

- ◆ Argues that Web designers and users communicate through personas and that the success of a site depends largely on how well these personas suit the purposes of both
- ◆ Presents guidelines that designers should ask as they construct and evaluate a site

Role Playing on the Web: Guidelines for Designing and Evaluating Personas Online

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Technical communicators who engage in Web site design take their task primarily as presenting information in clear, concise, well-organized terms—in short, making sites usable for their audiences. Other articles in this issue speak to the sophistication of the scholarship currently being done on such topics as navigation, usability, visuals, and text comprehension. But there is more. Organizations, real and virtual, work to establish a presence on the Web that attracts audiences and establishes a continuing relationship with them (Hunt 1996). This relationship—what we call the rhetorical nature of the Web and what many might argue is the most essential issue to understand and to manage—is, to our minds, the least well understood.

In this article, we start from the premise that humans communicate through a series of roles that they assume appropriate to their rhetorical purposes (Coney 1992). Even when speaking face to face, they present a version of themselves that they deem suitable for the time, place, and situation. When this rhetorical principle is applied to Web design, it provides powerful insights and strategies for designing and evaluating online communication. We begin this article by tracing how the tradition of rhetorical role playing has become incorporated into the electronic medium. We then present a series of guidelines in the form of prompts or questions as starting points for effective Web design.

DESIGNERS AND USERS—REAL AND RHETORICAL

One of the hallmarks of technical communication scholarship and practice has been audience analysis. From its inception as a discipline, the field has understood the importance of putting audience at the center of attention. Although *user* has gained primacy over the more traditional term *reader*, that interest has remained central. But whatever term is used, scholars and practitioners have treated

audiences in two distinct but related ways:

1. As real people who possess *measurable* characteristics and goals
2. As imagined beings who embody *intended* characteristics and goals (Ede and Lunsford 1984; Coney 1988)

The former have been the subject of a long tradition of study in technical communication and the staple of college textbooks. Early attempts to track actual audiences were usually based on anecdote and informal observation (Mills and Walter 1962; Souther and White 1977); more recent work employs rigorous analysis and empirical testing (Wixon and Ramey 1996; Hackos and Redish 1998). The conception of audience as one imagined either by the author of a text, the reader, or both has been well known since the 19th century by such writers as George Eliot and Henry James. But the potential for the “imagined” or “mock” reader has also been exploited with great success by contemporary technical communicators who see it as a logical complement to the audience “out there.” Probably the most well-known proponent of imaginary users of the Web is Alan Cooper. In *The inmates are running the asylum* (1999), he argues that designers should focus their energies on one single, well-realized person—a persona—and forego the useless task of trying to please an aggregate of actual users.

Personas are not real people, but they represent them throughout the process. They are hypothetical archetypes of actual users. Although they are imaginary, they are defined with significant rigor and precision. Actu-

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ally, we don't so much "make up" our personas as discover them as a byproduct of the investigation process. (p. 124)

It's important to note that while Cooper sees the user persona as the key to good design, he acknowledges that the inspirations for that persona lie in the designers' understanding of the *actual* users. One informs the other; it isn't an either/or choice.

What Cooper doesn't discuss is how the user persona serves the actual user, as well as the designer. That important link is supplied by reader response theorists who argue that, in taking on the persona "mask," members of the real audience enlarge their learning base and deepen their individual experiences as they engage with a text (Burke 1950; Gibson 1980; Booth 1961; Ong 1975; Coney 1992). This expansion of self, because it includes not only confronting new information but also incorporating that information into existing schemas, is how meaning is made (Fish 1989).

Similar arguments are made by cognitive theorists (for example, Kintsch 1998) who state that readers build different types of representations of a text: *surface* or verbatim representation (letters, words, sentences), *semantic* representation (conventional meaning, based on lexical/syntactical knowledge), and *situational* representation ("mental model"). This situational representation is the "image" of the reality the text refers to, but it is more than the information that is represented in the text. Readers transform and expand the text content by integrating it with their prior knowledge, beliefs, needs, preferences, and cultural assumptions. So the reader is not simply "decoding the message" but actively engaging in building his or her own knowledge base.

