

PERSONAS & USABILITY

Personas in General

Given the overlap in the areas of Usability, general User Research and Persona development, it can be easy to cloud the distinctions among them. One of the ways designers can maintain important distinctions of Persona development is to think of it as a *conversation*. Personas are generally developed via inquiries and ethnographic research. Both methods are typically conducted *in context*—meaning that the research is done in the user/customer's own environment.

The insights gleaned from these types of interactions are myriad, since they're not just an anonymous person on the other side of a computer, answering questions. Of course, anonymous surveys can be immensely helpful, but are most useful when you already know who you are hearing from (i.e., when you've already met & developed your personas).

Another way to describe the distinction personas research from other types of user research might be to say: A Persona is a composite of characteristics and behavioral traits, with a focus on what drives those behaviors (motivations). It's not just about demographics or customer segments. The key is that we're looking for nuances and specifics that can't really be obtained through a site survey.

Persona Research Methods

As mentioned above, there are different ways to go about creating personas. Some of these methods take from months to a year, while "Lean UX" methods can develop 1-2 personas in a matter of weeks.

Interviews

This method involves talking to your customers in person, and generally one-on-one. If there is not enough time to conduct one-on-one interviews, group sessions can be very helpful, depending on the exercise and what you're trying to glean. If you're talking to customers from different walks of life, it's best to speak with them separately. Group sessions are mainly useful when you're talking with people from the same or similar organizations.

When interviewing customers—potential or existing—it is critical to keep the “conversation” concept in mind. It is, of course, important to have a top-priority list of questions that need to be covered, but the research role when building personas is more akin to that of the Observer; you want to learn as much as you can about the person, his/her business, his day-to-day and general use of technology.

After interviewing ~12 or more individuals, you will start to see patterns arise. *However*, something to keep in mind is that in our situation, we will likely be dealing with an array of business types, and there will likely be more distinct patterns within those groups. (For example, we may talk to people from software companies, as well as people who own retail stores, and their needs may be significantly different.)

Ethnographic Study

This is obviously not something our team will be doing, but it might help to have an idea of how in-depth this research can get. Teams with the budget and time—as well as the need—will often conduct ethnographic studies in order to get a deep, well-rounded understanding of their customer base. One thing to clarify is that “ethnography” in this context is a loosely used term; in Anthropology, this would refer to the observation of (and potentially interaction with) a particular ethnic/cultural group. In our cases, it refers to diving into the details about a customer segment (e.g., retail business owners with a company that is between 3 and 7 years old and 100-200 employees.)

Ethnography requires observing behavioral patterns over a period of time, while asking questions about why they do certain things, as well as asking other questions that come up. Methods of observing include in-person observation as well as having customers/users keep diaries of their actions throughout their day.

Subject Matter Expert (SME) Interviews

For cases in which it is impossible to observe or interview customers in person, the next best thing is to talk with SMEs who know the customer like the back of their hand, so to speak. The key to making these truly useful is validating them in any way you can (with analytics, survey, or other kinds of data).

Some ways to collect persona-related information from SMEs:

- Sit in on Support Center calls
- Read Support conversation transcripts
- Interview/observe consultants or account reps who work with customers

How Will Our Team Conduct Persona Research?

1. What are our high-level goals for Persona research?
 - a. Assumption: We are trying to increase traffic to all the sites.
 - b. Do we aim to influence the *content* on our sites?
 - c. Do we want to only focus on the *interaction design* of the sites?
2. Who are we trying to learn about?
 - a. Are we mainly interested in *existing* customers?
 - b. Would we like to identify *potential* customers, as well?
3. How do we identify who we'd like to talk to?
 - a. The Enterprise team clearly has a target customer, we just need to prioritize which targets are most important and find good examples of them.
4. What are our resources for being able to gather any information?
 - a. Does anyone work with random people who visit the site (e.g., site support, not sales)?
 - b. Can we do in-person interviews, and how do we identify interviewees?

Site Usability

Generally speaking, it's ideal to develop personas before switching focus to usability. However, in our case, there is an existing site with existing content and existing visitors. Therefore, we can, in tandem, learn more about the people who currently traverse the Enterprise websites and use that information to further improve content and design.

As I have gone through our sites, read some of the content and experienced the interactions, a few questions have continued to arise for me. I'm hoping these questions will be helpful in designing our persona development process. **NOTE:** My assumption here is that we have the desire and ability to influence content creation as well as design with personas. For any marketing site, the content is at least as important as the interaction & visual design.

Basic Knowledge of Site Visitors

For me, this is the biggest question, and the biggest challenge with getting started on building personas for our team. Perhaps there is existing persona-related data that we haven't seen yet. If not, there is a chance that much of the content that is developed for our sites is based on guesswork. We can only address this by starting with gathering the very most basic information about site visitors.

What kinds of companies do visitors typically work for?

Given how technology-dependent our world is today, I can envision any type of business (of a certain size) finding the need for AT&T Enterprise products and services. But in order to know who we're writing & designing for we need to have a fundamental understanding of our main personas. Are they other technology professionals? Do they

Who Actually Visits the Sites & Reads the Content?

Admittedly, I don't have any substantial information about what the AT&T Enterprise Marketing team knows about site visitors, but one thing that nags at me is this: We seem to focus a lot on *Decision Makers*. Clearly, individuals in this role are critical to lead generation. **But I wonder: how many CEOs, COOs, CTOs, VPs or similar are actually the ones responsible for researching & gathering information on potential technology solutions for their companies?** In my experience (in working as well as researching), it's someone at a lower pay grade that's responsible for putting together the "pitch" for solutions to any problem. If this is true in the case of our sites, who then is coming to learn about what AT&T Enterprise has to offer?

What Level of Familiarity to Visitors Have with our Technology?

When I read many of the informational/introductory documents & pages on the Enterprise site, I'm largely left with many questions. Perhaps this is simply because I'm not the target customer, but I wonder: does the target customer know the basics about SIP Trunking or Network Sourcing or any of our other technologies, products and services? Are people looking for this information the people who specialize in these areas? Or are they people who are in this situation:

I need a way to solve problem "x" and I have no idea what exactly will solve that. I guess I'll Google "problem x" and see what I come up with.

If the above is closer to the truth **at least when it comes to customers finding our pages/solutions in the first place**, do we have content arranged in the appropriate way?

Other Site Questions

What is the most sought-after information?

What is the most common path to our site?

What is the typical age range for site visitors?

What is the level of education completed by most site visitors?

Existing Usability Data

Are there roll-ups of analytics for all the sites we work on? An example would be: viewing a report that show which pages have the highest traffic and from which regions; which pages have the highest drop-off.