

# PERSONAS - FROM POSTERS TO PERFORMANCE

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## ABSTRACT

The method of personas is gaining widespread use, not only within IT systems development, but also in areas such as architecture, marketing, and product development. Personas are descriptions of fictitious users derived from on qualitative and/or quantitative data. The persona method helps designers and design teams to engage in the users during the entire design process and to focus the design on the user (Nielsen 2012). The method was introduced in the late 1990s, but develops constantly. A survey of how personas are used in Danish companies, performed in November 2012 and running into January 2013, shows that more companies now communicate personas through role-playing instances (using e.g. masks and scenes) besides communication via posters. Furthermore designers' perform user journeys using personas.

## INTRODUCTION

This paper reports from a research project that looks into how the method of personas is used in commercial settings, the benefits and pitfalls of the method, and the different forms of communication and use. During winter 2012/13, 13 Danish companies were interviewed and one of the findings is that companies use personas in activities of performance. This paper focuses on these activities, the way they are carried out, and the reasons for using performance.

## PERSONAS, SCENARIOS, STORIES

Persona descriptions are static, but ideas for design and interactions come to light in narrative scenarios. Scenarios have a strong narrative structure and investigate goals, interactions, and contexts (Nielsen, 2012). Similarly requirements can be described in narrative scenarios that are easy to relate to and easy to remember. The scenarios draw on our ability to create meaning individually and together, and to arrange and concentrate information in a narrative form (Carroll, 2000). As such personas and scenarios are tightly interlinked with storytelling and its ability to evoke empathy and identification, this concerning both the relationship between the story and the characters as well as the general narrative structure.

Within scenario-based design role-play has been used directly in the design process to gather requirements using both trained actors and designers (Newell et.al. 2006, Howard et.al. 2002).

## PERFORMANCE IN DESIGN

Theatre techniques and theatre as metaphor for understanding design practice has been extensively used as part of design practice (Medler & Magerko, 2010). Theatre and acting are used as metaphors for design practices as seen in this description of co-design "(...) understanding performance as situated events, ritual, play, liminal periods and frames shed important light on also understanding co-designing as performing." (Eriksen 2012, pp. 298). Here the stage is perceived as the interchanges happening between design events and explorations. In this paper we make a distinction between 1) theatre as metaphor for design practices and 2) theatre techniques and methods for acting used in product design processes, this include story-development, dramatic instances, characters, and goals as specific areas of *theatre play-writing* and *scenic play-acting*. In this paper we focus on the concrete understanding of theatrics methods as the specific elements of acting appeared in the analysis of the interviews.

In design processes drama techniques are used to create new ideas and evoke future design solutions, often with user participation thus bringing in more voices in the process (Medler & Magerko 2010, Brandt 2000, Newell 2006). Using drama has more intentions: It enhances communication both between design group members and stakeholders and between designers and users. It makes designers avoid becoming self-conscious. It informs on users' needs. Finally it explores design aspects on a collaborative basis.

Specific drama techniques in connection to design involve mainly two different forms of drama - improvisation and role-play - that have distinctly different characteristics (Medler & Magerko 2010, Brandt 2000).

#### IMPROVISATION

Improvisations are small, enacted scenes in front of an audience sometimes performed by trained actors. The scene has rules and constraints that the actor has to follow. The constraints provide the framing of the scene and helps drive action forward. One such method is the Forum Theatre – or stop-go – here actors play a scene that can be stopped by the audience. The actors ask the audience for suggestions for different actions and the scene is replayed again, now including the suggestions (Brandt 2000).

#### ROLE-PLAY

In role-play the participants deliberately assumes a character role in a scene (Simsarian 2003). Role-plays are used for e.g. evaluation of prototypes and determination of user needs. Some role-playing methods are inspired by the Stanislavskij tradition of being the character, where the designer-in-character asks “what if” questions to both character and scene (Brandt 2000).

#### PERSONAS AND DRAMA

The word 'persona' comes from Greek and means 'mask'. When we, in product development, work with personas we assume the masks of the users in order to understand their personality and their needs. With the understanding of personas as masks, it can be argued that using the method for role-play session is a natural development. The performative instance enables the designer to put himself in the shoes of the user thereby providing ideas about the wishes to and use of the product to be designed.

