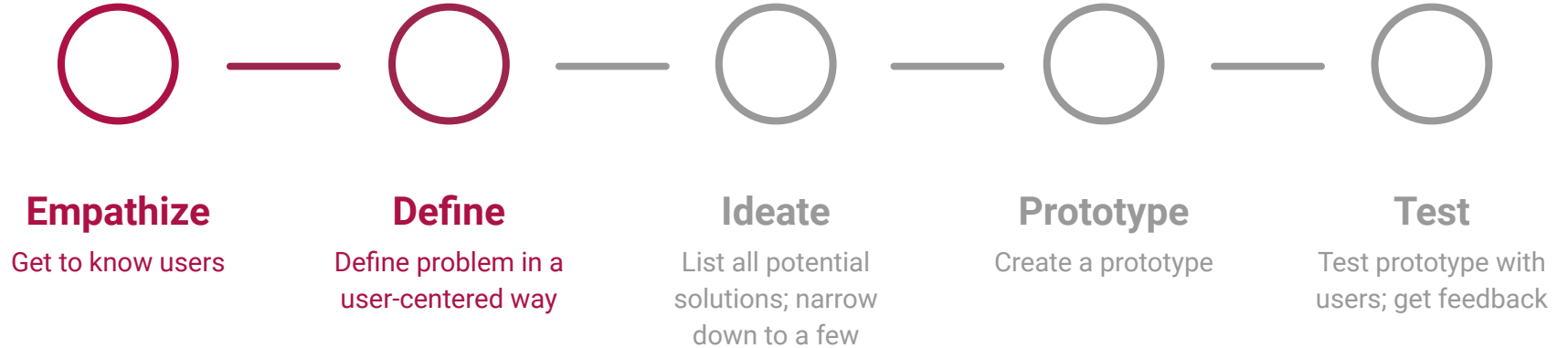


# UX Research

## Lesson 6: Persona Research

# Design Thinking



# Persona Building

- **Persona** – *Who are you designing for?*  
Characters used to represent different customer types
- **Use case** – *What are you designing for?*  
Goals for how the product will be used



# Persona Building

- **Goal:** Help product designers understand and empathize with target users
- Make sure personas resemble actual users
  - Conduct interviews
  - Get data about current customers
  - Aim for 3-5 personas



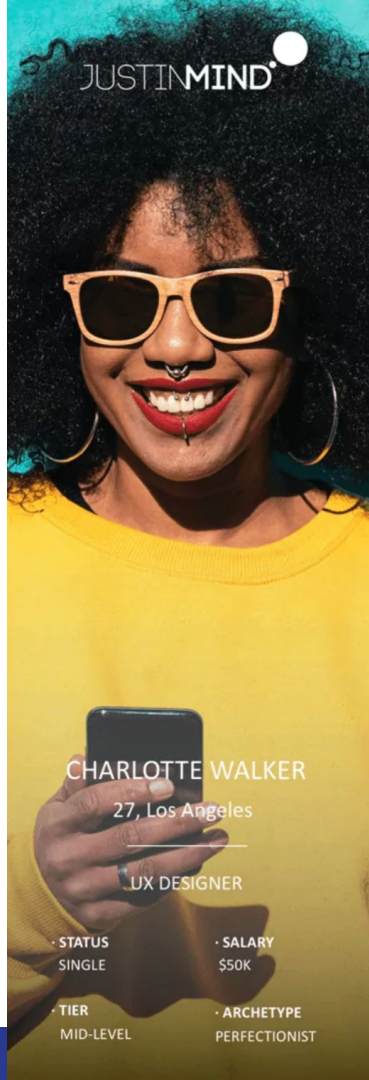
# Persona Building

- Name
- Demographics (age, income, gender, location, occupation)
- Bio
- Personality
- Behavior patterns
- Pain points
- Goals
- Quote



# Persona 1

Example



## PERSONALITY

- Prototyping
- Interviewing
- Design Thinking
- Empathy
- Coding

## BIO

Charlotte recently started a new job as a UX design in a mid-size bank. She moved over from the start-up world and is still getting used to all the changes, particularly the paperwork. She's excited to bring a user-focused perspective to the design department but nervous because she's the bank's first UXer.

Outside of the office she's a sports-mad psychology grad. She enjoys reading UX blogs and will sometimes go to UX-related conferences if they're nearby. She's also tuned into design channels like Dribbble.

