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▶ **To cite this version:**

Lene Nielsen, Kira Storgaard Nielsen, Jan Stage, Jane Billestrup. Going Global with Personas. 14th International Conference on Human-Computer Interaction (INTERACT), Sep 2013, Cape Town, South Africa. pp.350-357, 10.1007/978-3-642-40498-6_27 . hal-01510516

HAL Id: hal-01510516

https://inria.hal.science/hal-01510516

Submitted on 19 Apr 2017

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Going Global With Personas

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Abstract. The persona method is widely used and commonly described both in scientific literature and in case-based blogs. Most often the descriptions point to a local context with local user groups and it is difficult to find writings on use of the method in an international context and in globally distributed teams. This paper reports from a qualitative study conducted in 2012/13 within 13 Danish companies and points to how design teams apply several different strategies when end-users are distributed worldwide. Moreover it shows how the designers value the strength of the method to provide common grounds for the team, especially for team distributed across countries.
Keywords: personas, scenarios, cross culture, international, design.

1 Introduction

Personas are descriptions of fictitious users and it is recommended that they get constructed from different forms of field data [1], such as surveys, user interviews, observations, and a combination hereof. The method enables empathy and engagement in the end-users [2] and helps designers to imagine the persona in a future use situation. Personas are used for different design activities that are typically explored in stories – scenarios - that describe future possibilities in an easily accessible way and in a format that is easy to change. The persona method has developed from being a method for IT system development to being applied in many other contexts, including development of products, marketing, communication planning, and service design.

The persona descriptions have over the years developed a set layout. The persona has a name, the description is most often 1-2 pages long, and has several subsections that describe the persona's characteristics, life, behaviors, and preferences. Most often a photo accompanies the description [3].

The perceived benefits of personas for design range from increasing the focus on users and their needs, being an effective communication tool, to having direct design influence, such as leading to better design decisions and defining the product's feature set [4-9]. The method is criticized for: being too founded on qualitative data and non-scientific, being difficult to implement, not being able to describe actual people as it only describes characteristics, and for preventing designers meeting actual users [1].

Despite criticism the common perceived benefits are two-fold: when designing products the method facilitates that designers remember that they differ from the end-

users, and that the method enables designers to envision the end-user's needs and wants. Furthermore the method creates empathic understandings of users and breaks the designers' automated perceptions of end-users, which are grounded in individual experiences and not in data. Finally the persona method supports a common and aligned understanding of the end-users that is shared among project teams.

Fig 1: An example of a typical persona description from The Danish Tax Authorities - Skat.dk. In this example the borders are color coded in order to heighten the perception of differences among the compilation of personas.

Most persona descriptions are to be used for country specific projects, but international companies also use the method in projects that are aimed at an international audience and used by globally distributed design teams. In this paper we investigate the strategies applied when Danish companies develop personas for an international audience, the outcomes, and the perceived benefits and difficulties.

Creating personas for an international audience is not well described in the literature. Putnam et. al. [10] describes two cases of conveying data for personas from Kyrgyzstan and the Andhra Pradesh region of India and the strategies they employed for the persona descriptions that were to be used by designers, developers, and other stakeholders not from these regions. One of the strategies was to use scenarios in the persona descriptions to convey cultural and lifestyle differences.

Snyder et. al. [11] describe a case where they discussed three approaches to integrating cultural differences into persona descriptions: 1) A separate persona for each culture and for each task. 2) U.S. based persona descriptions, each including sections with cultural differences. 3) One persona from each country visited, with the cultural differences as part of the descriptions. In this case the team realized that there were

few cultural differences. They ended up with persona descriptions from several countries as a reminder to the team that the product is used in different countries and cultures.

Finally we identified a case description by Windows International Program Manager's team in Pruitt and Adlin [9] where the team identified personas for each ethnographic region and used a scoring on how different these were on selected parameters from the US personas. The team then defined the differences in the persona descriptions in accordance to US.

2 The study

This paper reports from a qualitative study with 28 participants from 13 Danish companies that are experiences in using the persona method. Their experiences range from 6 month to more than 10 years. The study took place from October 2012 to January 2013. The study focuses on the companies' use of the persona method. The interviews are analyzed for statements on cross-cultural issues such as international personas that cover several nationalities and the use of the method in globally distributed design teams.

