



Eliminate Rework & Understand Your Users with Personas

Activity Led by:

Cody Backhaus

*Senior Software Engineer & UI/UX Generalist
Heartland Business Systems*

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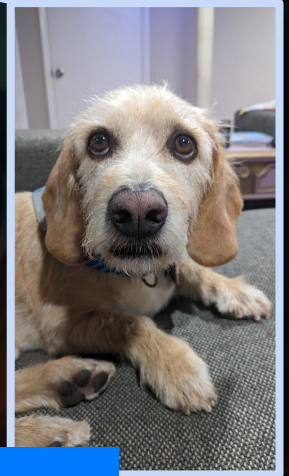
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Who am I?

Cody Backhaus

- I work for Heartland Business Systems (HBS) (5 years)
- In the industry for 12+ years, full stack developer, websites and mobile apps, graphic design, passionate about user interfaces and experiences.
- Wisconsin Native; Live in Green Bay, with my wife and three kids (one more on the way), and dog
- I love DIY projects, games, tinkering, smart home things, traveling, cooking, art, and probably everything else



What a persona *IS*

Personas are fictional users based on real data. A persona's goals and characteristics represent a user of your application.

What a persona *ISN'T*

Personas are not assumptions or theoretical users. They aren't generic or a catch-all for a group of users.

Why do I need personas?

- Connect with your users (empathize, understand)
- Shift user needs from assumptions/theories to real user problems
- Enable your teams to have informed conversations and make decisions with clarity
- Prioritize your bugs, features, and backlog and make sure your team is focusing on the right things



Personas for Designers

- Stop designing for ourselves/themselves
- Create based on what's needed of their users instead of focusing on irrelevant details
- Build relationships with their user base

***Eliminate
Rework!***

Personas for Developers

- Understand user stories and tasks before development starts
- Make sure you're solving for a real use case
- Focus their build by adding a real-world consideration to the conversation

***Eliminate
Rework!***

Personas for Everyone Else

HOT TAKE:

Everyone in your organization should be considering personas!

- Alignment of Sales → Accounting → Customer Support and beyond
- The organization should have an understanding of who they're trying to serve
- Helps your team understand how to support the end user

Where do I start?

Define your research goals. Become Empathetic.

- What do you want to know about your users?
- What current experiences do my users have using my application?
- What emotions come up when someone uses my software?
- Do my users have a history of using an application like this?

Next, collect usage data and write create interview questions.

Great... how do I do that?

Think about your goals and select the right tools to collect information from users. Use platforms that make surveys easy, conduct user interviews, and capture usage analytics. Build and leverage your community. Ask simple, open-ended questions.

Surveys

Statistical Analysis

Analytics

Focus Groups

User Interviews

Product Testing

Observation

Social Media

Interview/Survey Questions you could ask:

- Can you explain what a day in your role may look like?
- What skills do you need to do your job?
- How long have you been working in this role?
- How do you measure progress or success?
- How do you feel when you do [task]?
- What challenges do you run into when doing [task]?
- What devices do you rely on the most to do your job?
- Are there other applications that you enjoy using to do [task]?

Analyze Your Data

Group your usage data into buckets.

You may export your data (into CSVs, maybe you're bringing it into a CRM) and make sense of it.

- Use a tool that you already have to preserve this data in one spot
- Create a report from a data collection tool to find common themes, trends, and patterns
- Call on your Excel expert-friends

Build Your Personas

Group your data into buckets.

You may export your data (into CSVs, maybe you're bringing it into a CRM) and make sense of it.

- Create 3-8 Personas
- Try to include: demographic, psyche, background, and emotions they may have
- Use a template

Build Your Personas

Basic information



Name

"Archetype"

- Age
- Occupation
- Location
- More info
- More info

Bio

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LINK 1

LINK 2

LINK 3

Personality

Introvert Extrovert

Analytical Creative

Busy Time rich

Messy Organized

Independent Team player

Passive Active

Safe Risky

More about [Name]

Interests



Influences



Goals



Needs and expectations



Motivations



Pain points and frustrations



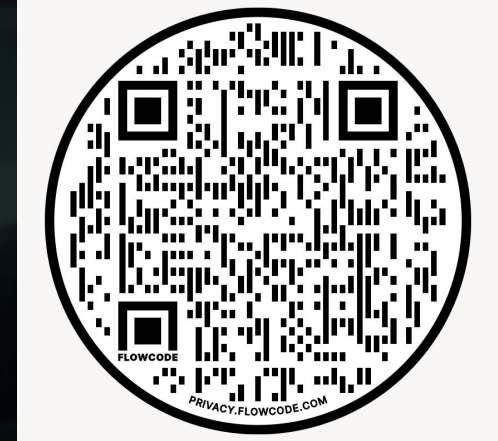
Templates



**Figjam (Figma)
Template**



**Justinmind
Templates**



**Hubspot Persona
Builder**

What's next?

- Prepare real scenarios for your user - this helps tell a story
- Share your personas with your entire company
 - Helps unify the company/vision
- Continue research, adjusting your personas and adding more personas to gain more understanding about your user base
 - Regroup with your interviewees
 - Ask new questions, lean on your users to show you their issues, not just explain them

More Reading:

Interaction Design Foundation

<https://www.interaction-design.org/literature/topics/personas>

Usability.gov

<https://www.usability.gov/how-to-and-tools/methods/personas.html>

Let's Connect!

LinkedIn: <https://www.linkedin.com/in/codybackhaus/>

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