## Motivations



## Goals

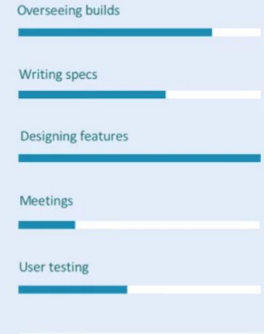
- Introduce user focused mentality and methods into traditional company landscape
- Improve usability of bank's customer facing interfaces
- Grow the UX team

## Frustrations

- Getting buy-in for the new department's activities
- Dealing with more bureaucracy than in her old job
- Communicating necessity for change to development team

“I want to help my team deliver great user experiences”

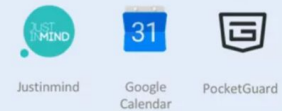
## Behavior



## Influences

- CREDIBILITY
- COLLEAGUES
- TECHNOLOGY
- BLOGS/ FORUMS
- PSYCHOLOGY
- UI TRENDS

## Frequently used apps



# Persona 2

Example

## LISA MONTOYA



“ We must optimize our processes, implement new systems, learn to adapt. It's worth the effort in the end. ”

**Age** 32  
**Occupation** Software Architect  
**Status** Married  
**Location** New York, NY  
**Tier** Multi-use  
**Archetype** Problem-solver

### Bio

Lisa is the software architect at Blue Cable. She sees that larger companies have a difficult time implementing improvements. She wants to streamline communications and automate as many things as possible, to maintain an agile team.

### Goals

- Discover new tools for communication, reporting, tracking and measuring
- Use small teams for large projects
- Update old frameworks to meet present standards

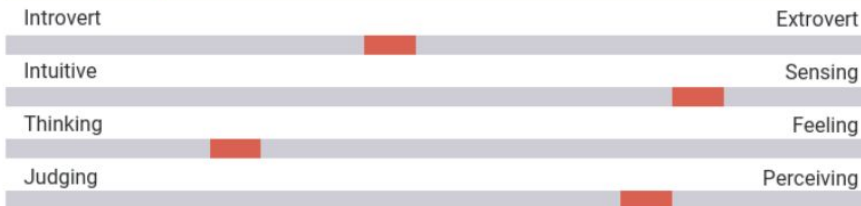
### Frustrations

- Change is always met with resistance
- Learning curves slow down productivity
- Larger companies are more risk averse

### Technology



### Personality



### Trusted Brands



# User Segments

## Segmentation

- Grouping the “market” (customers) into segments based on characteristics
- Should be based on real data (surveys, social analytics, purchasing behaviors)
- Discover trade-offs between different personas





# User Segments

- Demographics (age, gender)
- Psychographics (interests, attitudes)
- Technology (desktop vs. mobile, type of phone)
- Geography (location, timezone)
- Product behaviors (frequency of product use, purchase online vs. in store)
- Motivations (what do you (dis)like about the product?)



# User Segments

## Net Promoter Score (NPS)



**% PROMOTERS - % DETRACTORS = NPS (NET PROMOTER SCORE)**

[Link](#)

# User Segments

The resulting five segments proved attitudinally differentiated and demographically distinct.



YOUNG ACHIEVERS



CONCERNED MOMS



FINANCIALLY MATURE



HO HUM



SOLO CONTENT

	Young Achievers	Concerned Moms	Financially Mature	Ho Hum	Solo Content
Demographics	Younger Skews male	Young, Middle Age Mostly female	Mature Skews male	Middle Age Mostly female	Mature Male and Female
Attitudes	Early adopters, technical Driven, Risk taker Price sensitive	Use social media, but not otherwise technical Don't know where to begin Price sensitive	Recognize value of insurance Confident about financial matters Least price sensitive	Late adopters Risk averse Not primary decision makers and not thinking about LI	Use social media Mistrustful of financial inst. Least interest in LI
% of US	20%	20%	30%	20%	10%
% of MetLife	50%	30%	10%	5%	5%
Lapse Rate	Low	High	Low	Medium	Medium
Value	High	Medium	Medium	Low	Low

### Target

- Large portion of market
- Right for business model

### Minimize Cost to Serve

- Prefer face to face
- Low conversion
- Lower value

[Link](#)



# User Segments

## 01

### User Personas

A persona is simply a user archetype whose goals and behavior patterns are well understood. Personas include attitudes, behavior patterns, goals, skills, and anything else needed to create a specific, relatable, and actionable portrait for the specific product, with a few factual details and a photograph to help bring the persona to life.



**PERSONA 1**

Meet  
**ELLEN**  
Married, Housewife, 44 years old  
Cape Town, SA

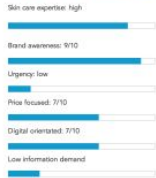


*"I hope to find specials to help me save money."*

#### Goals

To purchase an Environ product that she already uses from the site. She likes to use product reviews and recommendations from other people to aid her in buying a product. She would like to know what special offers exist on the Environ site and is concerned about delivery, shipping and return policies.

#### Hobbies



#### Spends most time



#### Social networks



**PERSONA 2**

Meet  
**JOEL**  
Single, Musician, 28 years old  
Johannesburg, SA



*"I want to find the right product for me."*

#### Goals

Search for information around a skin care product that removes acne. Concerned about how long it takes to remove acne breakout, the price of the product, saving info about his skin, prevent results and recommended products. Being a novice to skin care products he also wants to know how to use the product.

#### Hobbies



#### Spends most time



#### Social networks



**PERSONA 3**

Meet  
**SANDY**  
Single, Student, 19 years old  
Johannesburg, SA



*"My skin must look good for the school dance."*

#### Goals

To purchase an Environ product that fits her skin type. She is going to a school dance with an hot date and wants to look the best. Concerned about price and setting up an appointment.