Both approaches—the rhetorical and the cognitive—deny the separability of content from context, or text from the author or the audience. When we analyze a text, whether it be printed or electronic, we should, rhetoricians believe, study all these factors, particularly *their relationship among each other*, to predict how effective a document will be for its intended audience. Thus, current rhetorical conceptions tend to be inclusive in nature, requiring holistic and qualitative analysis of communication situations. Nevertheless, for purposes of analyzing Web sites for their rhetorical effectiveness and designing Web sites that are rhetorically effective, it is necessary to establish first some clear understandings of the individual factors that constitute any rhetorical consideration of the Web.

Rhetorical roles

If we view readers as actively engaged in a process of making meaning, cooperating closely with the author, then the concept of *role playing* serves as a very insightful and

useful design tool. Readers are not considered so much *recipients* of information as *participants* in a drama in which they play the lead role, as heroes who enter into unknown territory in pursuit of specific goals. The author becomes not so much a removed sender of information as a visible persuasive presence, a fellow actor who aids and abets the hero/reader in his or her quest (Goodwin 1991).

Scholars and writers have long been aware of the potential of role playing to understand the nature of *any* communication—to better predict its success and to understand where it has gone wrong (Thralls, Blyler and Rothchild Ewald 1988; Coney 1992). They argue that communication participants, whether they are called writers and readers or Web designers and users, engage in active dialog with one another, each taking on a role that serves a particular function in the communication and that serves the purposes of each. For example, in manual writing, Coney and Chatfield (1996) have found that an author can develop an authorial persona of the "helpful mentor" and a complementary role of "eager learner" for the reader. Steebouder (1997) shows that readers of operating instructions can be addressed in a role of "operators" who are interested in buttons and switches, but also in a role of "users" who want to use their appliance for "real life tasks." Depending on which role they choose, readers will construct different meanings from the text.

In other words, whenever writers or designers use some form of the word *you*, they are addressing not you, the complex person that you are in actual life, but the person they have imagined for their audience as they drafted their document. This imaginary person, the one Alan Cooper calls the "user persona," or simply "persona," comes from many sources: strictly from the designers' memory of who they *think* or even *guess* their audience will be; from other, similar documents that the author may be modeling in some way; or from some form of analysis of the actual audience that is likely to visit and use the site (Simpson 1989).

But whatever the source, designers embed their notion of readers or users into a document by giving their audience *a role to play*. And the degree to which the actual audience is able and willing to assume and maintain that role while using the document will largely determine how successful the site is—for the designers as well as for the users. Obviously, there will never be a perfect fit between the actual person who enters a site and the designers' vision of that person. All us as readers of conventional texts are well schooled in making this transformation from our actual selves to an imagined self, but it is true that some readers are better than others are at assuming roles. They may have a larger vocabulary or knowledge base, be more culturally sophisticated, or simply be more open-minded and adventuresome.

For these audiences who want to use the Web for escape and entertainment, Web designers may well create roles which they can be certain do *not* fit the real user: visitors can be invited to play the role of a medieval knight errant or the role of an alien, as in many computer games. Indeed, part of the fun of playing such games is assuming roles very unlike one's ordinary self. In this latter case, where there is often little connection between the actual audience and the roles they play, Cooper's definition of persona—"hypothetical archetypes of actual users"—seems too limited. Our definition of user persona includes *all* roles assumed by users, whether drawn from an identifiable and measurable audience or from the imaginations of the site participants.

On the other side of this dramatic equation, authors transform themselves as well into whatever role is required by the document they are producing. Again, this transformation from actual author(s) to a persona who inhabits the site along with the user persona has roots in literary tradition. Terms such as *voice* and *tone* refer to this authorial persona, and have long been recognized as important rhetorical aspects of any communication (Coney 1988). However, the concept of role playing implies a more robust presence for the authorial persona: a presence in the text that interacts with the user persona, providing a dynamic exchange as one moves from screen to screen. The choice of authorial persona depends partly on the content and purpose of a particular document, but also on how the author wants to relate to the user—for example, teacher to student, seller to customer, colleague to colleague. What's important is that these roles suit the purposes of each participant. Only then can the dramatic encounter within a site be mutually satisfying.

