You Are Not Your User
Proven Techniques for Discovering Who Is
Decisions should be based on users
Knowledge about users must be actionable
Learning about users requires direct contact
You are not your user
Business results depend on satisfying users
The risks of Genius Design
Your user probably isn’t like you
Your users are a multitude
You might be a genius, but what about your team members?
**Personal Profile**

Francis and her husband Michael have dreamed of owning their own home for years, and love to look through real estate listings together on Sunday mornings. Now that Michael’s promotion has come through, they can finally get serious about it. The only problem is, Francis has no idea where to start.

She has ideas about what they want: newer home, closer to the city, 3 bedrooms, pool. But she knows she has a lot to learn about real estate, and she’s intimidated by the number of factors and decisions. What can they really afford? How can they avoid buying a home in an area they won’t like? Francis simply doesn’t know all the steps involved in buying a house, and is reluctant to ask her home-owning acquaintances dumb questions.

What Frances wants is a site that will explain the whole process without drowning her in confusing jargon. But she also wants it to have everything she needs to actually begin the process and look for houses, so she doesn’t have to go to multiple sites. She likes sites that are friendly and straightforward, especially the ones that remember who she is so she doesn’t have to enter her information each time. But most of all, she wants to use a site that she can trust to give her good advice and good information.

**User Goals**

- Learn more about the home-buying process, including jargon, realtors, mortgages, insurance, and how to evaluate houses
- Find out what they can afford based on current rates and first-time buyer programs
- Discover what areas of Atlanta are desirable, taking into account schools, taxes, mass transit, crime, etc.
- Find a house that matches their criteria
- Find the best mortgage lender
- Find the best homeowners insurance

**Business Objectives**

- Visit the site often (ad revenue)
- Register for email alerts and newsletters
- Subscribe to premium services
- Follow through on individual listings by contacting realtor
- Follow through on mortgage and insurance by contacting partner
- Recommend the site to others

**Personal Information**

- **Profession:** Registered Nurse, Northside Hospital
- **Location:** Atlanta, GA
- **Age:** 33
- **Home life:** Married to Michael (pharmaceutical sales); no children, but planning to start a family soon
- **Hobbies:** Cooking, matchmaking among her many friends, tennis
- **Favorite TV shows:** Oorah, The Apprentice
- **Personality:** Outgoing, friendly, a bit meddling, detail oriented

**Real Estate Information**

- **Current home:** Apartment south of downtown (for 6 years)
- **Household income:** $70,000
- **Savings:** $10,000
- **Credit:** Good
- **Purchase timeframe:** 3-6 months
- **Real estate knowledge:** Low

**Internet Usage**

- **Internet experience:** Intermediate (online 2 years)
- **Primary uses:** Shopping, email, horoscope
- **Favorite sites:** Coolsavings, Peapod, GAP, E Online
- **Hours online per week:** 3
- **Computer:** iMac, 56K modem, Internet Explorer 5
Personas build empathy
Personas encourage consensus
Personas create efficiency
Personas lead to better decisions

**Personas for Strategy**
Framework for business decisions, offerings, channel usage, features

**Personas for Marketing**
Framework for marketing campaigns, branding, messaging, market research

**Personas for Design**
Information architecture, interaction design, visual design, content development, user testing
Discovering Your Users
Myth: Research = Doing what users tell you
Truth:
Research = Platform for imagination
The landscape of user research and testing

GOALS & ATTITUDES
(ASPIRATIONAL)

Collages
User Interviews
Focus Groups
Diary/Journal Studies
User Advisory Panel
Card Sorting
Customer Support Data
User Surveys

QUALITATIVE (INSIGHTS)

Shadow Shopping (Shop-Along)
Field Studies (Contextual Inquiry)
Participatory Design
Intercepts

BEHAVIORS
(ACTUAL)

Usability Testing
Eye Tracking
User Reports
Automated Usability Testing

QUANTITATIVE (VALIDATION)

Site Traffic/Log File Analysis
A/B Testing
Approach 1: Qualitative personas

- Qualitative Research
  - User interviews
  - Field studies
  - Usability testing

Goals & Attitudes

Behaviors

Segmentation

Personas
Why bring more science to persona creation?
Approach 2: Qualitative personas w/quantitative validation
Approach 3: Quantitative personas
Surveys

• Gather data on potential segmentation attributes (goals, behaviors, attitudes)
• Test new opportunities
Site traffic analysis

- Entry pages
- Referrers
- Exit pages
- Common paths
- Feature usage
- Search terms
- Conversion rate
- Duration
- Frequency
CRM data

- Annual spending
- Frequency of purchase
- Products or services purchased
- Channel usage
- Customer support usage
- Length of time as a customer
Quantitative nirvana: Complete user portrait

- Survey data
- CRM data
- Self-reported survey data

What the user does
- Site traffic analysis
- CRM data
- Self-reported survey data