#### Hobbies



#### Spends most time



#### Social networks



# Use Cases

- Document (1) how people will interact with a product or service and (2) determine requirements a product or service needs to satisfy the users
- It's a good idea to have a primary use case for each persona you create
- Helps prioritize items and establish a series of goals



# Use Cases

- Use Case # 1: Name
- Description (1-sentence)
- Users (personas)
- Preconditions (what happens before the use case)
- Basic Flow
- Alternative Paths
- Postconditions (what happens after the use case)

[Link](#)



# Use Cases

**Name**

**UC-8: Search and Replace**

---

**Summary**

All occurrences of a search term are replaced with replacement text.

---

[Link](#)



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## Rationale

While editing a document, many users find that there is text somewhere in the file being edited that needs to be replaced, but searching for it manually by looking through the entire document is time-consuming and ineffective. The search-and-replace function allows the user to find it automatically and replace it with specified text. Sometimes this term is repeated in many places and needs to be replaced. At other times, only the first occurrence should be replaced. The user may also wish to simply find the location of that text without replacing it.

[Link](#)

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# Use Cases

---

Users

All users

---

Preconditions

A document is loaded and being edited.

---

[Link](#)



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## Basic Course of Events

1. The user indicates that the software is to perform a search-and-replace in the document.
2. The software responds by requesting the search term and the replacement text.
3. The user inputs the search term and replacement text and indicates that all occurrences are to be replaced.
4. The software replaces all occurrences of the search term with the replacement text.

[Link](#)

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Alternative  
Paths

1. In Step 3, the user indicates that only the first occurrence is to be replaced. In this case, the software finds the first occurrence of the search term in the document being edited and replaces it with the replacement text. The postcondition state is identical, except only the first occurrence is replaced, and the replacement text is highlighted.
2. In Step 3, the user indicates that the software is only to search and not replace, and does not specify replacement text. In this case, the software highlights the first occurrence of the search term and the use case ends.
3. The user may decide to abort the search-and-replace operation at any time during Steps 1, 2, or 3. In this case, the software returns to the precondition state.

# Use Cases

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**Postconditions** All occurrences of the search term have been replaced with the replacement text.

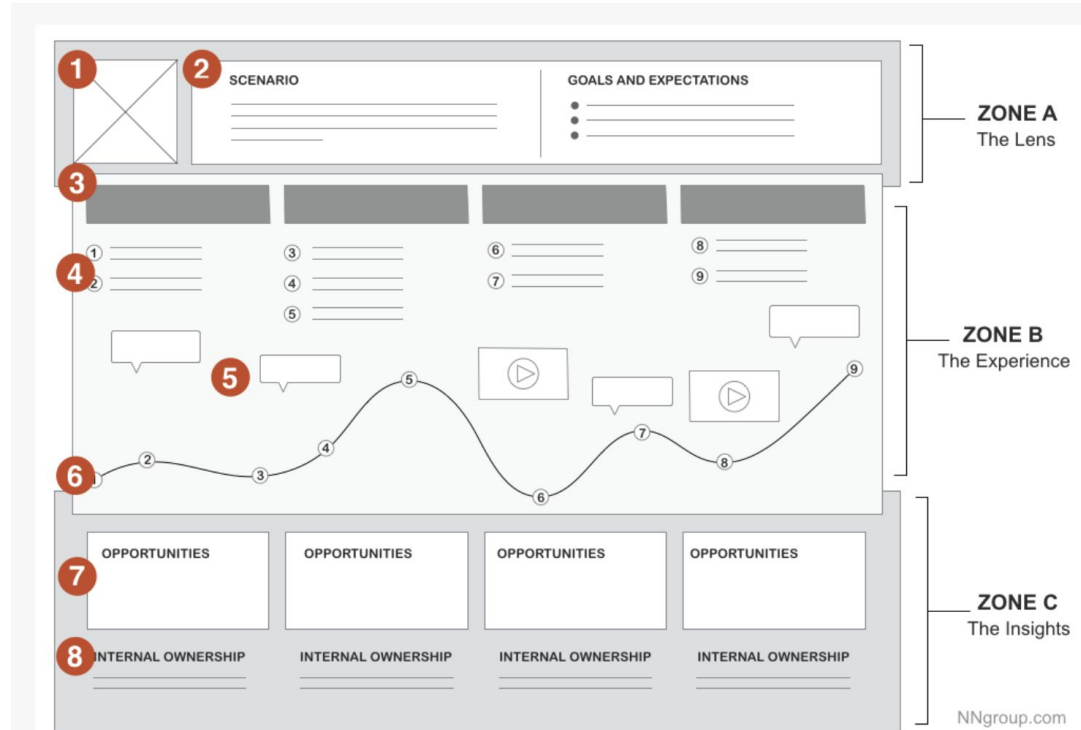
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# User Journey

