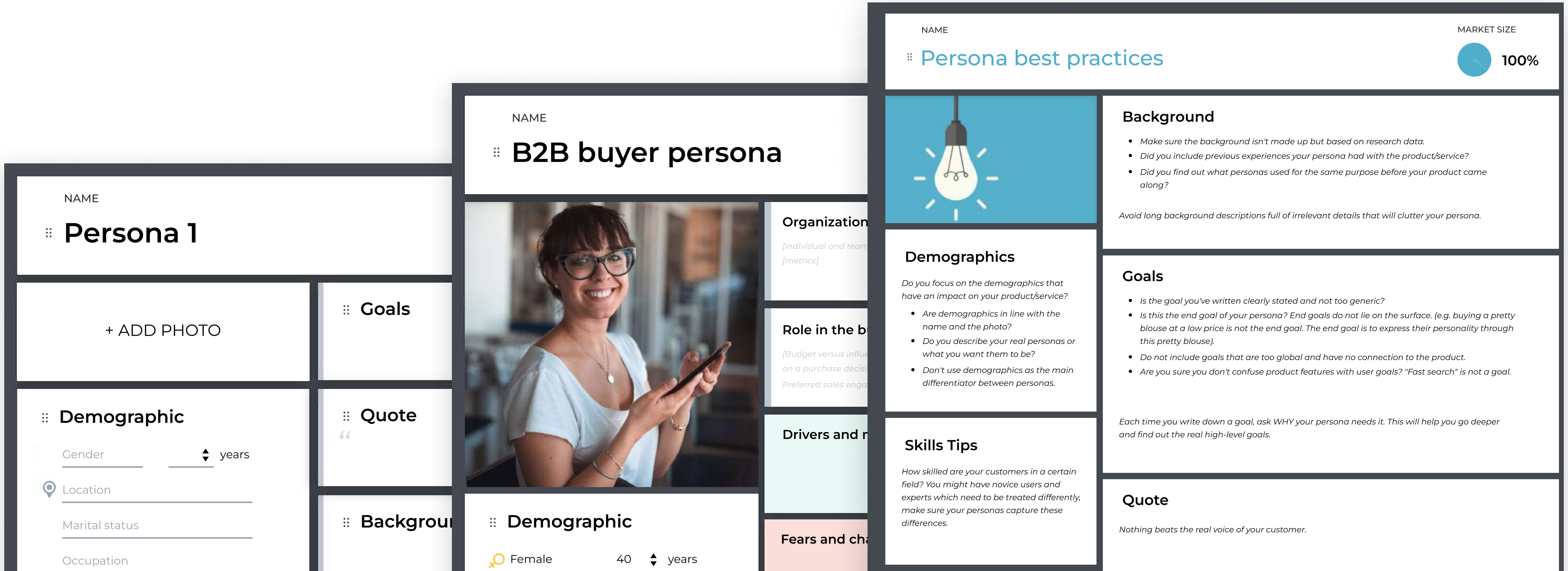
BUILDING PERSONAS IN UXPRESSIA

Having categorized your customers into groups, go ahead with creating personas. Start with defining sections to place all the information that accurately describes each group.

Step 1: Define the layout

It’s the persona’s type and purpose that together determine the choice of sections for each persona.

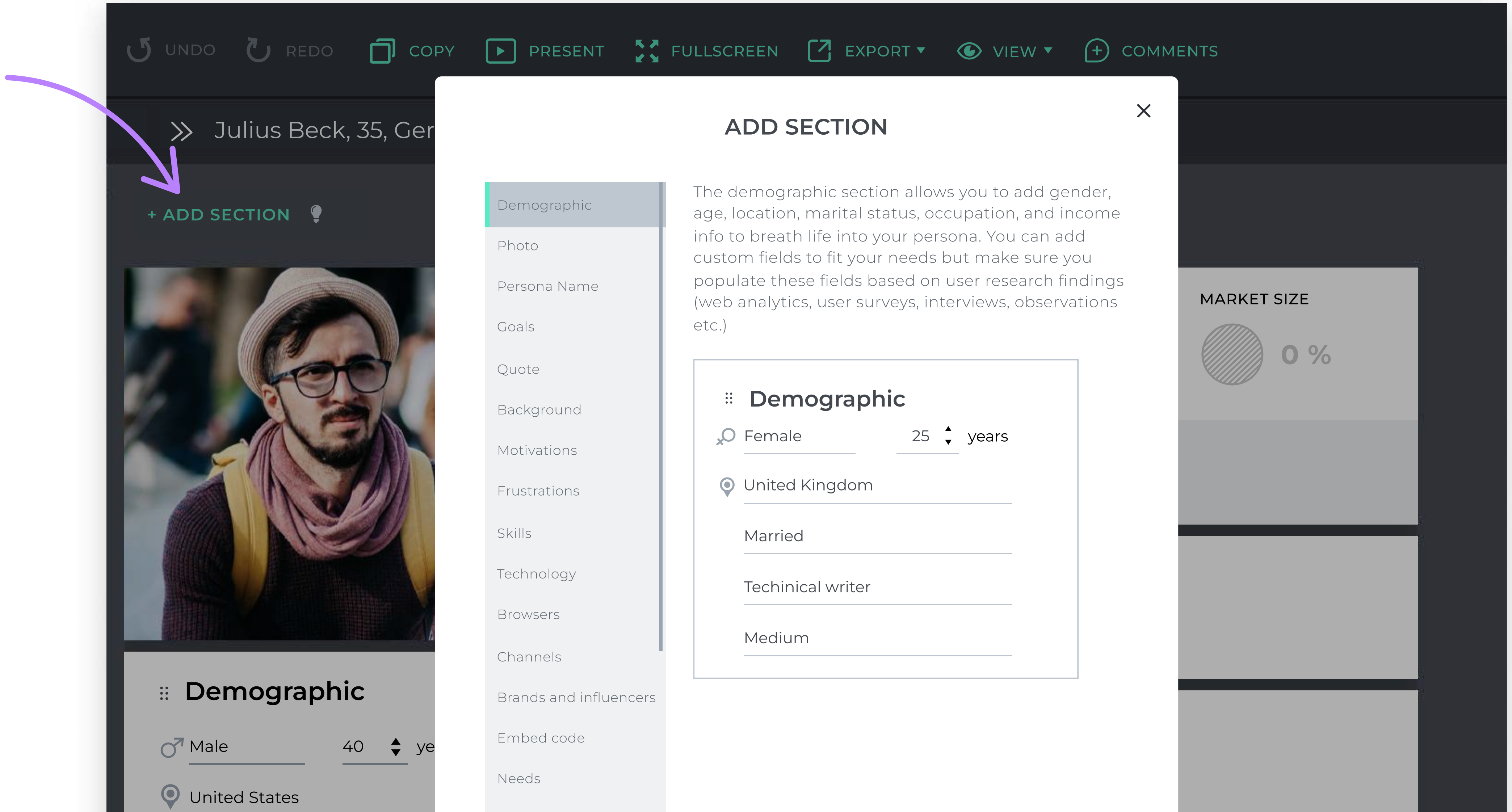
Choose the sections you need from UXPressia’s ready-to-use set of sections or take advantage of our pre-filled templates (e.g., a buyer persona template).



BUILDING PERSONAS IN UXPRESSIA

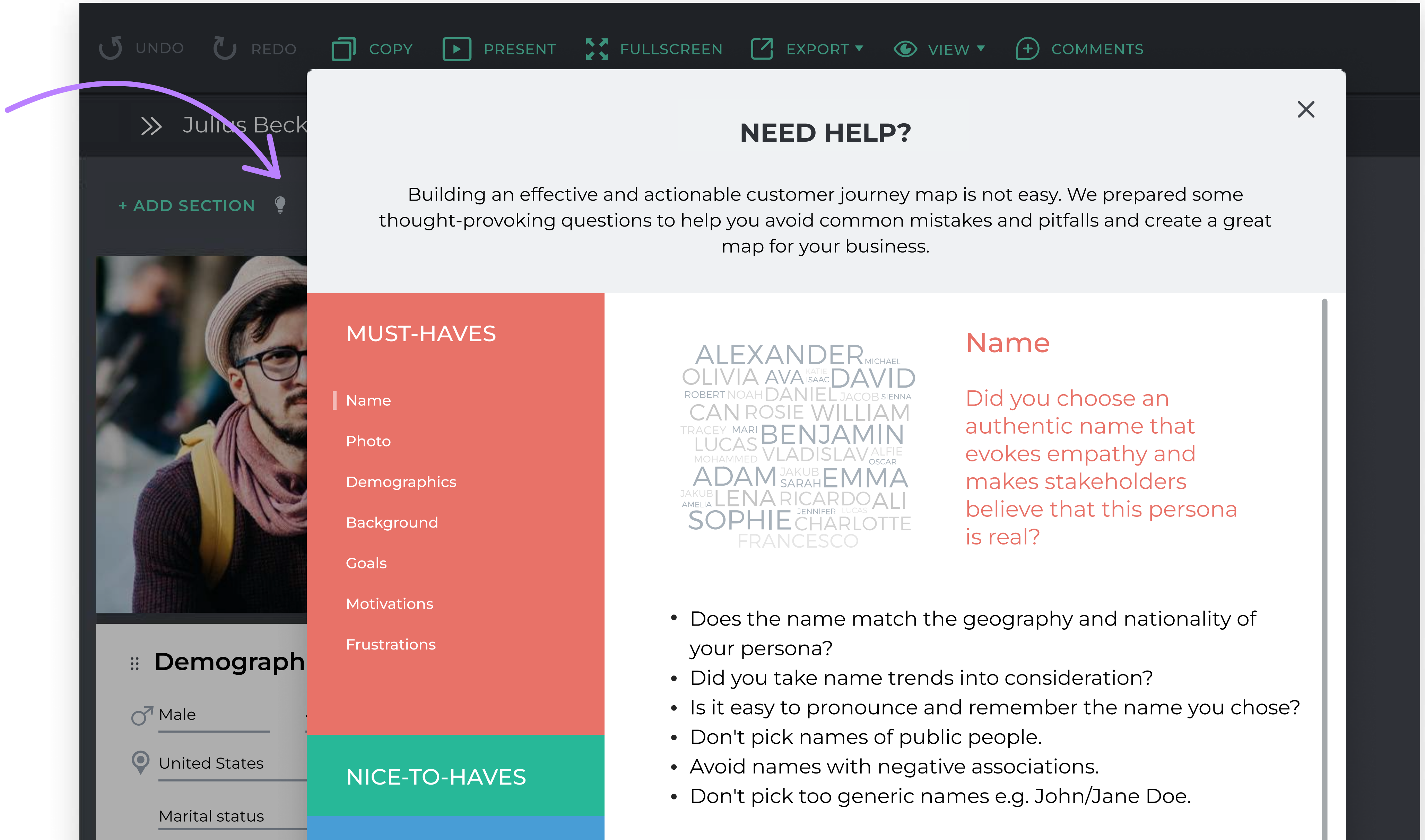
You can see all the sections available within our tool by hitting the + ADD SECTION button in the upper left corner of the persona editor.

