



Using Personas Effectively

3. Persona Theory



How do Personas Work?

Any psychopaths in the room?

If so would you please leave now.

Most people are very good at reading the emotional state of others. This skill is part of **empathy** - being able to understand the internal state of other people.

Personas piggy-back on that skill, and use it to **guide design**.

By creating a fictional character, rather than just listing traits the designer can use their **emotional** as well as rational **intelligence** to help guide the design.



How do Personas work?

During the research phase, you learn about how the target audience tick.

The Persona is essentially a summary of your now extended understanding of the specific population.

It acts as an **empathic trigger**. By creating the Persona in human form you're using your innate empathic abilities.

If you summarised your findings in a more statistical manner, your emotional awareness would not be engaged, losing some of the "soft" data you collected.

This "soft" data is extremely hard to communicate - it's felt, and it's hard to convey a feeling accurately in words.



empathy | 'empəθē | ,empəθi | ,empəθi |

noun

the ability to understand and share the feelings of another.

DERIVATIVES

empathetic | ,empə'θetik | | 'empə,θɛdɪk | | -,θɛtɪk | adjective

empathetically | ,empə'θetik(ə)lē | | 'empə,θɛdək(ə)li | | -,θɛtɪk(ə)li | adverb

empathic | em'paθɪk | | əm,pəθɪk | | ɛm,pəθɪk | | ɛm,paθɪk | adjective

empathically | em'paθɪk(ə)lē | | əm,pəθək(ə)li | | ɛm,pəθək(ə)li | | ɛm,paθ- | adverb

ORIGIN early 20th cent.: from Greek *empathēia* (from *em-* 'in' + *pathos feeling*') translating German *Einführung*.



How does empathy work?

Intra-personal skill (self-knowledge) is important.

Mostly we understand other people by assuming they are the same as us.

So if we understand our own reactions to things, we can estimate how others might feel in a similar situation.

However, this is not entirely true!

Life experience teaches us that other people are not exactly like us. The more people we encounter, the richer our **inter-personal skills** (understanding others) become.

This is why user research is important, so find where other people differ from ourselves.



Empathic Distance

How different is someone from yourself? The more different they are the harder it is to empathise with them. This is the empathic distance.

Empathy is not **Sympathy**.

You can empathise with someone without feeling any sympathy.

Eg. You can study and understand what makes a terrorist do what they do (empathy), without agreeing or condoning it.

To understand someone else, start assuming similarity, and then make a series of adjustments.



The Peninsular War 1808-1814

When Napoleon lead his armies across Spain to invade Portugal in 1807 they got the supplies they needed by force, from the Spanish.

He then deposed the Spanish king, placing his brother on the throne.

The Spanish, not surprisingly, objected.

When the British, under Viscount Wellington, counter attacked in 1809, they bought all their supplies. This endeared them to the Spanish.

Wellington's ability to empathise with the situation of the Spanish peasants gave him a substantial military advantage - hearts and minds. Something Napoleon was largely incapable of.



Method Acting

The skills involved in using a Persona are not dissimilar to **Method Acting**.

Actors using the method try to understand the actions of the character they portray by understanding their emotional state, frequently drawing on their own emotional experiences.

They also commonly do **character research** in preparation for taking on a role.

While designers don't need to perform (although some do!) the understanding, and learning to put oneself into another's shoes is similar.



When do Personas fail?

Persona overload

Empathic over-stretch

Too little research



Persona Overload

Using a Persona require some degree of "getting into character".

The more Personas you try to use within a short space of time the harder it becomes to get into (and stay in) character.

Instead they start to blur together.

This is why you complete a design using the Primary Persona first. Only then do you refer to the secondaries.

Having too many secondaries also makes this harder. It's unwise to attempt to use more than two secondaries in addition to the primary for any given project.

If you feel you need more, it *may* suggest you should have multiple products.



Empathic over-stretch

Getting into character when that character is a London based estate agent isn't too bad.

Getting into character when they are a Peruvian weaver is going to be somewhat harder.

The less you know about the Persona the harder it is to empathise accurately. It's unwise to develop Personas for foreign cultures without someone from that culture as part of the team.

Without real cultural experience what may feel convincing to you, is probably quite wide from the mark for them.



Too little research

The amount of research you need to do is dependent on the empathic distance between you and population you're trying to derive a Persona for.

If you do too little, you won't have built up the necessary understanding of the population. While the Persona may function as an empathic trigger, there simply won't be much worth triggering.

This is also why the designer must do the user research. If they don't they may have the trigger, but they don't have the deep understanding - so its value is largely lost.



Reusing Personas

Don't!

Personas are somewhat expensive to create (especially when done properly), so it's tempting to reduce the cost by reuse.

But Personas are best used by the people who made them, which greatly limits the scope for reuse.

Personas are also often very project specific. During the research phase you're learning about behaviour in a confined context.

It's therefore unlikely that the knowledge represented by the Persona will be useful for the next project.



Getting round Persona overload

Very few people can use many personas in short order.

The best option is avoid the problem altogether.

Either merge Personas who only differ in small ways. (You should actually create a new Persona which lies somewhere between the original two - there's nothing more confusing than changing a Persona).

Or split the product. If you have many personas it could suggest you should have many products. If that's the case then each design project will deal with one Persona in turn - avoiding overload.



Reducing Empathic Distance

More precisely, empathic distance is the gap between your ability to understand another person, and that person themselves.

So to reduce that gap you need to improve your understanding.

Tools like pregnancy simulators for expectant father do essentially the same thing - they try to improve understanding - and thereby improve empathy.

Immersing yourself in the user community can also help. The more contact you have the better your chance of understanding. This pushes you more in the direction of ethnographic studies.

Having designers specialise in particular domains can make the huge investment in ethnographic studies more reasonable.



Questions

<http://www.surfaceeffect.com/services/training/upe/>