The use of role-play and drama in conjunction with personas is not reported at large in the literature. a couple of authors state the difference between drama and personas e.g. Newell et.al. (2006). They report from cases that use theatre techniques and Forum Theatre in the design process and how these differ from personas and scenarios. Brandt (2006) implicitly criticise personas for being a weaker method to keep the user in mind during design. This in contrast to design games that invites real users into the design process. Inspired by Focus Troupes (Salvador & Howell 1998), Pruitt &

Adlin (2006) suggests the use of local people to act as personas or the use of skilled actors to act out personas. Shyba & Tam (2005) use theatrical performances to develop on the goal-directed persona method as described by A. Cooper (1999). Loke et.al (2005) uses movement-oriented personas and scenarios to explore movement and social interaction in public spaces. Nielsen reports from two cases where designers and users in co-creation sessions use personas to create design ideas (Nielsen 2011). Here the users are similar to the personas and act as the personas, but are, at the same time, able to use their knowledge in the design process. Norman (2004) recommends having somebody act as the persona thus being a persona expert informant that designers can ask questions.

#### PERSONAS AND EMPATHY

Whether reading persona descriptions or acting as personas one of the perceived benefits of the persona method is its ability to provide an understanding of users, as it gives the design team a mental model of the particular kind of users. This allows for the team to predict user behaviour (in scenarios). Moreover the personas evoke empathy with users and prevent designers from projecting their own needs and desires onto the project (Floyd et al. 2008, Putnam et. al 2012, Matthews et. al. 2012, Nielsen 2012).

How the method is able to enhance empathy with the users is described in the literature, but the understanding of empathy is most often implied and not well defined.

Amy Coplan (2011) suggests defining empathy as an imaginary process in which another person's psychological states are simulated while the observer maintains a clear self-other differentiation.

Coplan designates the empathy carrier as an observer, but in the following case there is no observer, but rather an active acting subject. We will therefore designate the person that experience empathy for: “the subject”.

Empathy consists of three features: 1) affective matching, where the subject experiences states of affect that are the same as those of the target. 2) Self-oriented perspective-taking where the subject simulates the experience of being in the other person's situation thus constructing the subjective experience, but from own perspective. 3) Other-oriented perspective-taking in which the subject stays focused on the other person's experiences and characteristics. During the state of empathy it becomes possible to suppress the self-perspective, including own preferences, values, and beliefs and to adopt another person's perspective. This definition will be applied on the interpretation of the interviews.

#### THE CASE

The analysed survey includes 18 in-depth interviews with 13 companies from industry and public organisations. The interviews focused on how the organisations used personas, the benefits of the method,

and the obstacles for use. The interviewed came from large Danish companies: Danske Bank, Microsoft Solutions, Safecom and Widex. Middle sized Danish companies: Mjølner Informatics, AdviceDigital. Small Danish companies: Centre for Digital Pedagogy (Center for Digital Pædagogik), Value-Creating Construction (Værdibyg), The Food Culture Zone (Madzonen), and public organizations: Danish Broadcast (DR), The Royal Danish Library (Det Kongelige Bibliotek), The Danish Tax Authorities (Skat), Aarhus Libraries (Århus Bibliotekerne).

The transcript method of condensation has been used (Kvale 1997), and the condensed transcripts have been analysed for statements on use and use situations.

### NEW WAYS

The companies use personas in multiple design situations: they are used for website, app and product development, planning of environments, and service design. The method is used for alignment of communication, definition of target group, and for design of interaction. In parallel with the more traditional representation of personas as posters and hand-outs, interviews from five companies report that the employees have, at some point in time, created different forms of performance.

C2\_I1: "vi har også hoveder på pinde et eller andet sted. Når vi laver de her rollespil, det lyder meget fjollet, så kan vi have pindene op foran os, hvor der står profilen bagpå. Så kan vi simpelthen udføre de her rollespil. Og det lyder lidt tåbeligt, men det virker."

C2\_I2: "We have heads on sticks too somewhere. When we do these role-plays, - it might sounds very silly - but we can put the sticks up in front of us with the profile written on the back. Then we can perform these role plays. It sounds a little silly, but it works."