The list of all available sections with examples will show in the pop-up window.



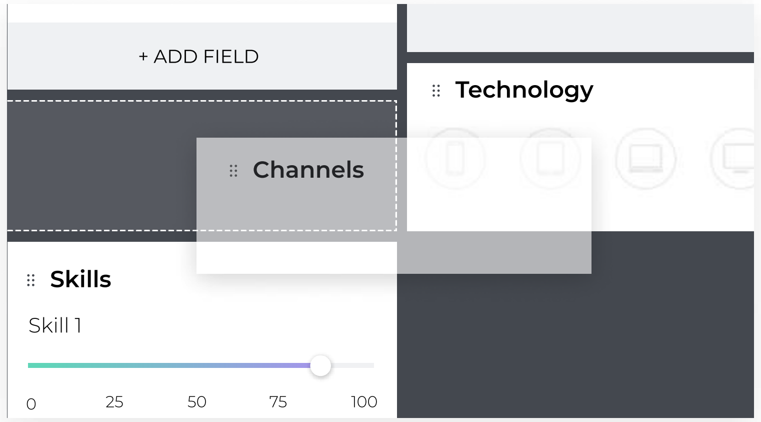
BUILDING PERSONAS IN UXPRESSIA

If you are still unsure which sections to add to your persona, check out our tips, which open up once you click on the bulb icon.

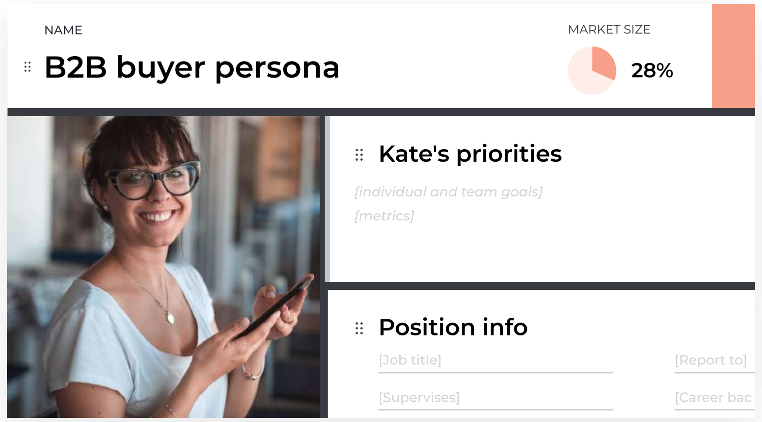


BUILDING PERSONAS IN UXPRESSIA

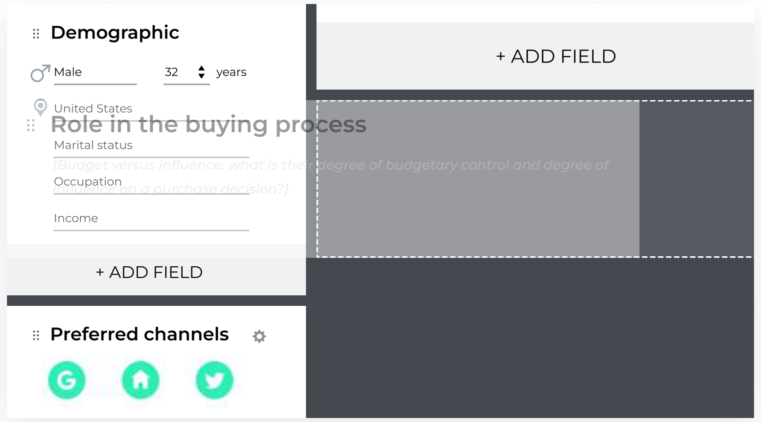
You can customize the layout of your persona different ways :



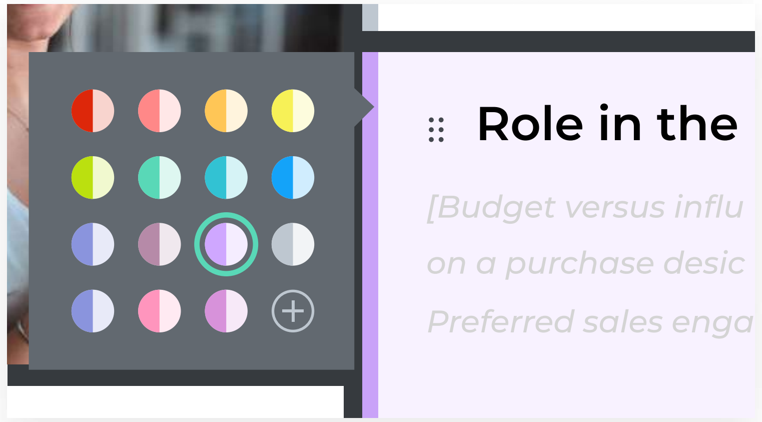
Reorder sections by dragging and dropping them



