# 5779 使用經驗專題設計
User Experience Design Project

Week 6:
Persona

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本週大綱

• Challenges in *Human-Centered Design*
• Some Cases
• Design Process
• Persona
http://www.ideo.com/work/human-centered-design-toolkit/
The Three Lenses of Human-Centered Design

The human-centered approach to innovation integrates the needs of people, the possibilities of technology, and the requirements for business success.

The solutions that emerge at the end of the Human-Centered Design should hit the overlap of these three lenses; they need to be Desirable, Feasible, and Viable.
Generating New Experiences: Requires Two Fundamental Phases

Learning about People Current Experiences

User Research
Ethnography
Anthropology
Statistics

Designing New Experiences

Design
(Graphics, products, services, interactions)
Participatory Design
Business
Marketing

富士幼稚園 ふじようちえん

Source: http://www.wawakids.com.tw/?p=5063
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我在二○○六年接下東京立川市幼稚園的更新企畫案，這項工作就徹底地活用了設計的力量。加藤積一[[2]]幼稚園的教育理念很棒：設計就是要解決問題：加藤積一的創意思考術（賴廷筠譯，pp. 112-6）。台北市：木馬文化。
背包、娃娃車與網站等所有幼稚園的媒體。像這樣透過設計將幼稚園的特性與願景具象化後，引起超乎想像的回響。希望

在幼稚園來說非常重要，這樣一來，也能解決這個問題。最後，幼稚園甚至登

課程，才能讓社會大眾更了解幼稚園的價值。

在這個資訊爆炸的時代，若是要傳達自己的想法，設計是非常好的武器。請各

位一定要重新認識設計原本的意義，活用它最大的力量。
Challenges in Human-Centered Design

1. **Being user centered is just not natural.** Our more natural tendency is to be self-centered.

2. **Users are complicated and varied.** And unfortunately, it is sometimes the case that pleasing some users in a given situation necessarily conflicts with pleasing others.

3. Those doing the **user and market research** are not typically the people who actually design the product. If the important information about users isn't available at the right time, product teams forge ahead with designing features they **think** the users would like.

Benefits of Personas

- Move beyond our habit of referring to "users" and find a better way to communicate about and focus on real people — the people we want using our products. (p. 7)
- Personas put a face on the user — a memorable, engaging, and actionable image that serves as a design target. (p. 11)
- They focus and clarify communication around the qualities and needs of target users. (p. 170)
- ...
Some Examples

- Apple
  - Show And Tell (Macintosh)
  - Macintosh Quadra 700
  - Siri (iPhone 4S)
  - Facetime (iPhone 4)
  - iPad 2

- Motorora
  - Xoom

- Asus
  - PadPhone 2

- Samsung
  - Galaxy S4

- HTC
  - HTC One
Reference of Persona

- **Chinese Introduction:**
  [http://www.slideshare.net/uxstudio/kickoff-day21](http://www.slideshare.net/uxstudio/kickoff-day21)

- **Book:**
The Usage of Persona in Microsoft

- There are over **12 different development teams** and over **3,000 people** working on *Windows Server*.
- Most of the teams work on specific server functionality that is used and managed by unique individuals in the IT organization.
- That being the case, we have a significant challenge in helping each of these teams identify and design for its target users.

Background

- Historically, the Windows Server product team has relied on market research data and intuition in understanding who their customers are and what they need.

- Over the past few years it has become increasingly clear to the leadership for Windows Server that to better meet our customers' needs we need to understand who they really are.

- Because personas had been developed by other teams at Microsoft, those personas were gaining exposure and credibility. It became apparent that there needed to be personas developed for Windows Server.

Process: Classic Waterfall Model

FIGURE 2.3: The same classic “waterfall” model of software development (shown in Figure 2.2) with persona lifecycle phases added. Note that the persona lifecycle requires customer-focused activities before the “start” of the development process. Adult personas become important in the Analysis phase.
5 Phases

1. Persona Family Planning
2. Persona Conception and Gestation
3. Persona Birth and Maturation
4. Persona Adulthood
5. Persona Lifetime Achievement, Reuse, and Retirement
1. Persona Family Planning

"Let me get to my code"

-Eddie
Enterprise Developer

"Just push the button and it's deployed!"

-Tim
IT Implementer

"Don't bother me, I'm troubleshooting"

-Sandy
IT Operations

FIGURE 2.7: Persona silhouette posters with tag lines.

2. Conception and Gestation phase

During the conception and gestation phase, your goal is to create a set of personas that are:

- **Relevant to your product** and your business goals
- **Based on data** and/or clearly identified assumptions
- Engaging, enlightening, and even inspiring to your organization.

Your Goal

• Your goal is *not* to describe every possible user or user type,
• nor to detail every aspect of your target users' lives.

• Your personas will aid decision making by both
  **narrowing the field of possible targets**
• and **highlighting user data** that is **important and highly related to the product** you are creating.

Frequently Asked Questions

• How many personas do I need?
• Which personas do I need?
• Which personas should be primary or secondary?
• How do I use secondary personas without designing "for everyone"?