2.1 Finding the companies

In order to find the companies that have experience in using personas we used different online channels such as: personas.dk, Infinit.dk and Linkedin groups such as User Centric Network, Service Design in Denmark, and Sigchi.dk, we advertised for companies in two news letters respectively from Infinit and Sigchi.dk, and used word of mouth.

To broaden the perspective and get companies outside of our own network companies were found by search on keywords such as: personas and usability.

The intention was to cover public and private institutions, as well as large, middle-sized and small companies.

In the end we did interviews at public institutions: Danish Broadcast, The Royal Danish Library, The Danish Tax Authorities, Aarhus Libraries. Large private companies: Danske Bank, Microsoft Solutions, Safecom, and Widex. Middle sized private companies: Mjølner Informatics, AdviceDigital. And small private companies: Centre for Digital Pedagogy, Value-Creating Construction, and The Food Culture Zone.

2.2 Method of analysis

The participants were asked to describe their processes of work: how they collect and use data, and how they design and use the personas.

In line with Kvale's [12] advice to start the analysis already when interviewing we began identifying the recurring issues of working with personas in a global setting already in the interview situations. Furthermore we recorded the interviews in the audio transcription tool F4 and while listening to the interviews, passages focusing on

use of personas in an international or global perspective, were identified through the method of condensation [12]. The condensed transcripts have been analyzed, first for statements on use and use situations, secondly for statements on global issues.

Then the statements were mapped into categories, in order to identify which benefits, challenges, and problems the companies face when using personas within an international setting. Moreover which strategies they use to overcome the challenges.

As this study is part of a larger project about the use of personas in general, it has been possible in all phases of the analysis to compare the national and international perspective thus to identify the additional problems and benefits of the method when companies face an international user group.

3 Findings

3.1 The value of personas

In general the benefits of using personas for design are viewed from a strategic level and with a production perspective.

> C11: "We are still quite technically oriented and quite nerdy when we develop things. And now it's the customer's needs that are described first. I'm not saying this happens in all the cases, but it is a step towards it. This is totally different from what we did before. And personas has helped to understand what kind of needs it is you have to cover."

On a strategic level the benefits are:

- It provides guidance in the development process as it enables a focus on user needs instead of project participants' likings.
- The focus on user needs improves the definition of the project.
- In the decision making process the scenarios creates a clear understanding of what the users need and what goals the company wants to achieve.
- In the discussions the project participants' implicit understandings becomes explicit.
- A participant from IT consultancy mentions that they use the method to confront their clients with their lack of visions.

From a production perspective the benefits are:

- When working agile it helps prioritizing user stories[1].
- The method creates an understanding of how the product creates value for the end-users.
- The personas are used to create use cases and scenarios.

[1] User stories are short descriptions of functionalities [13].

3.2 The value of persona in an international perspective

The benefits of the method are perceived as being even bigger in the companies with a global audience and globally distributed project teams. The perceived values of the persona method are several. One benefit of the method mentioned by all participants is its ability to create a common language and a shared understanding of who the users are.

> C12: “One thing is for sure, it has provided a common language. It might sound a bit like a cliché, but it really is a common language. I get quite warm at heart when you sit in a meeting where you hardly know anybody, and then somebody says: "Well, would Alex think like this?" Then we all know whom we're talking about, we know the audience, and whom we address - just because of the name. It is a common language and I think it is enormously important – this goes across our department and reaches out to our subsidiary companies."

For large corporations the benefits are twofold: a shared language to discuss and talk about users that are nationally and culturally diverse, and a shared understanding across departments and national borders.

3.3 Data

The participants from companies that have an international audience describe it as especially challenging to get enough data and to know when there is enough data. They try to solve this by collecting data from different parts of the world, but none of the participants have data from all of the markets they address. Thus the major challenges become to get enough data, to get the right data, and to know when there is enough data to cover all the important aspects.

In particular it is mentioned that there is a difference making personas for a Western context and an Asian. Data on Asian users are hard to come by as this knowledge is not easy accessible and it is expensive to get data from countries were the Danish companies do not have any offices. Furthermore, from a Danish perspective, it is experienced that the cultural differences between the Danish and the Asian users are larger than those between Danish and European users. This in common makes it difficult to develop personas for Asian users.

