METHOD

PERSONAS

Area of CoP Activity:	Learning and Developing Practice
CoP Lifecycle Phase:	Inquire Design Prototype
CoP Success Factor:	Learning Supporting tools and resources Strategy
EIGE Step:	Step 2: Analysing and Assessing the State-of-Play in the Institution Step 6: What Comes After the GEP
Group Size:	8-30
Difficulty Level:	♛ ♛ ♛
Time Needed:	🕐 🕐 🕐
Facilitator Preparation:	📖 📖 📖
Participant Preparation:	✏ ✏ ✏
Description:	Personas is a useful tool to identify and communicate complex data about a target group and to bridge the gap between design/implementation team and target group, by creating a vivid personal representation of the group. Use the method as a reference point to focus on GEP, policy, or practice outcomes creating "How might we" questions and generating ideas.
More Information:	www.interaction-design.org/literature/article/personas-why-and-how-you-should-use-them

ADAPTABLE ONLINE

PERSONAS NEW

Short description

This activity helps in designing impactful policy interventions. You achieve this by creating personas - *fictional* characters - based on your team's research to represent the different policy/practice/intervention end-users who will benefit from your action. Creating personas will enable you and your team to understand your end-users' needs, experiences, behaviours and goals. Importantly, this activity will help you and your team step out of yourself and empathise with your target group. It can help you to recognise that people have different needs and expectations. Personas will require several meetings with your community/team to conduct **ten important stages** from finding you end-users to the ongoing development of the interventions.

When to use

If you want to identify and design effective and efficient, targeted policy/practice interventions for the specific end-users that need support.

How to

A: Brief description

Personas require a structured, systematic plan of actions and meetings planned in advance to enable you and your team to carefully and methodically create your personas and the desired interventions. These meetings can easily take place online (recommended), as many shorter meetings might be required, rather than few long ones. Shorter meetings can also act as 'checking in' to ensure people know and fulfil their role effectively during the Personas activity process.

B: Detailed step-by-step guide

Invite your participants to an introductory face-to-face (1 hrs), or an online meeting (no more than 1.5 hrs). Each consecutive meeting can last longer depending on which stage of the activity you are. When you meet for the first time with this idea in mind, make the point of this method clear:

What exactly do you use the Personas for and what intervention will they be used for?

GEP? Policy intervention? Best practice implementation? Innovative action to support your end-user?

We do not prescribe how often or for how long you should be meeting with your participants. Rather, the structure for this process should be co-created and agreed with your participants before embarking on the activity to find the best way to organise it. Therefore, the description below allows you the flexibility required in your specific context and to suit you and your participants' needs.

Make sure that in the first meeting you describe all the ten stages of the activity. From a web page source, you can provide an example to your participants to illustrate what Personas description looks like so that they know what they are going to be working towards. You can find some examples on the www.interaction-design.org website (see previous page for full url), however **use these examples very generally, as they do not reflect the ACT CoPs' agenda context.**

Stage 1: Find your end-user

In this stage of the activity, decide with your team who you want to support/help through your intervention. Ask questions such as: Who are your end-users? How many of them are there? What do they typically do? Why should they benefit from your intervention?

Stage 2: Build a hypothesis

What are the differences among these users you have identified? Try to analyse any material you might have, group and label the users.

Stage 3: Verify your ideas

This stage will require fieldwork by the participants. Divide them into teams ahead of the meeting and get them to research the following:

Data for your personas (likes/dislikes), data for situations (area of work, work conditions), data for scenarios (work strategies and goals; career strategies and goals, family strategies and goals).

To gather this information, you may want to consider interviews, focus groups, informal chats with your end-users and other stakeholders closely working with them. Ensure anonymity at all times.

Stage 4: Find patterns

Discuss your findings from fieldwork and decide if the initial grouping you conducted in Stage 2 still holds. If not, correct, re-frame and re-label. Your fieldwork might have clarified some unknowns about your-end-users which will have to be reflected in the original groupings and characteristics of your personas. Are there any other groups to consider? Have you neglected anyone who also requires your attention? Are all personas/groups equally important? Or perhaps you need to be focused on one/two specific end-users?

Stage 5: Construct Personas

This activity works best in groups of people who work for 45-1 hr on constructing a thorough picture of a persona. Get the participants to ask the following questions to help them create their persona:

  ➢ Body (name, age, picture sketch, photo from a photo stock) – this will give you a genuine impression of your end-user, even though it is fictional.
  ➢ Psyche (extroverted, introverted)
  ➢ Background (is this relevant in terms of their department, subject area, seniority level, other characteristics of their context)
  ➢ Emotions/attitudes (to the institution; to the work/career/family issues; to opportunities and possibilities)
  ➢ Personal traits (are they relevant to your interventions?)

Stage 6: Define situations and design interventions

Answer questions such as:

What are the needs of this persona? What are the situations in which this persona finds themselves? How could they benefit from an intervention and in what situation? What is the most effective, efficient, and targeted support mechanism for your end-user?

Stage 7: Validate/buy-in

After creating the Personas and the situations, get your participants to validate what they have created. Of course, this persona is fictional, but do you know someone similar to this persona? Get the participants to listen and then comment how well the persona captures the real person. Have you omitted anything important? Have you added unnecessary, spurious traits that will not help you design a relevant intervention?

Stage 8: Disseminate the knowledge

If you and your participants are confident that your personas are well captured and effectively represent the end-user who could benefit from your interventions, get the participants to brainstorm how you can share this persona (or a set of personas) with the organisation or the institution and the stakeholders it will affect. Ask the persons you think your personas represent. Make adjustments if necessary.

Stage 9: Create scenarios

This stage will require your imagination again, as you need to imagine in a given situation, with a given goal, what happens when the persona uses your intervention? Use a narrative scenario using personas descriptions and situations to form scenarios.

Stage 10: Ongoing development

Develop your intervention and implement it. After a period of time, reconvene to discuss if the new intervention alters the personas. How effective is the intervention? Has it shaped your personas? Collect new information through feedback, interviews, focus groups, informal discussions, usability reports, etc.

REFERENCES

Friis Dam, Rikke and Siang Teo Yu 2021. Personas. Interaction Design Foundation. Available from: www.interaction-design.org/literature/article/personas-why-and-how-you-should-use-them