Best Way to Answer those Questions

• To analyze user goals, user roles, and user segments to **identify important categories and subcategories of users** of your product.
• For each category and subcategory, you will create at least one skeleton persona.
• You can **prioritize your skeletons** according to business and product objectives.
• Finally, you will **enrich** your prioritized skeletons to create personas.

Tips

- Top-down buy-in for your persona effort is important. If people (especially stakeholders) are uncomfortable with your cast of personas, they will not support or use them. (p. 171)
6 Steps in Conception and Gestation phase

Conception
1. Identify important categories of users.
2. Process the data.
3. Identify and create skeletons.

Gestation
4. Prioritize the skeletons.
5. Develop selected skeletons into personas.
6. Validate your personas.

FIGURE 4.2: This diagram illustrates the activities described in steps 2 through 5 of our conception and gestation process. The conception and gestation phase starts with raw data reports, which you will analyze and filter into factoids and organize into “information” to form categories of users. From these categories, you can create terse “skeletons,” which you can then evaluate and prioritize. You can develop the prioritized skeletons into rich representations of target users; that is, into personas.
Step 1. Identify important categories of users

Thinking about user roles, user goals, and user segments

• **User Roles**: When you describe a person according to sets of tasks, job descriptions, responsibilities, or other external factors related to his or her interaction with your product.

• **User Goals**: When you describe a user in terms of what he or she is trying to achieve.

• **User Segments**: When you describe a user in terms of characteristics he or she shares with many other users. Segments are defined according to shared demographics, psychographics, attitudes, and/or behaviors. In marketing, segments are often used to create targeted messaging and advertising to increase product sales.

Step 1. Identify important categories of users
Thinking about user roles, user goals, and user segments

Step 1. Identify important categories of users

Scenario: Create Service for a Bank

User Roles:
- The new account shoppers
- The existing account holders
- The borrowers
- The investors

Goal-based categories of users:
- Users who "want my financial life to be simpler"
- Users who "want my money to work for me"
- Users who "want to feel like my money gets as much attention as a millionaire's money"
- Users who "want to feel safe when I'm banking online."

Step 1. Identify important categories of users

Scenario: Create Service for a Bank

User Segments:

- **Financial enthusiasts**: 35 to 65 years old, urban or suburban, professional, college educated, yearly household income of $50K-$250K …

- **Financial ostriches**: 25 to 40 years old, urban or suburban, professional, college educated, have children, yearly household income of $35K-$90K, busy with life and work, seldom reviews financial decisions…

- **Financial neophytes**: 18 to 25 years old, some college, yearly household income of $10K-$60K (with potential for considerable income growth), newly financially independent, tend to be interested and motivated but nervous, very aware of current financial status …

Step 2. Process the Data

Source #10

following folders: Misc (which has all the different search engines), NBA scores, music, video games, and school work.

Natalie searches by typing in keyword: "WWW", which takes her to the AOL search page. She then types in her search query and goes from there. She doesn't really distinguish between AOL content and internet content, and doesn't always know whether she is in one or the other. She does recognize that there is a difference, however. She is interested in browsing through online catalogs to look at clothing. She typically visits JCrew, Ann Taylor loft, and Nordstrom secret. However, she doesn't buy anything online because she likes to go try things on first.

Online Shopping

None mentioned by either child or by the parents with specific regards to the children. However, Mom mentioned that usually she is not very comfortable with giving out her credit card info, but for something like this, she doesn't mind. The site cost $25.00 to subscribe.

Parental Controls

Glen Set up Parental Controls for every person in the house. Matt has the young teen settings and Natalie has the mature teen settings. Frequently when Matt is blocked from sites that he needed for school projects, he would use Glen's account. Glen is aware of that and is okay with it.

Site #9 — (Mom, Dad, daughter, and son)

Jessica, the 18-year-old daughter, is a Junior in high school who started using PCs in 4th grade. At school, she doesn't use the library or the computer much anymore because she does most of her research at home using the Internet or maybe Enfesta. She is an active member of the NFTY (religious) youth group and communicates with the members through email. NFTY members are all around the nation but mostly up and down the West Coast. She used to get online immediately after school but now she's working so it depends on whether dad gets home fast or not. Watching her computer usage, all of her actions were very quick, deliberate, and knowledgeable. She used keyboard shortcuts to navigate, and she kept "email, IM, and welcome" minimized as the base of the AOL app, double-clicking them to restore them.

Will, the 14-year-old son, is an 8th grader who started using PCs in his 5th grade computer lab. At school, he doesn't use the computer much because they use Macs, and it's hard to transfer files. Therefore, he handwrites at school. At home, he does school projects and research, plays games when he's bored, and emails his friends. Will will also be on the NFTY youth board as head of membership starting next year. He

FIGURE 4.6: An example of two factoids identified in a qualitative research document (field study report) and transferred to sticky notes.
Step 2. Process the Data

FIGURE 4.7: Seed the walls with your user category labels. (Photograph courtesy of Jonathan Hayes.)