3.4 Persona descriptions

The companies who have users from different countries experience it as especially challenging to create persona descriptions. They often look at specific national differences that are connected to:

- IT knowledge and use,
- Internet access,
- Language skills,

- Level of education,
- Different levels of autonomy in the companies and how management is distributed.

3.5 Strategies for the descriptions

There are mainly two strategies to address the challenges of a global target group: One strategy is to develop persona descriptions that represent users from different countries (e.g. one Finnish, one Polish, etc.), sometimes with the additional information that some personas may be more prevalent in some regions than in others. Another strategy is to have descriptions that are so general that they can fit a wide variety of countries. Finally some companies try to combine the two strategies, by dividing the persona descriptions into an overall part and a part that singles out national differences. In the descriptions the global perspective can be observed in both naming and the connected images.

> C8: "She is from Frankfurt, one is from Poland and one is from Norway. [...] We have just said to ourselves in order to create a broad representation of users and contacts we must have some personas from around the world. Whereupon we asked the question to our reference group: "Do we need personas from around the world?" They certainly thought so. They said it makes good sense as we sell worldwide. [...] It is not randomly selected countries, they are chosen to represent several countries."

3.6 Strategies for naming

Names are internationalized to cover a broad international group. There seems to be a common understanding that if the name is English; such as Anna, Elizabeth, or Robert, it can refer to any culture or nationality, regardless of an Eastern or Western context. When using the strategy of heightening the national awareness the personas are given specific national names, in order for the reader to deduce the nationality from the name, e.g. a concrete Finnish name such as Pekka.

3.7 Strategies for images

As with the names the images that accompany the persona description follow the strategies either to point to a specific nationality or to suppress identification of a specific nationality. For the first strategy the photos represent different types, e.g. Asians, Africans, and Europeans. In order to suppress national characteristics the persona illustrations are typically of Western appearance, or they are intentionally blurred or drawings with no national and typological characteristics.

One company chose to not have illustrations at all. According to the participants the company had discussed and agreed upon that a photo of a person from a specific country would hinder empathy and create a distance to the persona, if the project member were not from the same country. The same company had interestingly

enough decided to create personas where the name and the description had specific national characteristics. They did however not consider that a text would hinder empathy in the way that a photo will.

3.8 Lack of experience

Based on internal considerations and discussions each company develops their own strategy, but does not have any research on if and why the strategy works. They are aware of the fact that they lack evidence of the usefulness of the applied strategy both from company cases and research.

4 Conclusion

There is no doubt that companies with diverse international customers and companies with globally distributed teams perceive the use of personas as beneficial. The experienced benefits are larger than when the companies operate solely in a national context.

The benefits are two-fold: as a common point of reference for the many different departments and as a common understanding of the diverse user groups. For the last mentioned benefit the method furthermore prevents project participants to use own local experiences on the international audience.

In line with the sparse literature we saw several strategies applied in the descriptions 1) to create descriptions that could fit all nationalities (read: Western cultures) 2) to create country specific descriptions, 3) to create descriptions that fit all nationalities, but with additional culture specific information.

Even though the companies perceive personas for an international audience as beneficial, the described strategies hold difficulties. The strategy to create descriptions that fit all might result in superficial descriptions, this both because of sparse knowledge of all international user groups and the attempt to converse the diversity in the user groups. When coupling nationality with persona description the risk is that the focus on nationality might not be comprehensive and the differences among the personas are perceived as national, even though the differences might lie elsewhere. For the strategy of creating descriptions that fit all, but with additional culture specific information, the descriptions run the risk of being very long and confusing.

We found that there are great benefits of the persona method, but the understanding of the different strategies applied still needs to be investigated further.

The sparse literature on cross-cultural personas is of no help, it deals with communication of different national user groups to designers that might be distant from the end-users, but none includes distributed design teams in the studies. Proctor et. al. [14] propose to look into the cross-cultural decision-making processes in the phases of design, adoption, use, and support. In line with this and to support the companies we need to further investigate: how data can be efficiently gathered and analyzed for cross-cultural personas and we need to look at how they are perceived and used in

globally distributed teams. Finally we need to develop different methods to describe international personas.

Acknowledgement

We wish to thank Infinit for supporting the research.

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