Edit section titles



Change columns' width to fit the content

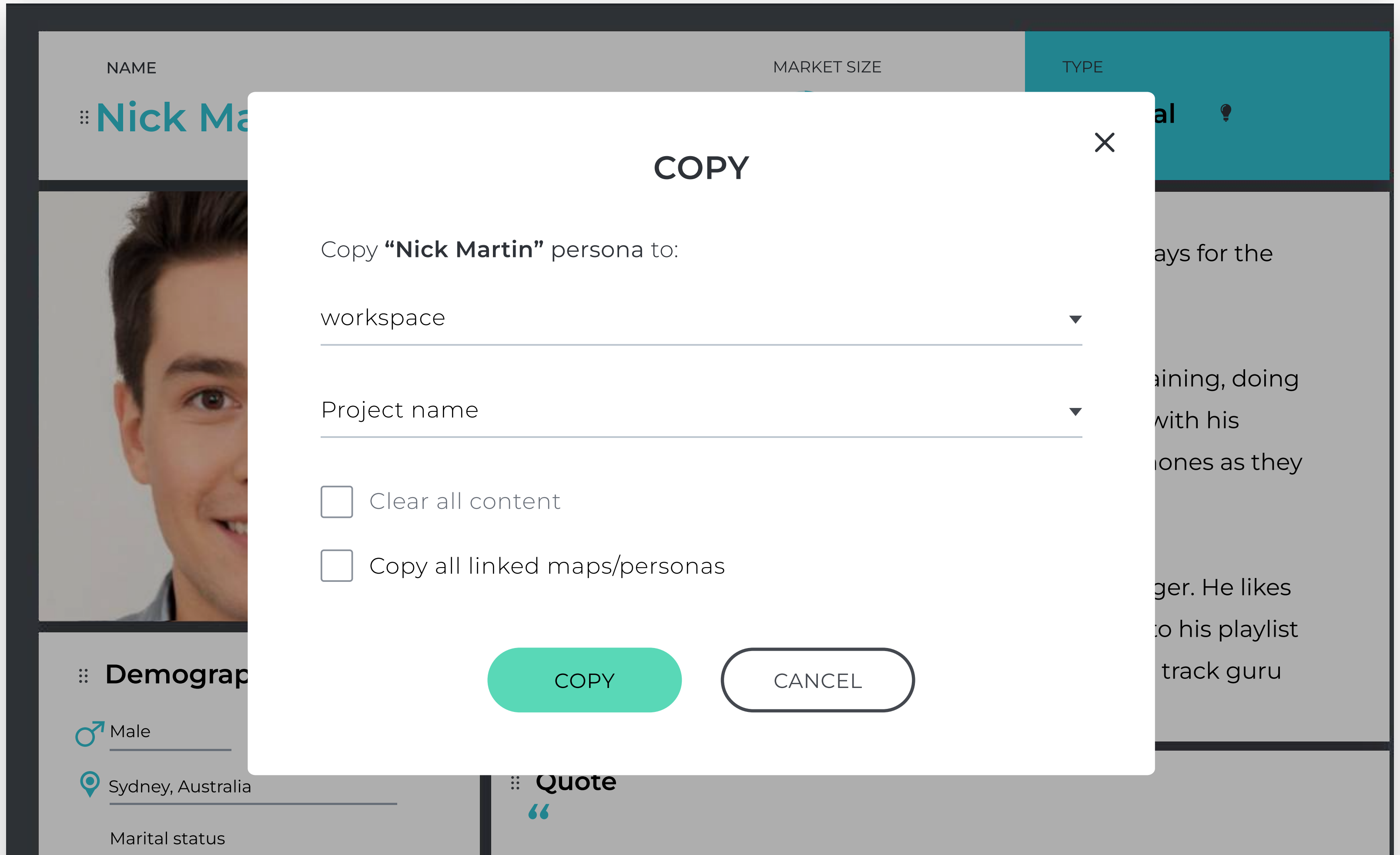


Change the color of tiles. Open the palette by hitting the tiny stripe located on the left of the tile

Learn more about how you can customize persona on our Help Center.

Step 2: Turn your first persona into a template

Consistency is vital in any project, and it’s reasonable to keep to the same persona structure from the very beginning. Work with your team to develop a persona structure that everyone is happy with, and make a copy of this persona so that you’ll be able to use it as a template for all future personas.

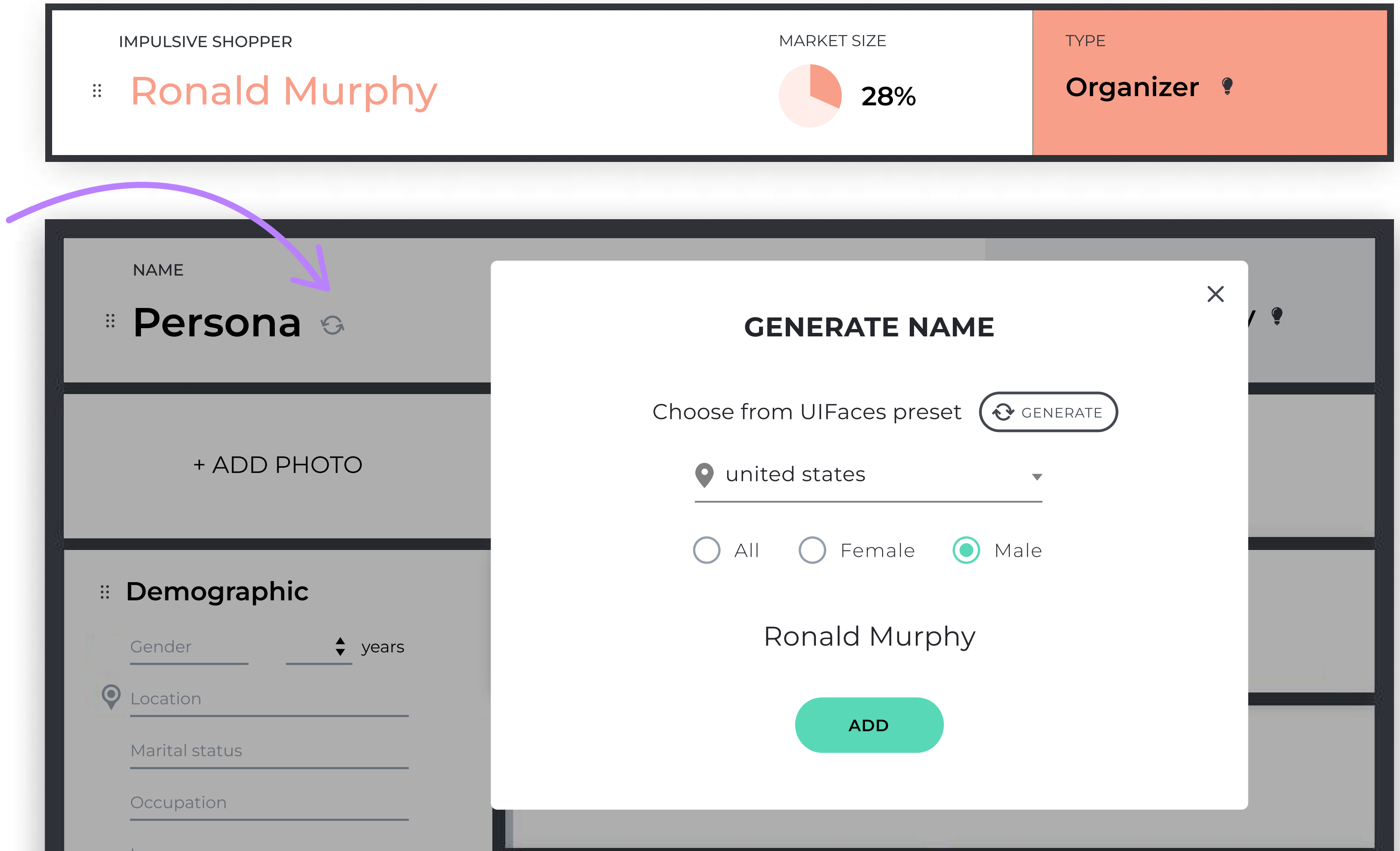


QUICK TIP:

Create a project titled “Templates” to store all of your templates in it

Step 3: Name your persona

To quickly locate your persona, give it a meaningful name. In most cases, you can go either with a fictional First Name + Last Name (e.g., Ronald Murphy) or with a short name for the group (e.g., Impulsive shopper). The first option helps to develop empathy, while the other option gives you insight into personality traits. And, of course, you can have both:

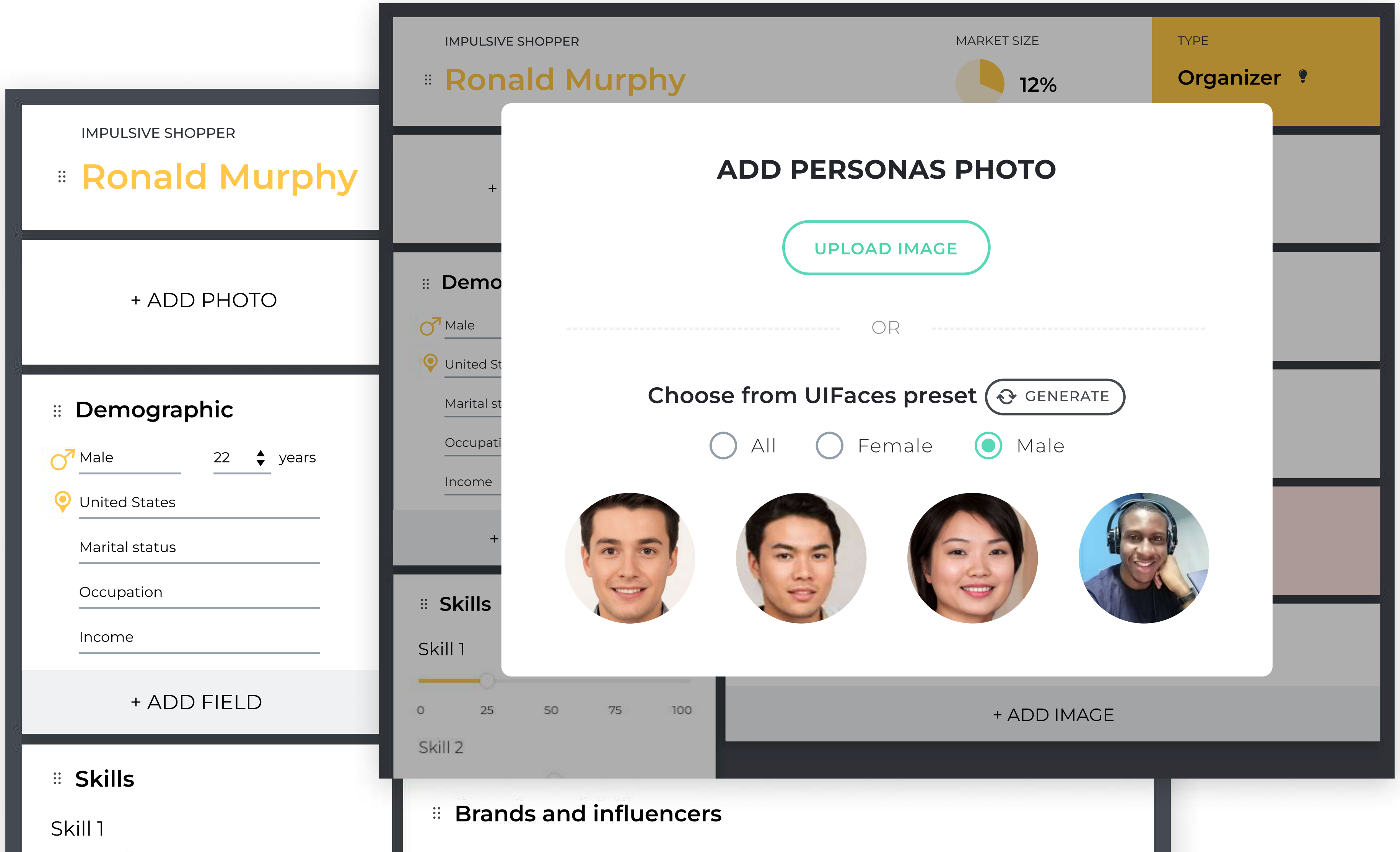


QUICK TIP:

Use UXPressia's name generator to create a name for your persona

Step 4: Add a photo

Another thing that helps to empathize with customers/users is adding a persona's photo to the profile. To add a photo to your persona, use UXPressia's photo generator or any other photo you wish to use.