Step 2. Process the Data

FIGURE 4.9: Categories of users (white), cluster labels (pink), factoids (blue), and assumptions (yellow) after an assimilation exercise. In this illustration, we show the labels (pink) much larger than the sticky note clusters. This is simply so that you can read the cluster labels. We recommend that you use sticky notes to label the clusters of factoids (in this example, blue stickies) and assumptions (in this example, yellow stickies) you find during your assimilation exercise because this facilitates moving and changing the labels as needed.

Step 3: Identify Subcategories of Users and Create Skeletons

Step 3: Identify Subcategories of Users and Create Skeletons

座標獵人
代號：Soya (M)
年齡：40
Smart Phone：HTC
高科技公司的工程師，夫妻二人都喜歡旅遊並且收集紀念物。愛玩Geocaching尋寶遊戲。

特徵：
• 運導登百岳
• 319縣市蓋章趣與各地星巴克杯
• 住到哪裡玩到哪裡
• C/P值為最大優先考慮
• 朋友團行程規劃應付別人問
• 主動使用原生google搜尋
• 講當地人的語言
• 交通工具分享：四人行
• 看圖說故事，詳盡的網誌
• 下載離線地圖：分級分層

鐵騎型男
代號：蛙 (M)
年齡：40
Smart Phone：iPhone
咖啡館 + 設計公司老闆，偶爾兼差幫雄獅旅行社帶單車團。

特徵：
• 出旅遊書書寫單車環島與攝影
• 跟不同人有不同的規劃
• 先決定訂房、位置再決定當日行程
• 騎腳踏車的時速決定行程的安排
• 喜歡走一條別人講走過的路
• 先自行過濾後減少地雷
• 留下名單，到了當地才決定
• 遺珠之憾資料庫
• 我做到了的成就感
• 不常用手機拍而用專業相機
• 照片先挑過才上傳

Source: http://www.slideshare.net/uxstudio/kickoff-day21
Step 4: Prioritize the skeletons

- Most business do make 80% of their profits from 20% of their customers,
- So it is good to see if these customers have important behavioral/attitudinal differences.

Step 5: Develop selected skeletons into Personas

- Your task at this point is to enrich these skeletons to become personas by adding data as well as concrete and individualized details to give them personality and context.
- You will also include some storytelling elements and photos to make the personas come to life.

Step 5: Develop selected skeletons into Personas

Try to include at least rudimentary information in each of the following categories of persona characteristics:

- Identifying details
- Role(s) and tasks
- Goals
- Segment
- Skills and knowledge
- Context/environment
- Psychographics and personal details

Step 5: Develop selected skeletons into Personas

An example skeleton (left) being transformed into a foundation document (right)

**Parent (skeleton)**

**Demographics:**
- People who make enough money to have two computers in their home tend to live in major metropolitan areas (source 3, p 1)
- etc.

**Work:**
- 85% of parents surveyed work full time in white-collar professions (source 5, p 2)
- etc.

**Goals, fears, aspirations of parents:**
- Mothers are more concerned with their child’s behavior online than fathers (source 2, p 10)
- etc.

**Irene Pasquez, the involved parent (1)**

**Foundation document**

**Overview:**
Irene lives in a suburb of Houston (2) with Emanuel, her husband, and her one child: Preston, who just turned 5.

Even though Irene works full-time as a manager in a local branch of Bank of America (3), she is heavily involved with Preston’s daily activities and has the opportunity to see him during the working day because... etc.

**Data references**
1. Mothers are more concerned with their child’s behavior online than fathers (source 2, p 10)
2. People who make enough money to have two computers in their home tend to live in major metropolitan areas (source 3, p 1)
3. 85% of parents surveyed work full time in white-collar professions (source 5, p 2)

Step 5: Develop selected skeletons into Personas

Oden, the “occasional user.”

How does Oden use XDocs?
Oden, a senior planner, uses XDocs because that’s what his company uses.
- He uses forms created by Nick, Cara or Dawn.
- Oden regularly uses some forms, such as status report, but uses several forms (for example, expense report or performance review) infrequently enough that every time is a new learning experience.

What’s important to Oden?
For Oden, the easier XDocs is the better. He says: “just make filling out this paper work easier.”
- Pre-populating fields with past values, like expense or department codes, is a big win because it keeps Oden from having to continuously look up information.
- Oden wants inline instructions, ToolTips, and easy ways to get the information that he needs to quickly and accurately fill out forms.
- He expects error messages to help him find and fix problems.
- Because Oden sometimes works from home and travels occasionally, he wants to be able to work offline.
- He expects the user model for opening, saving, and submitting the form to be very simple.

Other commonly used tools:
Works extensively with Word and Excel.

Related job titles:
Oden represents a typical end-user, and similar positions include project managers, analysts and department managers.

Related personas:
Ed, the end-user from the Office Designer personas.

Step 6: Validate your Personas

- Check back in with your data
- Have subject-matter experts review your personas
- Show your personas to real users
- Conduct "reality check" site visits
- Create persona profile screeners
- Conduct large sample surveys or interviews