For purposes of this article, we make the following distinctions among the several parties involved in creating and using a Web site. When speaking about the readers (or visitors) of a Web site, we may refer to these three entities:

- ◆ The *real visitors* are the persons that actually visit the Web site and, for whatever reason, read the information it contains.
- ◆ The *target visitors* or *target audiences* are those people the Web site is intended for. For instance, a Web site about the European Soccer Championships is intended for visitors that appreciate soccer and know about it, even though many other people can and may visit the site. The designer of the Web site will shape the content and style to the target audience.
- ◆ The *user persona* is the role that is "created" in the Web site, as described in the introduction to this article.

When speaking about the creators of a Web site, we distinguish among the following terms:

- ◆ The *owner* of a Web site is the person or organization who owns the site, pays for it, and commissions the designer to design, produce, and maintain it.
- ◆ The *designer* is the person, company, team who actually makes the decisions about the purpose, content, and form of the Web site. We will not distinguish among all those that contribute to the designer role, such as writer, graphic designer, programmer, and system manager.
- ◆ The *author persona* is the person or voice who speaks to us. No matter how influenced by real people on the design team, the author is a role created specifically for a site—a personage that is put on the stage by the designer.

An example

When we entered the home page of Web site www.dearparents.com in July 1999, the first two paragraphs stated the reader and author role explicitly (see Figure 1).

These paragraphs define the rhetorical roles that are assumed in this Web site. The user persona is supposed to be a *parent*, even more specifically, a parent that recognizes herself or himself in the role of a *teacher* who values success, who is caring, yet who feels the need of support or advice. The author persona, on the other hand, presents herself as a very experienced person. The communication between the two is defined as "sharing what we've learned" (as opposed to "helping," "instructing," or merely "informing").

It is important to realize that the *real* visitor and author can be very different from these roles. The real visitor may be childless or may not consider him- or herself as a teacher of his or her children at all. The real author may in fact be a group of technical writers, and the owner may be a company, and not really the experienced person implied by the text. The Web site *creates* roles that define the content, the tone, the way of communicating within the site. The communicative effect depends on the degree to which the author role is attractive and trustworthy to the real readers, and whether the real readers are able and willing to play the role attributed to them.

Role playing on the Web

The rhetorical principle of role playing is given new vitality as it moves from a printed page to a Web page. In this interactive environment, the roles are more visible, more flexible—indeed, more dramatic than in traditional media (Bolter 1991). For online designers, there are many ways of adapting to the preferences of individual users as they go online. Indeed, the Web itself is designed to empower users to choose from a variety of roles offered them at a particular site, and to create their own meanings by following different pathways through the information. Some

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Dear Parents

SOUND ADVICE ON LEARNING & TECHNOLOGY

You are your child's first teacher and an important influence throughout his or her school years. As a parent, you want to help your child succeed and you may have questions about how you can most effectively do that.

We have learned a great deal about how children learn—and how to help them—over the past 27 years. The Dear Parents site is an opportunity for us to share what we've learned with a community of caring parents.

New Question


 My son is almost 6 years old. In Kindergarten, his teacher does not really do too much phonics with him. Therefore, I read to him often and work with him on sight word flash cards. I introduced the Bob Books to him and also Dr. Seuss. He is beginning to read. Is there a

Figure 1. Dear Parents Web site opening paragraphs (www.dearparents.com).

scholars argue that this experience of free choice is more illusional than real—that these new technologies retain power or control for the designer while only appearing to empower the user (Johnson-Eilola 1997). Nevertheless, in contrast to most print documents, which are fundamentally linear, hypertexts allow designers and users to engage more directly with the content and each other.