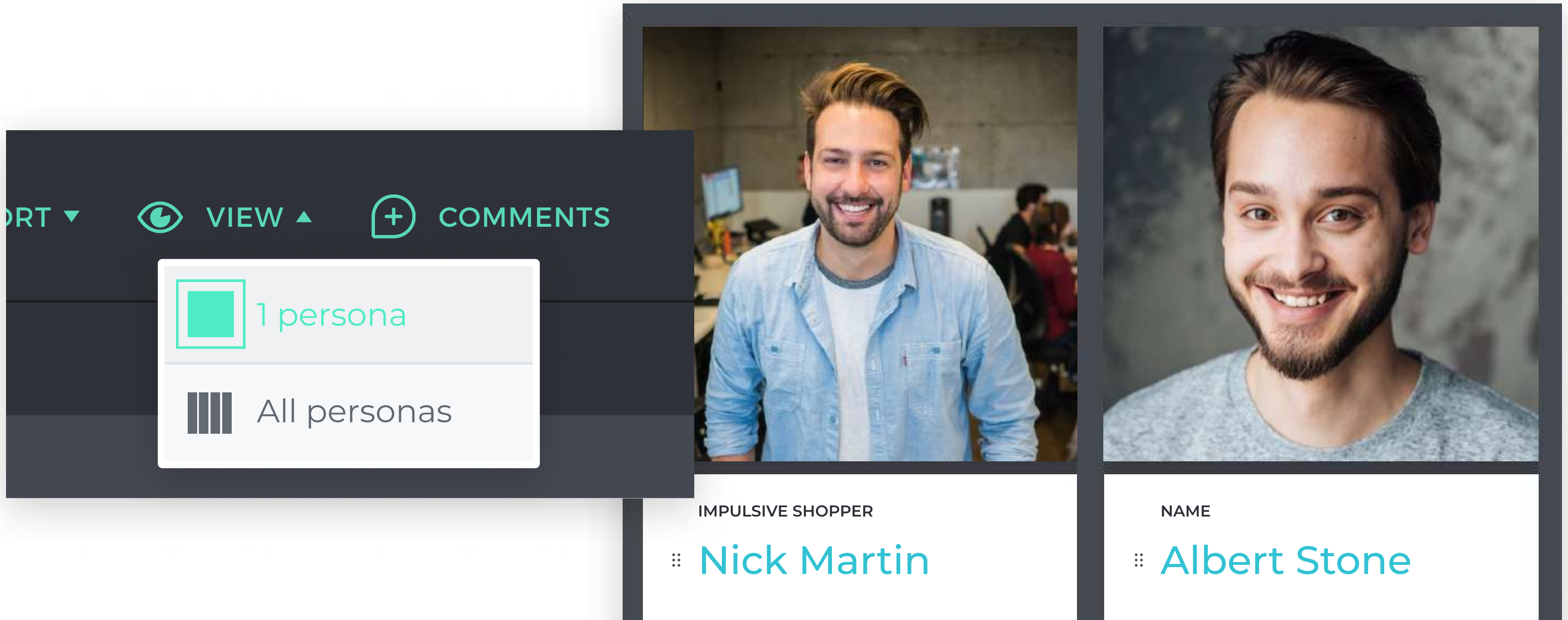
QUICK TIP:

When picking a photo, avoid using staged shots or photos of famous people and team members

Step 5: Start with a quick draft

It's always a good idea to begin with:

- Persona's goals as they drive persona's behavior and explain why they act in a certain way. Plus, they shed some light on their expectations.
- Motivations: What drives the persona (concerning your product/service)?
- Frustrations: What makes them unhappy/angry? Or what makes their tasks more challenging?



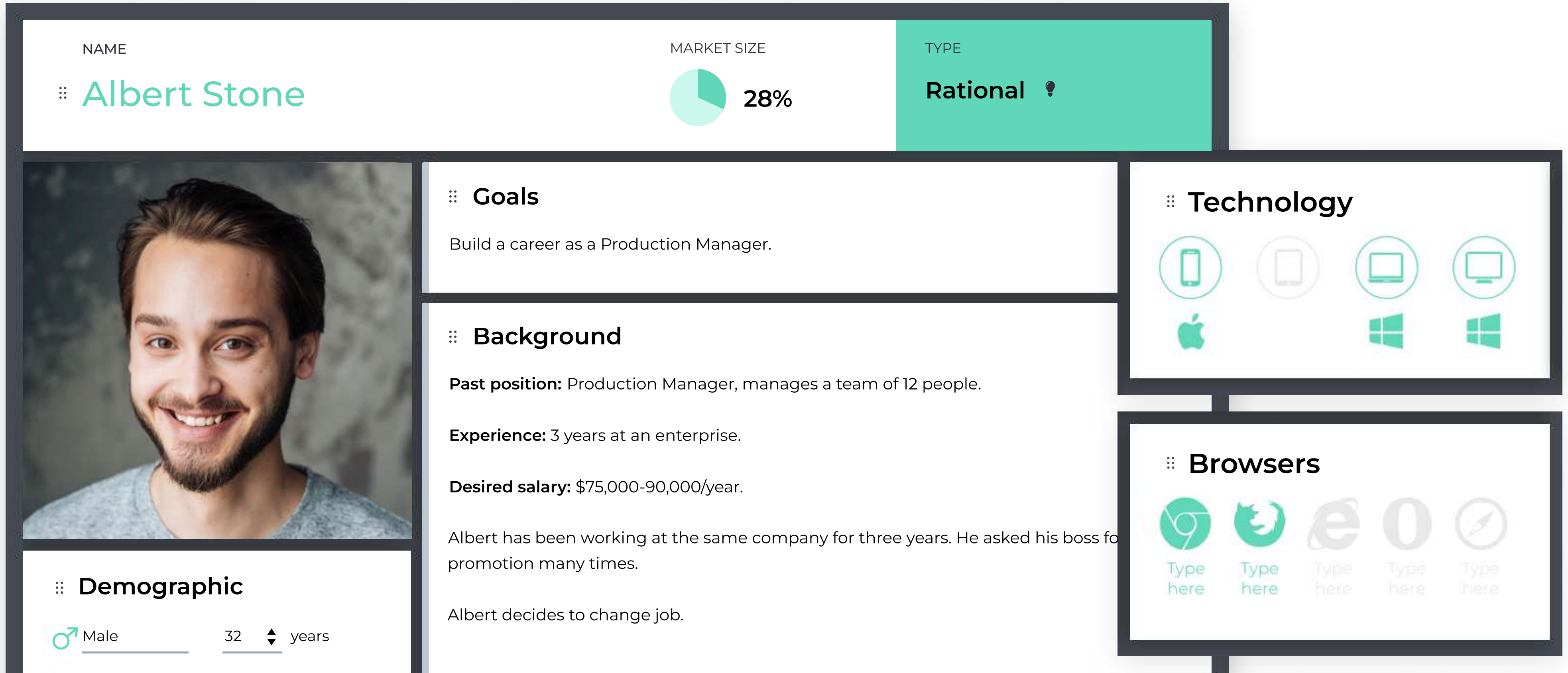
QUICK TIP:

Switch to the [Multipersona view] from time to time and compare the same sections for different personas. That might give you some more insights and help to underline the difference between them.

Step 6: Gather more data

Once you write down everything off the top of your head, it's time to go deeper.

Add actual customer quotes that you heard during the interview, upload images that demonstrate personas' working environment (or examples of the content they create). Then leverage marketing data to estimate the market size and add it to the profile and use web analytics to add technology/browser details.