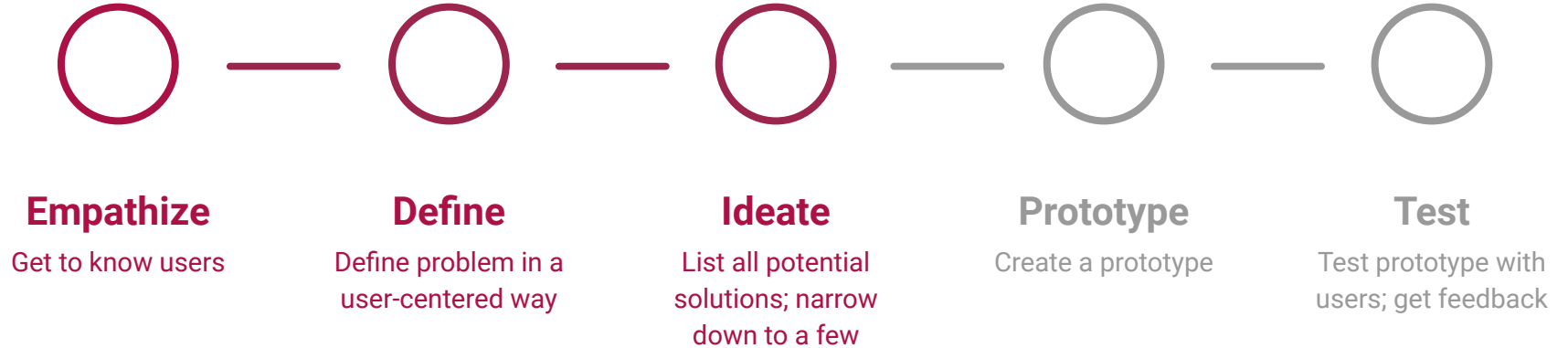
- Holistic view of the user's journey through using the product (touchpoints, channels)
- Actions, thoughts, emotions as the user goes through their product interaction
- Insights, pain points, opportunities, plans moving forward