C3\_I1: "jeg havde en dukke og et dukkehus"

C3\_I2: "I brought a doll and a dolls house"

C3\_I2: "Vi har blandt andet lavet et lille venteværelse, hvor vi satte vores end-users (...). Til dispenserne kunne vi sætte dem op foran et bord der viste hvad har sådan en dispenser liggende på sit bord, rent arbejdsmæssigt. Den ene dispenser har måske bare sin Ipad og er meget sådan businessorienteret og orienteret mod det meget marketingsmæssige. Og en anden dispenser har alle mulige dimsedutter og alt muligt andet liggende. For hans professionaliserede faglighed ligger i at have alting at vise frem, og kunne sige: den, og den dims går med det og det."

C3\_I2: "We have for example made a small waiting room, where we put our end-users (...). For the dispensers we could put them up in front of a table showing this kind of dispenser has lying on his table, work-wise. One dispenser has maybe just his Ipad and is very business oriented and oriented towards what is marketing-related. Another dispenser has all sorts of stuff on the table. For his professionalism is having everything ready to show and say: "and the thing goes with this or that"."

Transcript 1: Three text fragments describing different tools.

Additionally three interviewees report that they have cooperated with companies that have used performance, but they have not actively taken part in performing activities.

From the interviews it is evident that there are many different ways of performing personas, but the performance is mainly used to act out scenarios. Common is the report that even though it is a mutually accepted method, the performance occurs as a spontaneous design activity.

The performance methods vary and will be described further in the next sections.

### USING PROPS AND SCENOGRAPHY

Some companies facilitate the performance activities with props such as; masks, figures, dollhouses, and as a scene made out of desks and location material. The materials can initiate the performing activities, thus spontaneously create the stage and drama.



Figure 1: The persona picture and few selected information are used as game pieces in a user journey. In this case the pieces are used to decide on design, content, and information channels.

Other companies have props at hand e.g. one company has a box with Lego figures, where each figure can represent a persona. They use the figures to perform scenarios. During the performance they take photos of the scenarios in order to capture the design instances. In this case, the activities are less spontaneous, they are not yet a set method, but part of the design toolbox. Furthermore a couple of the interviewees tell that they have spontaneously created props such as masks and game pieces with photos and few selected information on. These are then used in user journeys in order to explore the information flow and characteristics of the persona's search behaviour.

### ACTING OUT

The performances can be acted out both with hired actors and with internal personnel that act as the personas – and both with and without props. The acting takes part both in connection to the design process and as part of more fun activities such as company happy hour.

In the interviews we find that both the Stanislavskij method and the stop-go method are applied.

C4\_I1: "Hun (konsulenten) havde klargjort for denne her store forsamling fra kunden, at nu kom der nogle skuespillere som ville udleve de her personaer. Hun troede egentligt at det stod rimeligt klart, at det var det der skulle ske. Men efterfølgende så kom der simpelthen en af kunderne, og sagde: "Nej, hvor var det fantastisk at borgerne kom ind". (...) Og det tror jeg da uden diskussion kommer til at ændre på de beslutninger der bliver truffet, at borgerne kom."

C4\_I1: "*She (the consultant) had prepared for this big gathering with the client, that now some actors came who would act out these personas. She thought actually that it was reasonably clear that that was what was going to happen. But then one of the clients came, and said: "Oh, it was great that the citizens came." (...) And I think, that there is no discussion that this is going to change the decisions that are taken, that "the citizens" were there.*"

Transcript 2: Text describing the impact of performance by actors.

The Stanislavskij method is used e.g. when the designers act out a scene in a recreated office that are built to resemble the persona's office. The office space was built to illustrate the persona's context, but it gave cause to use it as a stage and thus initiate design ideation and discussion. It enabled the designers to physically put themselves in the persona's place.

The stop-go method is applied when scenarios are acted out and the method facilitates discussions and understanding of flow in actions.

C1\_I1: "Jeg kan i hvert fald huske en af de der demoer, hvor en stor, muskuløs udvikler faktisk havde rollen som Martha og skulle stå og logge på – i øvrigt – sådan noget mobilsystem. Men det var faktisk ikke noget vi havde sat i gang, men det var en måde, de havde valgt at (...) dramatisere den der demo på.