PRESENTING PERSONAS

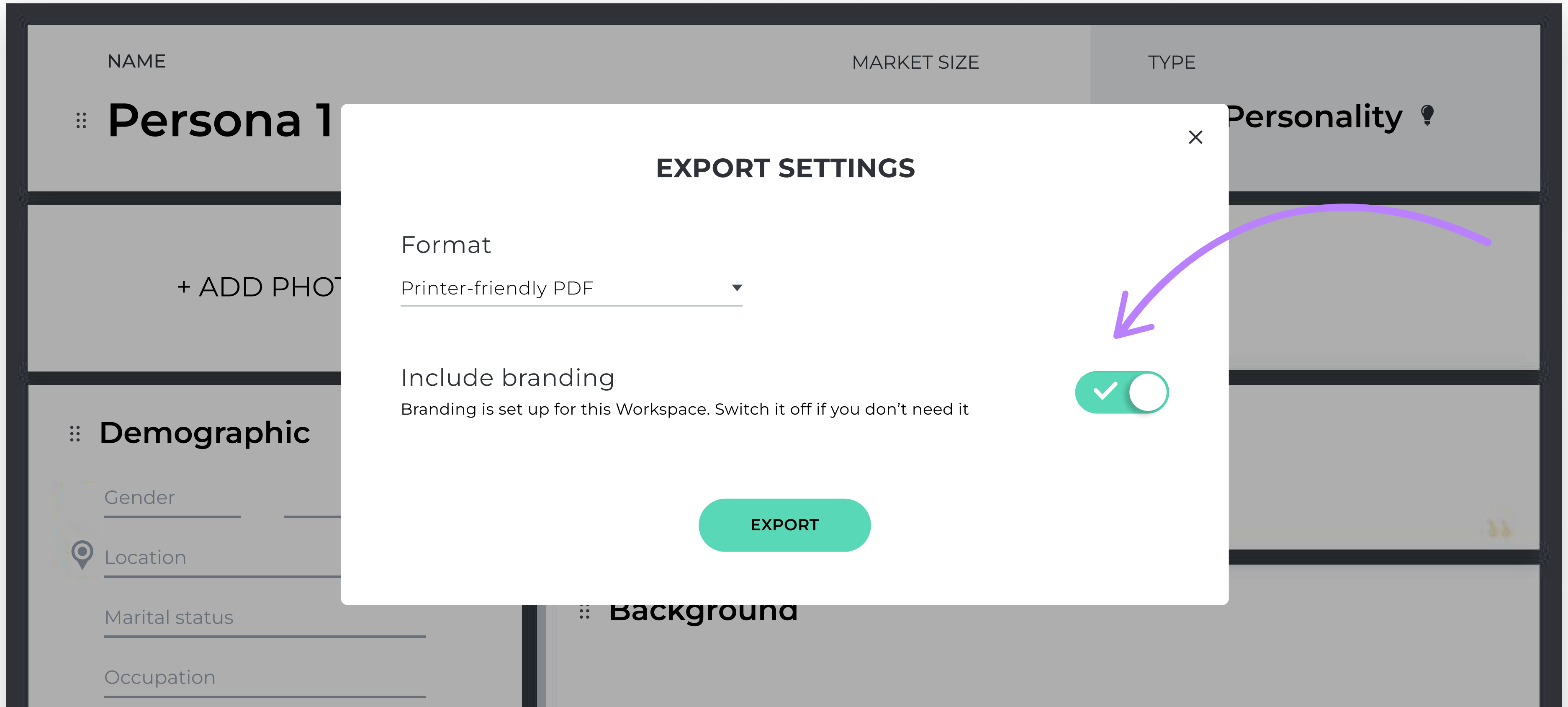
PRESENTING PERSONAS

Once the personas are ready, you can present them to your team or client. In this section, you will find some tips on how to prepare your personas for a presentation.

Tip 1: Polish your personas

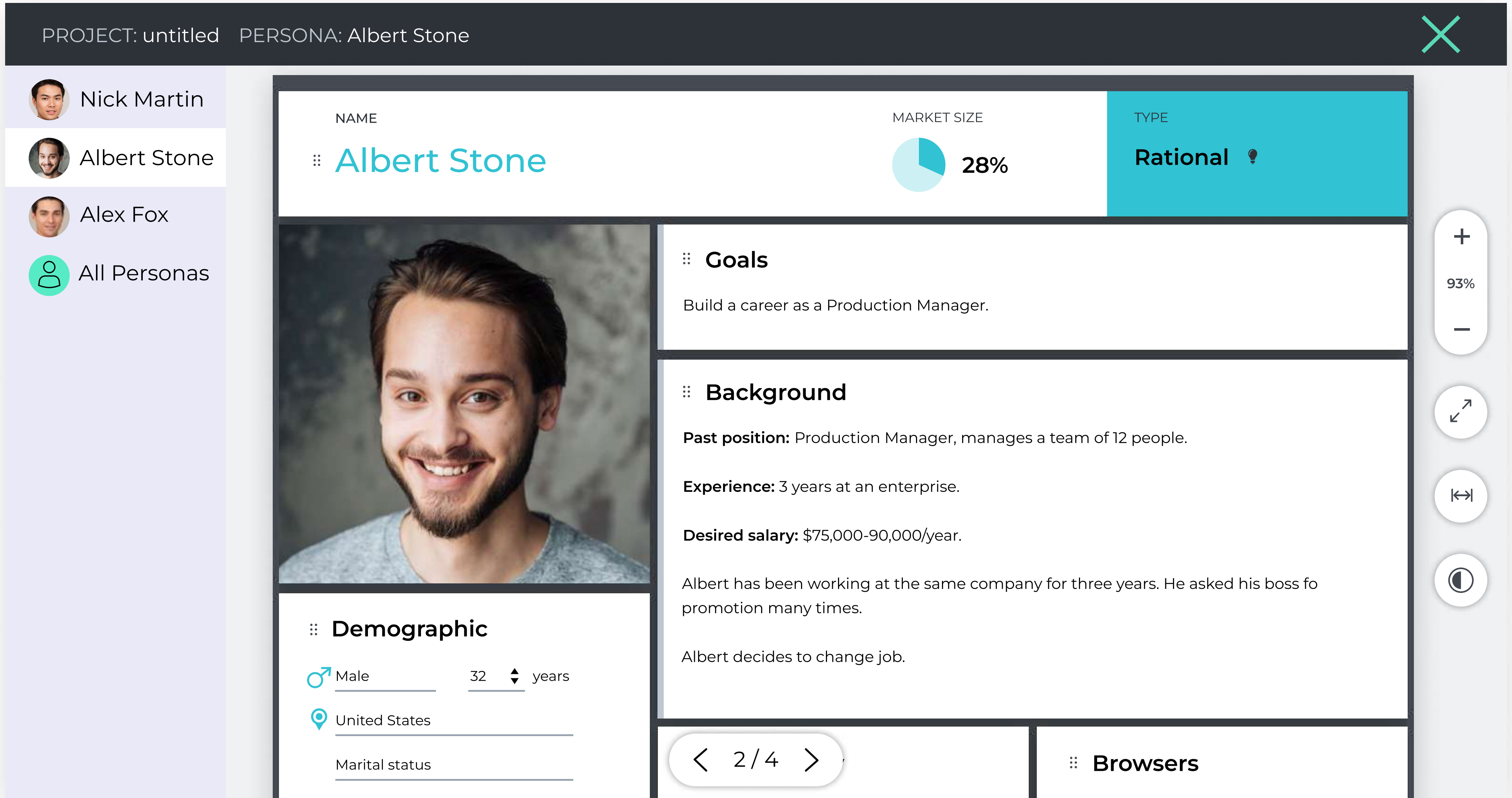
Make personas visually appealing before taking them to a meeting. Add some style to your text and set color accents to make an impact on the audience.

Feel free to add some brand flavor to your personas. With UXPressia, you can brand your exports by putting your logo on the top of your persona or map and setting a custom color for the branding stripe behind the logo.



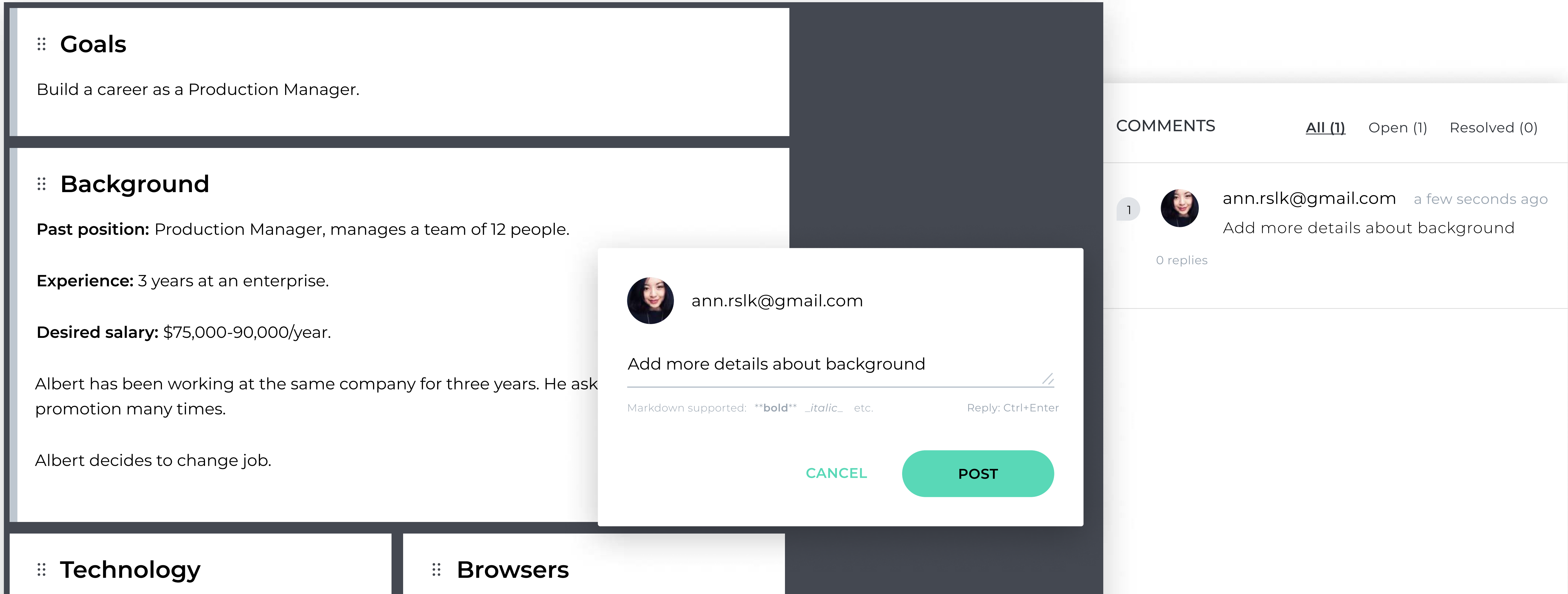
Tip 2: Present in person or online

Whether you present your persona in person or online using screen sharing, take advantage of the presentation mode to have quick view access to all personas within your project folder, zoom them in and out, and go fullscreen if needed.