# UX Research

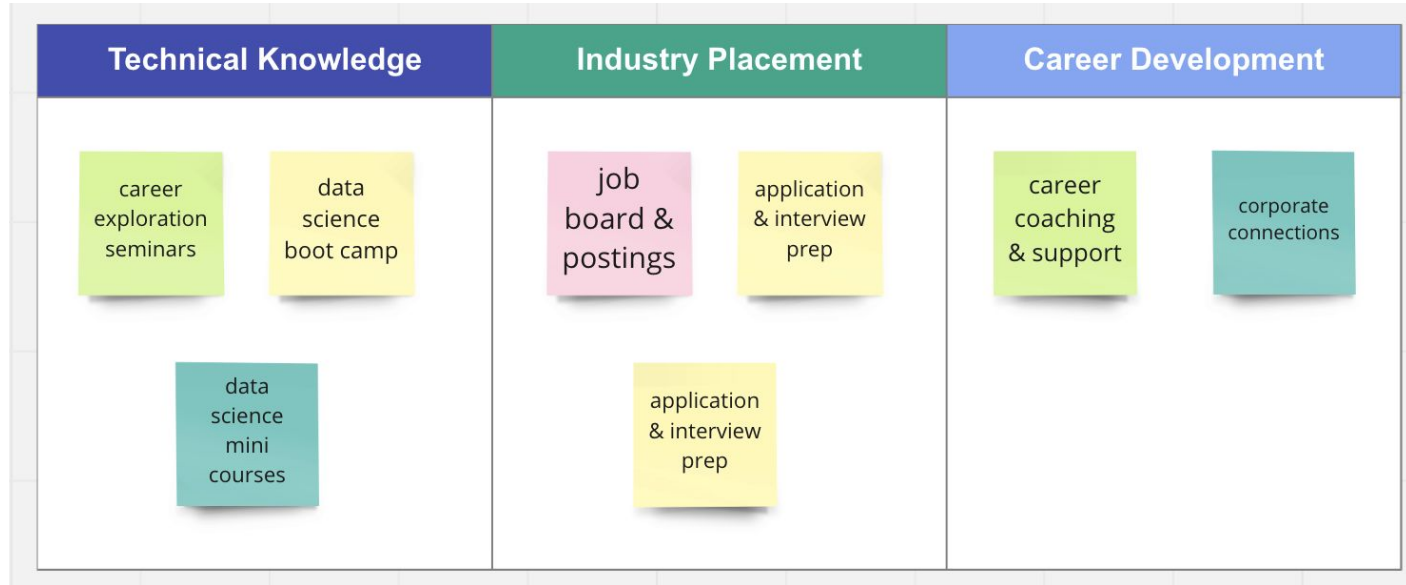
## Lesson 7: Product Design

# Design Thinking



# Ideating

- Miro is often used for online whiteboarding among many members

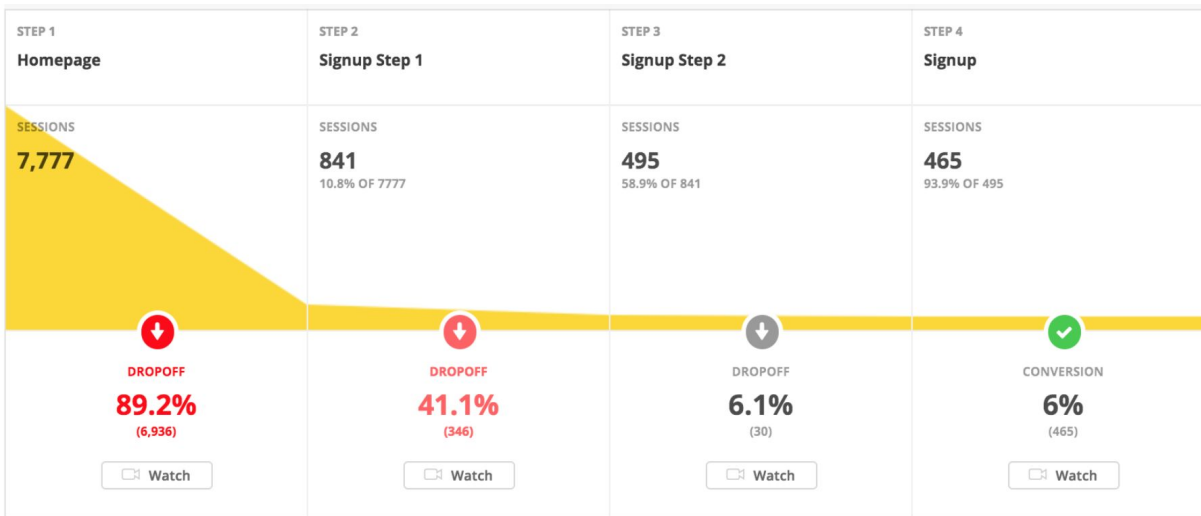




# Ideating

## Funnel Analysis

Which website page do we want to focus on?



# Ideating

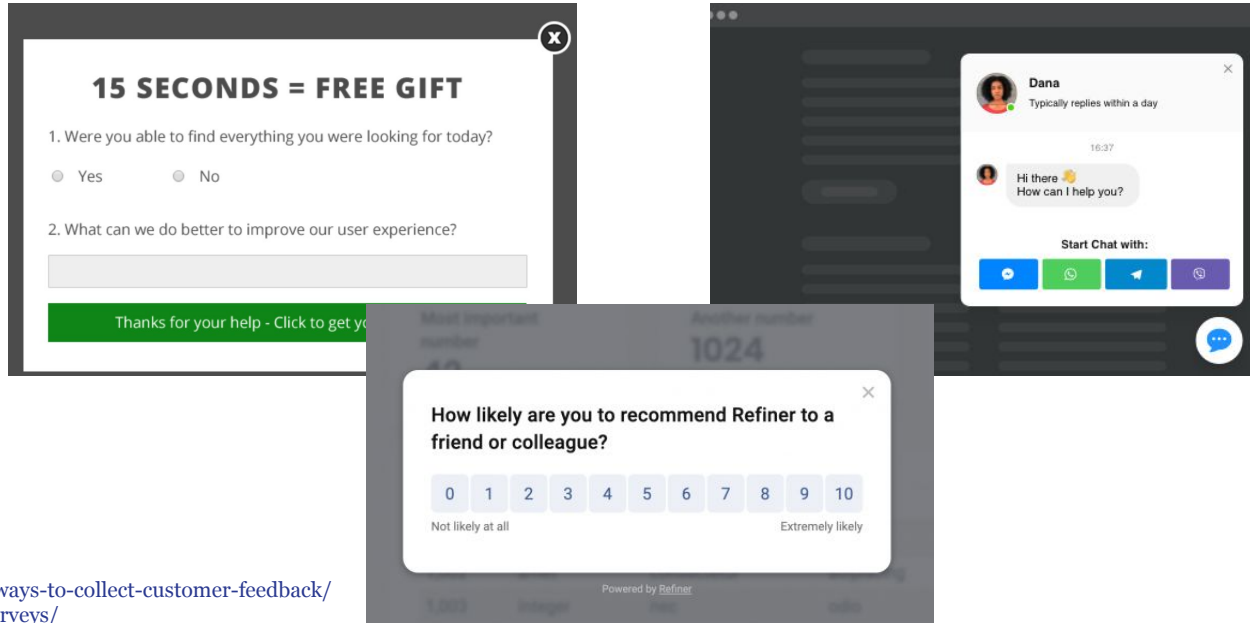
## Heatmap

Which features of that page do we want to focus on?