C1\_I1: "*I clearly remember one of those demos where a large, muscular developer actually played the role of Martha, and had to stand and log-on to – moreover – a mobile system. But it was in fact not something we had started, but it was a way they had chosen to dramatize that demo.*"

Transcript 3: Text describing a role-playing instance.

## DESIGNERS AND CLIENTS

The use of role-play and performance is perceived as a fun activity, but fun has both a positive and a negative connotation.

C2\_I1: "Jeg synes den der artistiske måde at gøre det på, dels er den lidt sjov i noget der godt kan være kedeligt engang i mellem. Og så kan den også bibringe processen og produktet noget andet Fordi det er nemmere at forholde sig til det hvis man har én der siger: "Nu leger jeg så, at jeg er Kasper"."

C2\_I1: "*I think it is artistic way to do it, and the fun of something that may well be boring once in a while. And it can also provide something else to the process and product. Because it is easier to relate to it if you have one who says: "Now I'm playing that I am Kasper."*"

Transcript 4: Text describing playfulness.

Internally it can be fun, but using performing activities together with clients are by some companies perceived as "too much" and that it can be difficult to convince the clients of the value of these activities.

Here the downside of role-play is that the interviewees see a risk that clients link fun activities to being unprofessional, and that could eventually harm the company's reputation.

C1\_I1: "Sådan noget enactment, ikke med kunder. (...) Det kan være grænseoverskridende. Vi har industrikunder fra Sønderjylland jo. (...) Vi skal ikke lege, vi skal lave noget."

C1\_I1: "*Stuff like enactment, not with clients. (...) It may transgressive. We have industrial clients from Southern Denmark. (...) We are not here to play, we are here to do something.*"

Transcript 5: Text describing the interviewees' perception of clients' view on enactment.

## CONCLUSION

By acting out the personas the designers both get an understanding of the persona as a character and of the flow of use, whether it is on a web site or how to move around in a building.

Common is that the performance occurs as a natural extension of the persona method, but not as something explicitly inherent in the method. The companies often find that they are the first to try out the different ways of performance. This separates performance related to personas from performance as design method and makes it difficult to transfer existing design and performance applications and experiences to the persona method.

The theory of empathy (Coplan, 2011) provides an understanding of the differences in adopting performance with stand in's, such as a figure or a doll, and the physical experience of assuming another person's identity. In the first experience the designer simulates the experience of being in the persona's situation and constructs the persona's experience, but keep his own perspective (self-oriented perspective-taking). In the physical experience the designer stay focused on the persona's experiences and characteristics and suppress own preferences, values, and beliefs. The designer will here adopt the persona's perspective (other-oriented perspective-taking).

Role playing and acting are used to create greater understanding and empathy for the users and their needs. As the personas creates identification, then the users of the persona descriptions assumes the identity of the person as part of understanding the persona or in order to explain how the persona acts – this is done as a argument. This was observed during the interviews, where the designers identify with the personas and change voices according to the different personas. This other-oriented perspective-taking enhances empathy with the personas.

The difference between these two forms needs to be looked further at in the future.

The performing activities provide an understanding that the choices made have a direct impact on the users of the products. It enhances the understanding both for the actors, but also for the spectators.

Finally the role-play is perceived as in opposition to rationality as it talks to the designers' emotions both in connection to the understanding of users and the consequences of the design. In line with this it is reported that it adds fun to the design process.

C2\_I1: "Det handler om at tilvejebringe en eller anden form for indlevelse, som også er det skuespillerne giver. Man kan emotionelt forholde sig til det, på et plan hvor det går ind og påvirker fornuften og det rationelle. Og man kan se det for sig hvordan de beslutninger man træffer rent faktisk har konsekvenser for brugeren, uanset om det er en brugergrænseflade eller hvad det er."  
C2\_I1: "It's about providing some form of identification, which is what the actors provide. You can emotionally relate to it at a level where it affects reasoning and rationality. And you can imagine how the decisions you make actually have consequences for the user, whether it is a user interface or something else."

Transcript 6: Text describing what performance brings to the design decisions.

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