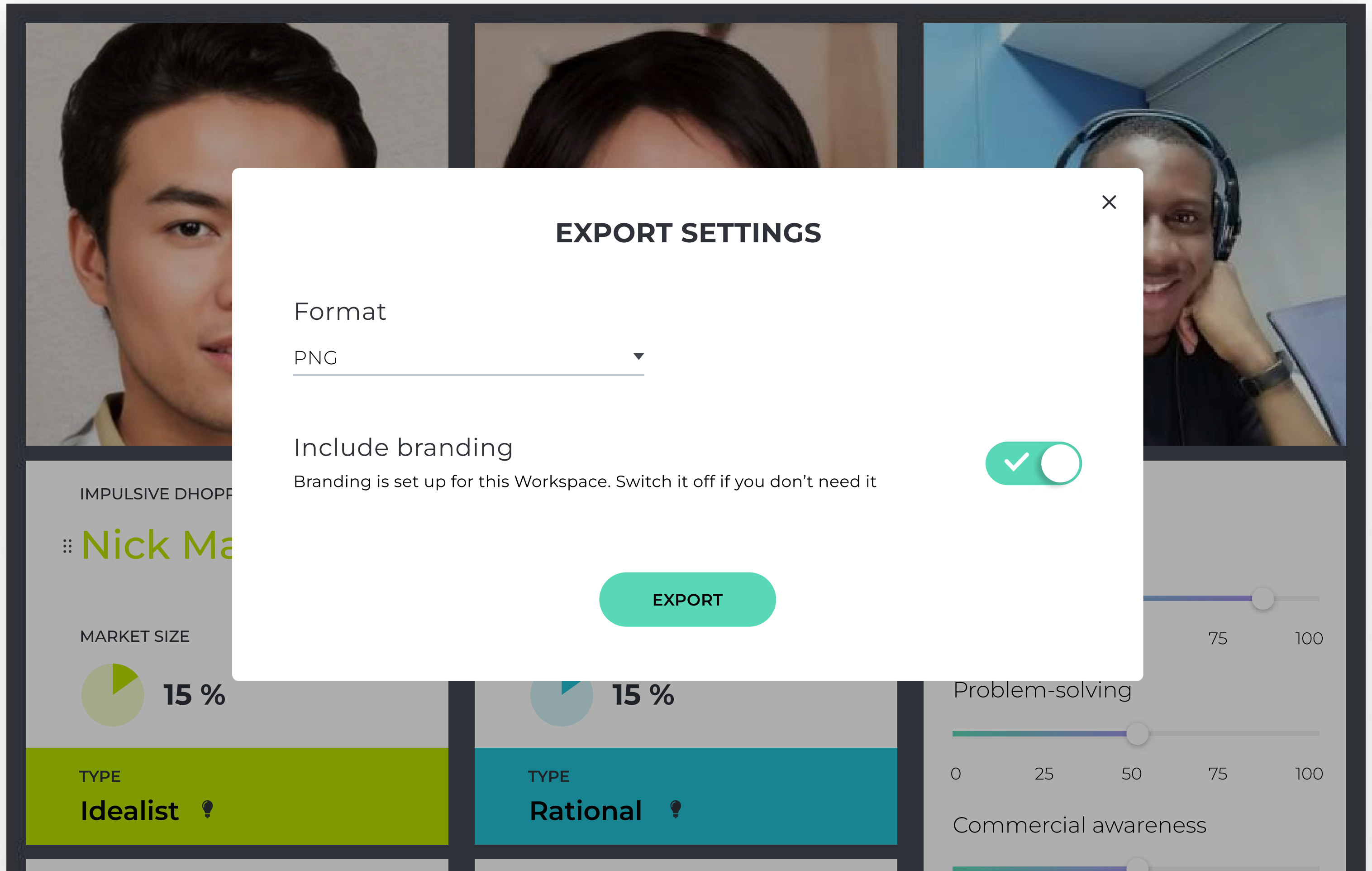
PRESENTING PERSONAS

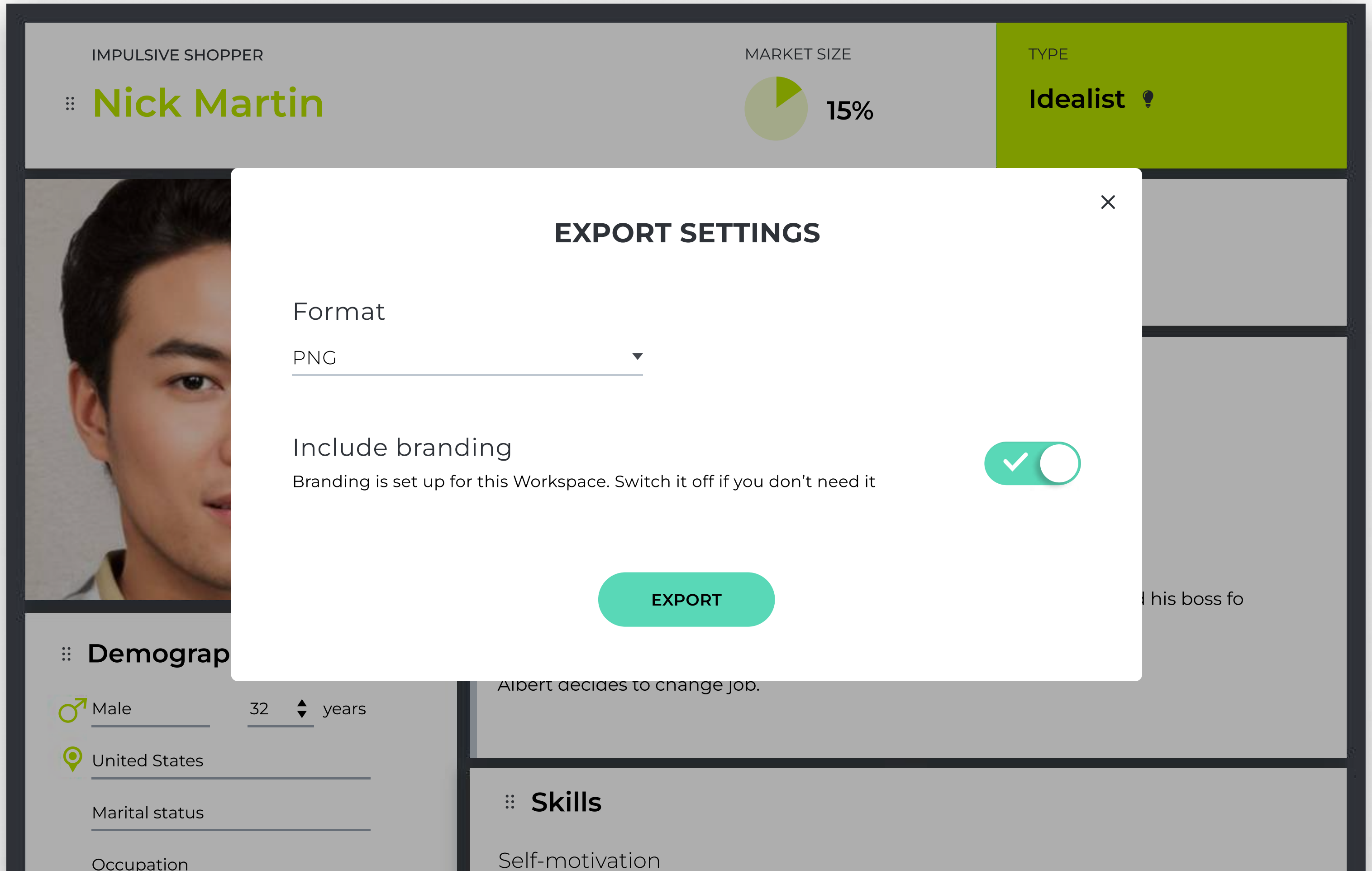
Presenting your persona in the editing mode might be a good idea, too, if you want to capture feedback from the team on the go. You can leave quick notes within the textboxes using the commenting mode, or switch between personas as you present.



Tip 3: Export personas

Demonstrating personas online is not the only way to present your insights. You can also export your persona to a PNG or vector-based PDF file. Once the file renders in a new tab, you'll be able to save it to your computer and then send the file to your team or client as a file. We recommend having each persona separately and a single sheet with all personas overview.