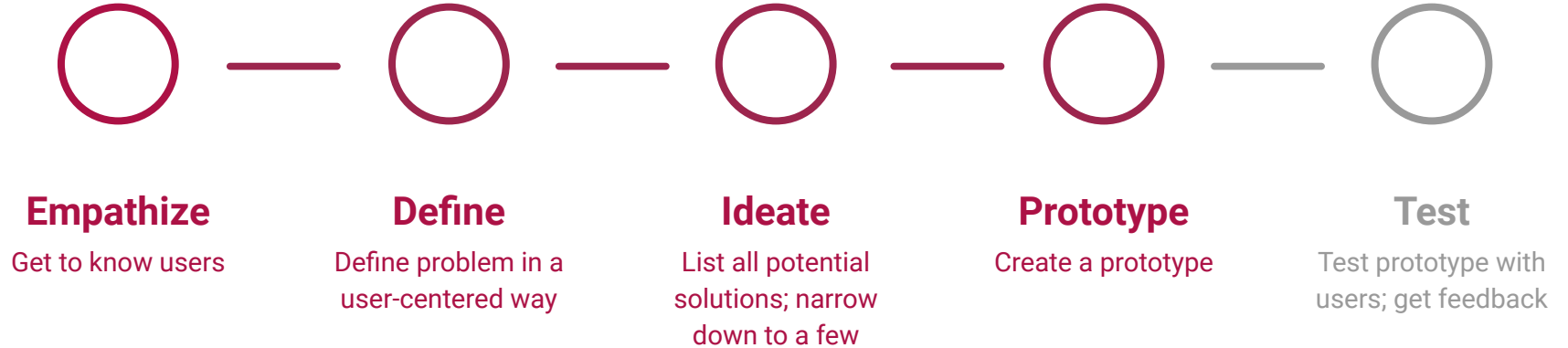
# Ideating

## User Feedback



<https://optinmonster.com/best-ways-to-collect-customer-feedback/>  
<https://refiner.io/blog/popup-surveys/>  
<https://elfsight.com/all-in-one-chat-widget/>

# Design Thinking



# Wireframing

- Show a product design at a structural level (usually for web / mobile apps)
- Should be tied to persona needs and user journeys
- Wireframing is done before a full scale prototype – it helps align all stakeholders around the product's scope and aims
- Can vary in **fidelity**
  - **Low fidelity** = a sketch of the final product that includes basic elements, but not much more
  - **High fidelity** = looks like the final product