What the user says

What the user is worth
Quantitative segmentation

- Attributes (variables)
- Number of segments
- Segmentation options
- Evaluate options
- Run full analysis
## Quantitative segmentation

<table>
<thead>
<tr>
<th>Question</th>
<th>Cluster 1 Mean</th>
<th>Cluster 2 Mean</th>
<th>Cluster 3 Mean</th>
<th>Overall Mean</th>
<th>Sum of the Squares</th>
<th>Significance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q3: Appearance in local neighborhood or school web sites</td>
<td>1.63</td>
<td>1.08</td>
<td>2.63</td>
<td>1.91</td>
<td>82.75</td>
<td>1</td>
</tr>
<tr>
<td>Q3: Appearance in online city guides</td>
<td>2.17</td>
<td>1.48</td>
<td>3.79</td>
<td>2.48</td>
<td>72.71</td>
<td>1</td>
</tr>
<tr>
<td>Q3: Mentions in local blogs or discussion forums or newsgroups</td>
<td>1.6</td>
<td>1.16</td>
<td>2.45</td>
<td>1.91</td>
<td>71.63</td>
<td>1</td>
</tr>
<tr>
<td>Q3: Mentions in local newspaper web site(s)</td>
<td>1.84</td>
<td>1.3</td>
<td>3.3</td>
<td>2.16</td>
<td>69.41</td>
<td>1</td>
</tr>
<tr>
<td>Q2: Appearance in city or visitor guides</td>
<td>2.27</td>
<td>1.43</td>
<td>2.84</td>
<td>2.3</td>
<td>56.14</td>
<td>1</td>
</tr>
<tr>
<td>Q2: Sponsorship of local events or sports teams</td>
<td>2.29</td>
<td>1.35</td>
<td>2.25</td>
<td>2.14</td>
<td>55.22</td>
<td>1</td>
</tr>
<tr>
<td>Q2: Outdoor advertising</td>
<td>2.34</td>
<td>1.17</td>
<td>2.17</td>
<td>2.04</td>
<td>55.16</td>
<td>1</td>
</tr>
<tr>
<td>Q3: Appearance in classifieds web sites</td>
<td>1.98</td>
<td>1.29</td>
<td>3.1</td>
<td>2.14</td>
<td>53.13</td>
<td>1</td>
</tr>
<tr>
<td>Q3: Ratings/reviews on Web sites with ratings of local businesses</td>
<td>1.38</td>
<td>1.06</td>
<td>2.23</td>
<td>1.63</td>
<td>52.13</td>
<td>1</td>
</tr>
<tr>
<td>Q2: Newspaper and magazine advertising</td>
<td>2.92</td>
<td>1.78</td>
<td>2.56</td>
<td>2.61</td>
<td>50.29</td>
<td>1</td>
</tr>
<tr>
<td>Q6: Search engine optimization services</td>
<td>1.79</td>
<td>2.12</td>
<td>2.52</td>
<td>2.25</td>
<td>49.48</td>
<td>1</td>
</tr>
<tr>
<td>Q3: Appearance in Internet Yellow Pages</td>
<td>2.73</td>
<td>1.83</td>
<td>3.86</td>
<td>2.68</td>
<td>46.42</td>
<td>1</td>
</tr>
<tr>
<td>Q6: Advertising on web sites (all forms)</td>
<td>2.02</td>
<td>2.17</td>
<td>2.64</td>
<td>2.4</td>
<td>45.31</td>
<td>1</td>
</tr>
<tr>
<td>Q2: Loyalty programs/cards</td>
<td>2.76</td>
<td>1.26</td>
<td>1.7</td>
<td>2.04</td>
<td>45.08</td>
<td>1</td>
</tr>
<tr>
<td>Q1: Attract new customers who are visiting the area</td>
<td>3.66</td>
<td>1.84</td>
<td>2.5</td>
<td>2.78</td>
<td>45.07</td>
<td>1</td>
</tr>
<tr>
<td>Q2: Mentions in local newspapers</td>
<td>3.14</td>
<td>1.95</td>
<td>2.96</td>
<td>2.8</td>
<td>41.54</td>
<td>1</td>
</tr>
<tr>
<td>Q6: Search engine marketing</td>
<td>1.96</td>
<td>2.12</td>
<td>2.65</td>
<td>2.33</td>
<td>40.56</td>
<td>1</td>
</tr>
<tr>
<td>Q3: Appearance in industry-specific web sites or portals</td>
<td>2.56</td>
<td>1.97</td>
<td>3.61</td>
<td>2.73</td>
<td>40.44</td>
<td>1</td>
</tr>
<tr>
<td>Q9: I plan my marketing and sales programs extensively</td>
<td>3.02</td>
<td>2.46</td>
<td>2.04</td>
<td>2.83</td>
<td>39.92</td>
<td>1</td>
</tr>
</tbody>
</table>
Making personas real: Creating stories out of data
Components of personas

**Primary Persona**

**Francis**

**the First-Time Home Buyer**

**Personal Profile**

Francis and her husband Michael have dreamed of owning their own home for years, and love to look through real estate listings together on Sunday mornings. Now that Michael’s promotion has come through, they can finally get serious about it. The only problem is, Francis has no idea where to start.