Tip 4: Print your personas

[Printing your personas]() and hanging them in your office can help you keep the entire team on the same page. This will also help you collect feedback as people in the company will be able to put sticky notes with their ideas on printed personas.

To print a persona, it's best to use a printer-friendly PDF version. As it's fully vector-based, the persona will scale to any size without losing the quality.

KEEPING PERSONAS ALIVE

Personas will have value only if you keep them updated and make a part of your workflow. Otherwise, your personas won’t bring about lasting quality changes. Here’s how you can use UXPressia to create personas that won’t end up on the shelves:

Engage the teams

Customer-centric transformation can only be achieved when you engage the entire company in the process and make sure that people across all the departments know what their customers look like. We built our platform to help you collaborate with the team and share your insights across organizational silos. Here are some of the features that UXPressia offers:

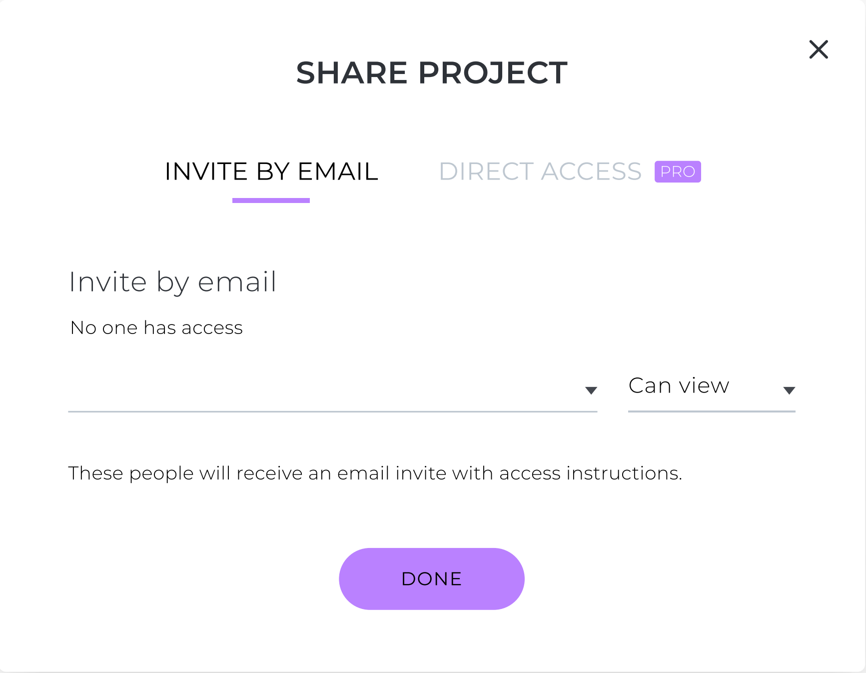
- **Real-time collaboration**

  In UXPressia, you can collaborate in real-time with an unlimited number of users on the same document. Each collaborator will see every change in the document once it's made. You can use this feature to run fully digital workshops and brainstorm sessions. Your team can be thousands of miles away while still being in the same virtual room with your digital "sticky notes".

KEEPING PERSONAS ALIVE

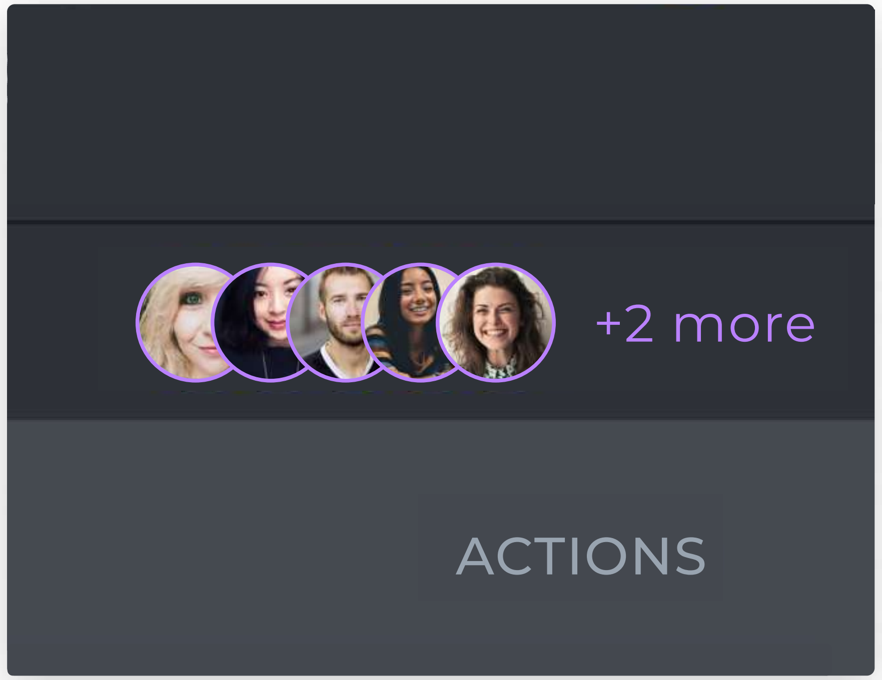
- **Project sharing**

  You can invite your teammates to your projects via email or a direct link. The latter will let you share projects with those who don't have an account at UXPressia. It's perfect for those cases when you need to quickly share your work with someone who needs one-time access to view your persona or make edits in it.



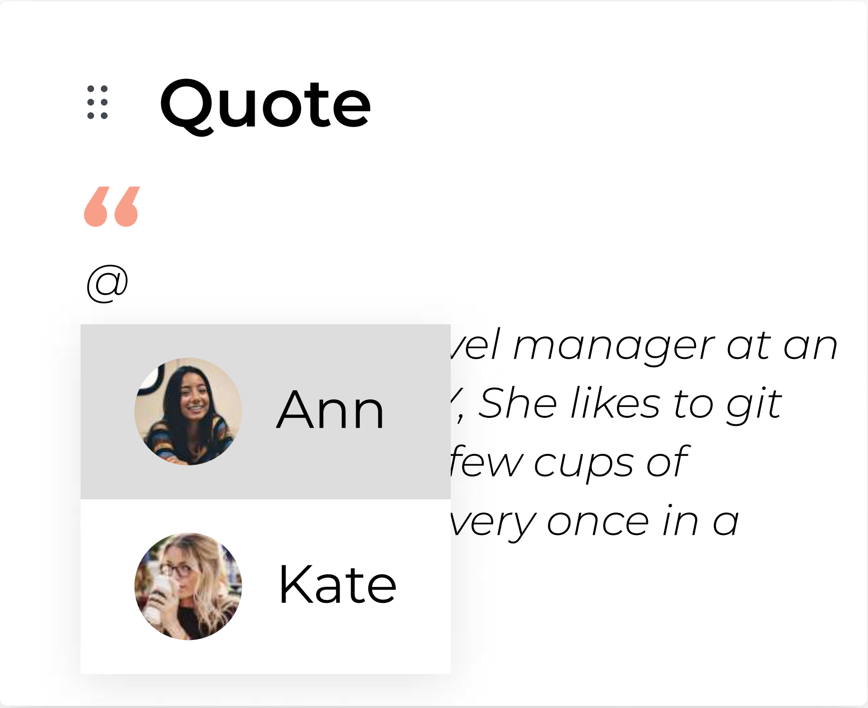
- **Setting up a team workspace**

  If you have a core team that creates and updates personas regularly, you can invite them to your workspace. Users with the Contributor role will get full access to all platform's capabilities, while Viewers will be able to view projects, maps, and personas and leave comments.



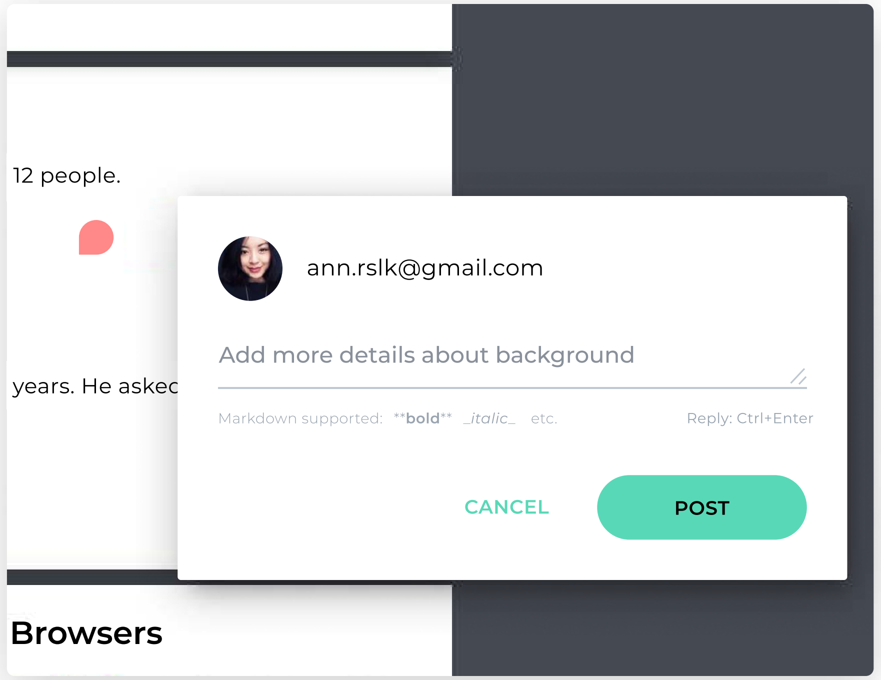
- **@ Mentions**

  Mentioning teammates will help you assign tasks to them or indicate who suggests a specific idea. Type @ inside any text box, and you'll be prompted with a drop-down list with all the teammates who have access to this project. The person you mention will be notified both via email and inside the app.