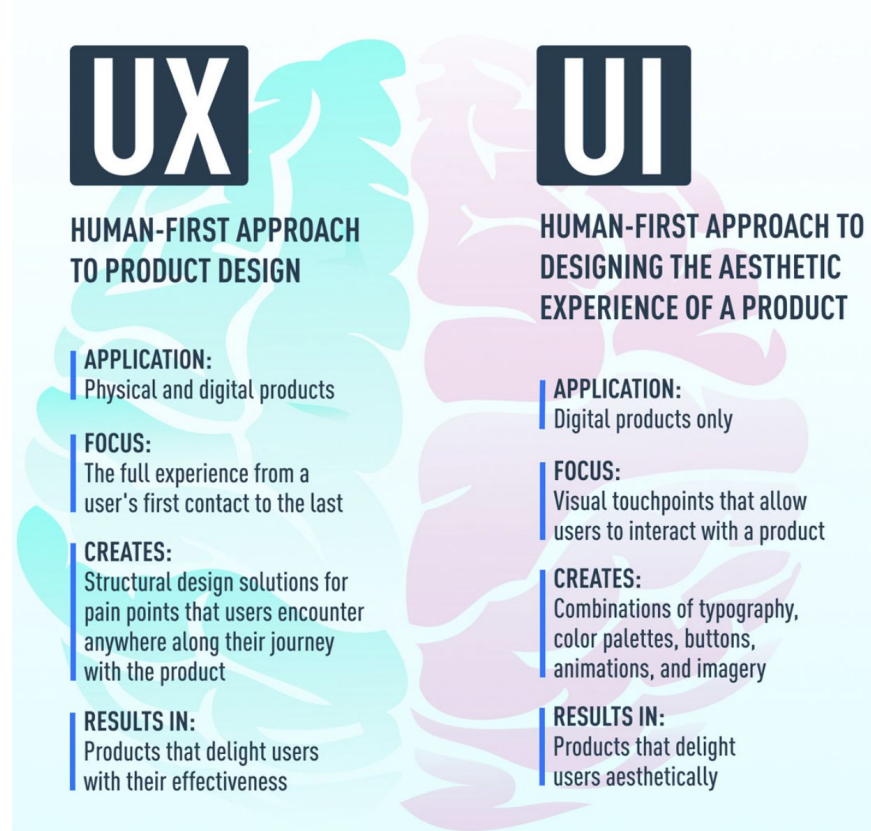
# Wireframing

*This brings up an important career note:*

**Many UX jobs are called UX/UI, for “User eXperience and User Interface”**

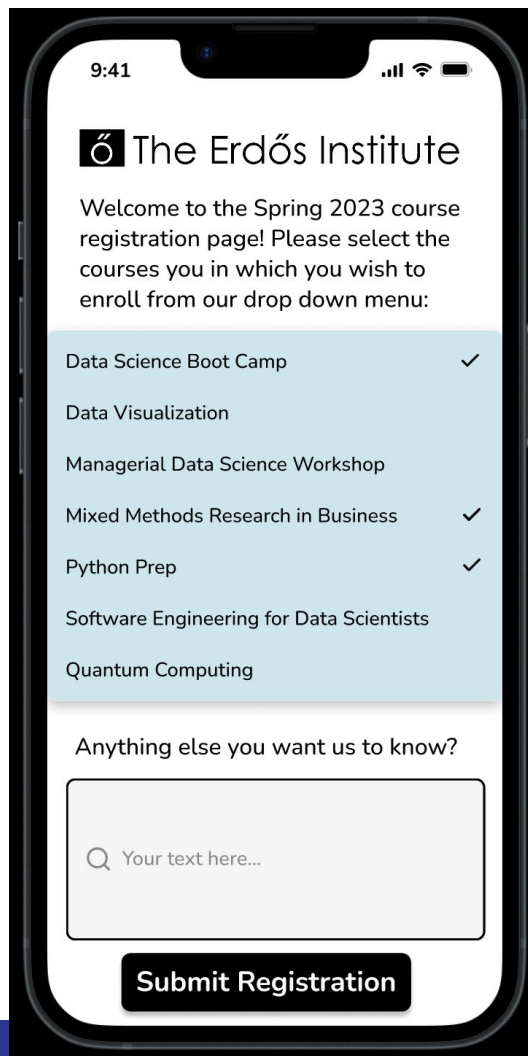
- The emphasis on UX vs UI will depend on each company.
- UI is only for digital products, whereas UX can be for physical or digital products.

[Link](#)

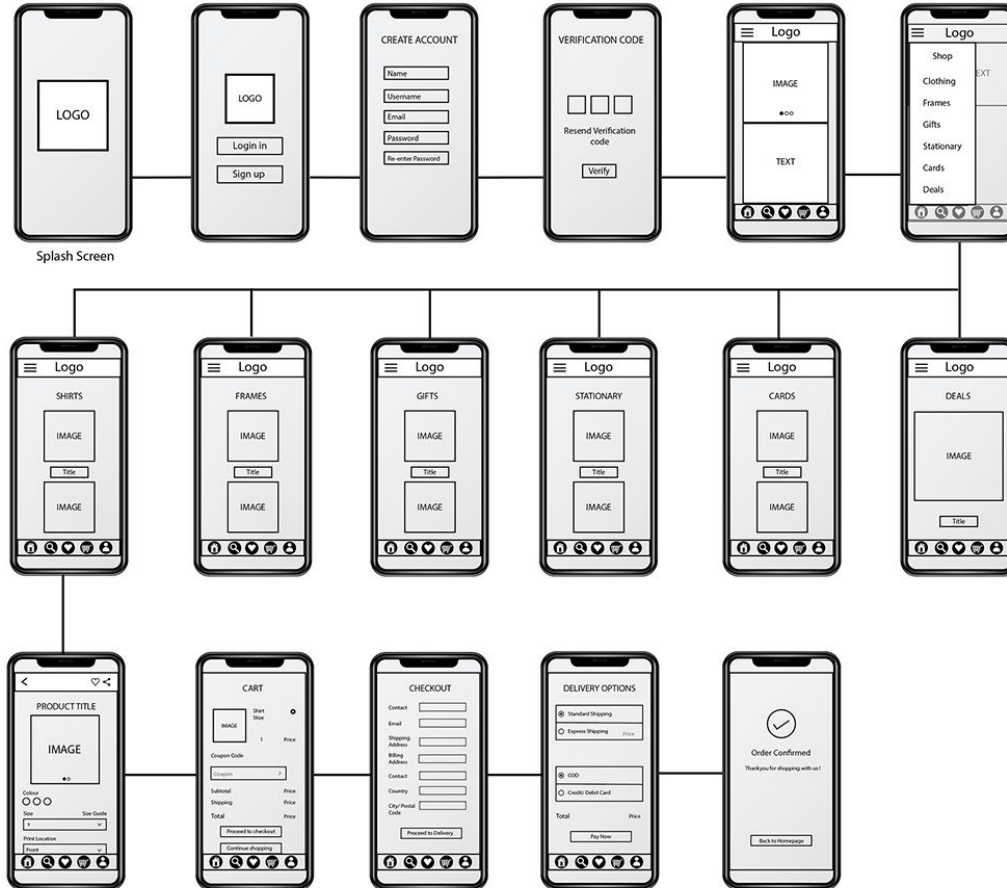


# Wireframing

- Figma is often used for creating design prototypes



# Wireframing




























# Storyboarding

- Series of drawing that take you through the customer's journey or interaction with the product
- Often used in advertising and marketing, but versions of storyboarding can also be used in UX/UI
- Includes scenarios, visuals, captions
- Want it to be memorable, engaging, and visually captivating