She has ideas about what they want: newer home, closer to the city, 3 bedrooms, pool. But she knows she has a lot to learn about real estate, and she’s intimidated by the number of factors and decisions. What can they really afford? How can they avoid buying a home in an area they don’t like? Francis simply doesn’t know all the steps involved in buying a house, and is reluctant to ask her home-owning acquaintances dumb questions.

What Frances wants is a site that will explain the whole process without drowning her in confusing jargon. But she also wants it to have everything she needs to actually begin the process and look for houses, so she doesn’t have to go to multiple sites. She likes sites that are friendly and straightforward, especially the ones that remember who she is so she doesn’t have to enter her information each time. But most of all, she wants to use a site that she can trust to give her good advice and good information.

**User Goals**

- Learn more about the home-buying process, including jargon, realtors, mortgages, insurance, and how to evaluate houses
- Find out what they can afford based on current rates and first-time buyer programs
- Discover what areas of Atlanta are desirable, taking into account schools, taxes, mass transit, crime, etc.
- Find a house that matches their criteria
- Find the best mortgage lender
- Find the best homeowners insurance

**Business Objectives**

- Visit the site often (ad revenue)
- Register for email alerts and newsletters
- Subscribe to premium services
- Follow through on individual listings by contacting realtor
- Follow through on mortgage and insurance by contacting partner
- Recommend the site to others

**Personal Information**

**Profession:** Registered Nurse, Northside Hospital

**Location:** Atlanta, GA

**Age:** 33

**Home life:** Married to Michael (pharmaceutical sales); no children, but planning to start a family soon

**Hobbies:** Cooking, matchmaking among her many friends, tennis

**Favorite TV shows:** Oprah, The Apprentice

**Personality:** Outgoing, friendly, a bit meddling, detail oriented

**Real Estate Information**

**Current home:** Apartment south of downtown (for 6 years)

**Household income:** $70,000

**Savings:** $10,000

**Credit:** Good

**Purchase timeframe:** 3-6 months

**Real estate knowledge:** Low

**Internet Usage**

**Internet experience:** Intermediate (online 2 years)

**Primary uses:** Shopping, email, horoscope

**Favorite sites:** CoolSavings, Peapod, GAP, E Online

**Hours online per week:** 3

**Computer:** iMac, 56K modem, Internet Explorer 5
Francis and Michael have agreed that she’ll take charge of learning more about the home-buying process. She goes online, does a Google search for “Atlanta real estate,” and follows a link to the site’s home page. She sees that she can search for houses from the home page, so just for fun, she does a quick Atlanta search to see what kinds of houses show up. There are lots of houses in many different neighborhoods, and she easily narrows her results down to the area where she and Michael live, using a map. There are still many results, and she’s not quite sure which search options to use to narrow the search further. Then she notices a link for first-time home buyers and follows it, hoping for basic how-to information.

The link takes Francis to a step-by-step tutorial that explains the whole process, and she immediately feels like she’s found the right site from which to begin her house search. She carefully reads some articles for first-time home buyers, taking notes as she reads. She bookmarks other articles she wants to go back and read later. She also comes across the site’s calculator and starts trying different combinations of numbers to find out what she and Michael can afford. She particularly likes the glossary of terms so that she can finally figure out what “points” are and learn more about different types of mortgages. After an hour and a half of reading, her brain is full, and she shuts her computer down for the day, feeling like she got an excellent start.

The next day, she comes back to the site to look up information specific to Atlanta neighborhoods and finds lots of information on each. She’s able to focus on five neighborhoods that look particularly good. The fun begins that night, when she takes Michael through all that she has learned, and they set up a regular schedule for looking at online house listings.
Using Personas
Persona cards

FRANCIS
the First-Time Home Buyer
"I just don't know where to start!"

VITAL STATISTICS
Job: Registered nurse
Location: Atlanta, GA
Age: 33
Current home: Apartment
Purchase timeframe: 3-6 months
Real estate knowledge: Low

Francis and husband Michael have dreamed of owning a home for years, but she has no idea where to start. She has ideas about what they want, and knows she has a lot to learn about the home-buying process.

Francis comes to the site to:
• Learn about the home-buying process
• Find out what they can afford
• Discover what areas are desirable
• Find a house matching their criteria
• Find the best mortgage lender
• Find the best homeowners insurance
Lifesize cutouts
Persona cubicle
Business strategy
Features and functionality

- User research
- Personas
- Goals
- Scenarios
- Task analysis
- IA & design
Structure
Testing and measuring success
Thanks!

Steve Mulder
smulder@molecular.com

PracticalPersonas.com