- **Commenting**

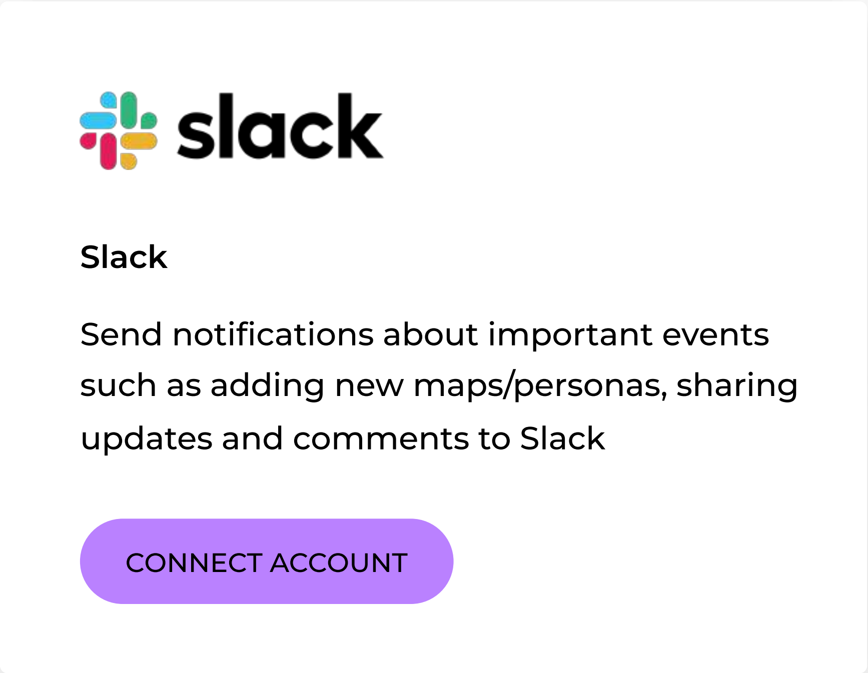
  UXPressia lets you leave comments across personas, resolve them, start threads, and mention teammates. All that happens in real-time, so you can use this functionality to discuss CX insights with your team and clients. And the best thing is that they don't need to be workspace contributors to participate.



KEEPING PERSONAS ALIVE

- **Slack integration**

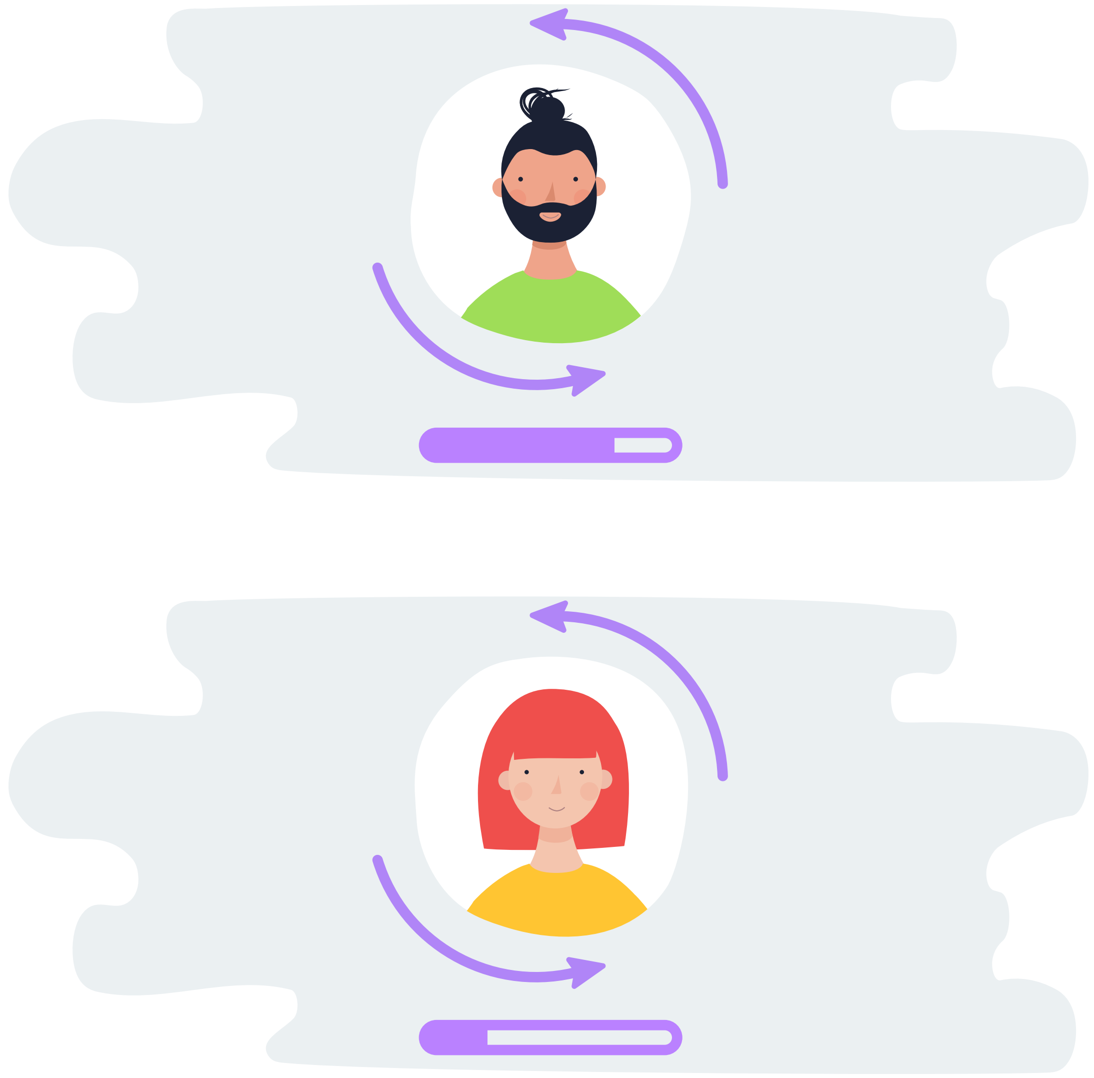
  Integrate UXPressia with the Slack channel that your CX team uses to help everyone in it get instant updates on any persona-related activity and stay connected all the time.



Regularly update your personas

Your customers and business continuously evolve, and so should your personas. Keeping them up-to-date will ensure that you have the latest insights and that you and your team see the as-is state, rather than used-to-be.

Revisit your personas once in a while to see what changed since you last opened them and to brainstorm for more ideas around delivering a better experience to your customers.



Discover more ways on how to make your personas actionable.

Need more tips on creating effective personas? Take the Personas course.

APPENDIX

User interview template

1. Getting to know the user

- Please tell me about your job.
- How and why did you choose this career?
- How long have you been working in the current role?
- Why do you work for this company?
- What's your company's industry, and what's your role in it?

2. Domain knowledge

- What skills help you do your job?
- How do you keep up with your job and industry?

3. User goals

- Please describe your job duties.
- How do you define success or progress in your job?
- Are there any metrics that you use to measure it?

4. Attitudes and motivations

- What do you love about your job?
- What do you value most in your job?
- What motivates you to do a good job?

5. Work processes

- Please describe your typical workday. What do you do?
- How do you perform the following task: ...? Please describe every step you take.
- How much time do you typically spend on such a task?
- Can you show me how you do [a task]?
- What are the major tasks that take up most of your time at work?

- What activities are vital to your success?
- Is there anything that you do during your typical workday because of the industry you are in or your company?
- Have you developed any processes on your own? What are they?
- Does learning from your colleagues help you work better?

6. Working environment

- Is your office organized to help you complete your tasks and reach your goals?
- How do you use the office to accomplish your goals and tasks?

7. Pain points

- Are there any difficulties or challenges that you deal with at work? Is there anything that annoys or frustrates you?
- Do you forget about work when you are not working? Are there any issues that you keep on thinking about when your working day is over?

8. Technology and tools

- Is your office organized to help you complete your tasks and reach your goals?
- How do you use the office to accomplish your goals and tasks?

9. User's mental model

- In your opinion, what types of people are the right fit for your position? Why?
- Describe [a process] and give details on whether it has changed over time. Describe the changes of there are any.

10. Organizational structure and relationships

- Is there someone you interact with at work? Please don't mention your clients and customers.
- To whom do you report?
- Who reports to you?
- Do you usually work on your own or collaborate with your colleagues?
- How do you collaborate with others?

11. Closing out the interview

- Is there anything you would like to share or anything else you would like us to know about you?
- Do you have any questions?

Learn how to ask the right questions during a customer interview with our practical online course.

Thank you

Get in touch with us to start your journey with UXPressia.

support@uxpressia.com

We are looking forward to having you aboard!

Facebook Twitter Linkedin Pinterest Instagram