# Storyboarding

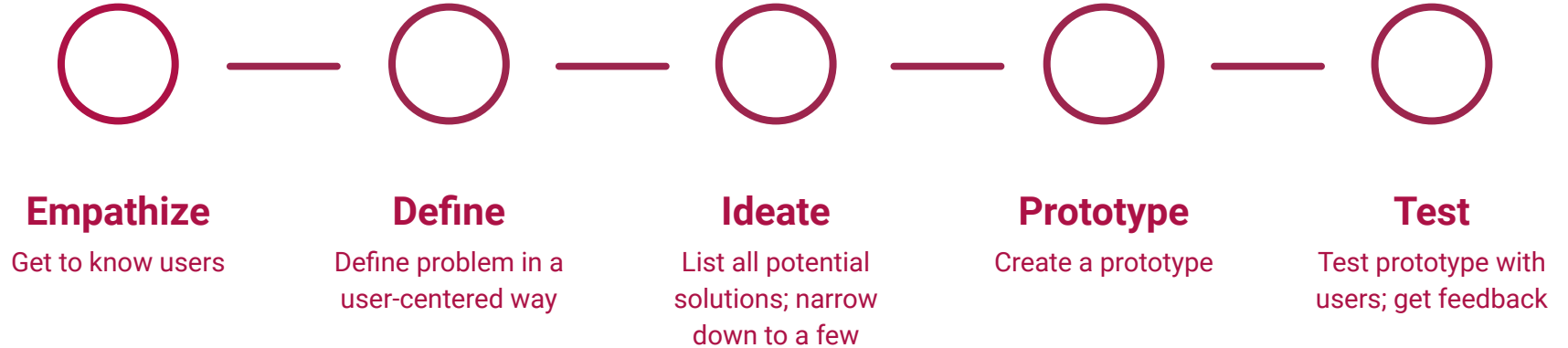
STAGE	DECISION TO START	DECIDE ON CHALLENGE	GROUP CREATION	1. RESEARCH	2. FEEL	3. IMAGINE	4. DO	5. SHARE																																																
DOING	 Start	 Search by Category  Pick a Challenge	 Set Group Name & Invite Friends	 Conduct Research  Fill out Question	 Define Stakeholders  Conduct Interviews  Create User Personas	 Create Ideas  Vote Best Ideas	 Define Needs and Obstacles  Create Action Plan	 Hold a Presentation  Share your Idea on Tima																																																
THINK	„Design Thinking sounds interesting!“ „I'm interested in how to learn by real projects.“ „I want to change something in my environment or a problem of mine.“ „The teacher gave me the task to use this website... hopefully not another lame lesson.“ „I want to get a certificate for it.“	„I don't know what challenge to choose.“ „Why should this matter to me?“ „These problems sound hard to solve.“ „Nice, I know the organization that put this challenge up!“ „I'd like to have a coach.“ „Aah this problem sounds familiar to me!“	„Yeah, I'll invite my best friends!“ „I'm glad I don't have to do this alone!“ „Mmhhm how to name our group? Something goofy should do it haha!“ „Dang, my friends don't know their email-addresses... can I add them later?“	„I don't know where to look this up.“ „I feel a little lost - I don't want to read so much about this.“ „I would like it better to get all this information in the app.“ „Oh, didn't know this topic is so diverse!“	„To think about all the stakeholders and their needs is a new but interesting concept to me.“ „Did I miss one?“ „It's challenging to think about all their characteristics.“ „Haha I love to create the avatars!“ „The interviews gave us good insights.“ „Nice to know for whom we do this.“	„It's fun to create crazy ideas.“ „I'm a little insecure. I don't want my team to laugh about my ideas.“	„This is too much writing, can't I just go out and test?“	„Nice to get so much online feedback.“ „I'm a little insecure with holding presentations in front of my class.“																																																
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NOTES	-	It could be nice to set general interests first - or organizations the student is interested in.  Organizations may put up a coach / person that mentors this problem.	Results of every upcoming section are summarized for overview, sharing & print.	<b>Individual Tasks:</b> - Why and how did the problem occur? - Guide on how to conduct research - What tools or methods do the stakeholder currently use to handle the problem? - Did someone try to solve this already? Are they successful / why (not)?  It would be super nice if those who put in the challenge could also provide some basic informations so students don't feel lost.	<b>Individual Tasks:</b> - Explanation Video - Quiz to test understanding - Create User Personas - Explanation Video - Quiz to test understanding Optional: Conduct Interviews Define stakeholders (Name, Age, Job, Environment, Goals, Needs, Frustrations) - Avatar Creator  Finished User Personas will be accessible from now on (toolbar).	<b>Individual Tasks:</b> - Explanation video - Quiz - Idea Creating (quantity) - Evaluate Ideas (quality)  Idea Generation via random topics (associations), clicking-questions or birkenbishi kama drawing, etc.	<b>Individual Tasks:</b> - Explanation Video - Quiz - What do we need to test our idea? - From where do we get it? - Define Obstacles - If Then Plan - Set responsibilities - Test it! (WOOP Method)	<b>Individual Tasks:</b> - Share idea (social media) - Presentation in class - Evaluation  If you like, record your presentation to share it, too.																																																

# Rapid Prototyping

- Strategy that aims to create multiple prototypes very quickly
- Lets you innovate, design, and test multiple versions of a product
- Allows you to see how people react to your products and take their feedback into consideration before you have sunk too much time and money into a design that may not work



# Design Thinking



# Test

- Can repeat interviews or focus groups
- Conduct surveys (next lesson)
- Analyze data (following two lessons)



# User eXperience (UX)

**User Experience Research** focuses on the study of end users: the people actually using your product

- Analyzing the behaviors, requirements, and expectations of end users
- Focuses on a specific product or service
- Often digital products, such as apps or websites

The goal of UX is to **improve end user experience through the interaction with a product**

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