Advanced technologies such as adaptive hypertext offer even more complex possibilities. For example, Web sites can customize information to the user's personal characteristics (for example, Dutch Tax information can be framed for younger as well as older people, and Amazon.com traces customers' preferences and suggests other books that might interest them). Thus, customization, an on-the-spot response to users' choices, is becoming commonplace in cyberspace. Beth Kolko (1999) analyzes the rhetorical nature of avatars, those representations of selves in cyberspace, and argues that avatar systems in graphical virtual realities form three distinct populations:

1. Default avatars provided by commercial graphical virtual realities
2. Avatars designed by individual users from original or publicly available component parts
3. Avatars created by commercial design firms

"Each of these populations," she concludes, "will have different motivations and concerns that inform their decisions about what kinds of avatars to create" (p. 179). In these highly interactive graphical virtual reality environments, the dynamic nature of role playing with its freedom to continually reinvent oneself is fully demonstrated.

But technological possibility does not ensure sound rhetorical choices. The effects of poorly conceived or constructed roles cannot be mitigated by well-designed graphics and navigation, or well-crafted text. If we as users don't like who we are allowed—sometimes required—to become as we enter a particular site, we are not likely to stay for long. And if the authorial persona we are expected to engage with is offensive, condescending, confusing, inconsistent, or just plain boring, few sites can hold us for long. Thus it behooves Web designers to become as rhetorically sophisticated as they are technically adept, to understand the power and potential of role playing as a major component of good design.

Toward this end, we offer the following guidelines to guide designers as they analyze and construct Web sites. As important as rhetorical analyses and construction of roles are, they resist by their very nature any definitive precepts that extend beyond the particular context of a particular Web site. In contemporary rhetoric, situation is all, and universal solutions are always suspect. While we have argued in this section that the concept of role playing applies widely across all kinds of documents serving all kinds of purposes, our guidelines and examples will focus on designing sites principally devoted to presenting information. We recognize, however, that rarely is a site purely informational in nature; almost always some other purpose such as persuasion or amusement is present to some degree or another. Further, these guidelines are intended to be used in the design process in both its planning and evaluation phases, and are divided into three major sec-



Figure 2. The home page of the British Library shows an almost anonymous persona. There is no first person; the only mission mentioned is “providing” services, and even the option for sending e-mails is very neutral (www.bl.uk).

tions: designing an author persona, designing a user persona, and designing their relationship. Inevitably these categories overlap with one another, yet for purposes of explanation and demonstration, we have treated them separately.

1 DESIGNING A CREDIBLE AND INVITING AUTHOR PERSONA

Credible The most important function of an author persona in an informational Web site is to create credibility. The audience has to be convinced that the information on the site is truthful, relevant, complete, and accurate. In some cases, this goal might be quite easy to achieve (for example, few would mistrust the catalog of the British Library). But when the source or subject of the site is not already well known for its credibility, establishing an author persona that can be relied on is critical to the success of a site. When users visit a Web site devoted to a particular illness, they want to know whether the author has sufficient medical expertise to be trusted. Potential buyers who consult reviews on Amazon.com want to verify whether the reviewer shares their taste and values regarding books before they put in their order.

Inviting Another good reason for creating an identifiable persona might be that it would make the information more inviting. Designers of informational Web sites should define their task not only as providing information, but also as motivating visitors to read, understand, and use the information. Horton (1997) distinguishes “friendly” documents from “seductive” documents. The first type, he contends,

enables readers to find information; content is presented clearly and readably. Seductive documents, on the other hand, *motivate* readers to read and to act; they show and teach, convince and influence.

1.1 Consider the presence of the author persona.

Key decisions

- ◆ Should the author persona be anonymous or identifiable?
- ◆ Should the author persona have a strong presence?
- ◆ Should peripheral cues be used to reinforce the author persona?

One option is to choose an *anonymous* persona (see Figure 2). This is the choice made in many home pages where the owner, though his or her name is mentioned, does not speak directly to the visitor. The site simply opens with a list of hyperlinks or with the “latest news” (see Figure 3). The anonymity of the author persona does not, however, mean that it is absent: Each visitor understands or at least intuits that there is a person or organization addressing itself to the visitor. The anonymity can underline the neutral, informational character of the Web site and thus add credibility to the information.

On the other hand, creating an *identifiable* persona can also increase the credibility of the information. To increase visitors’ confidence that the information is reliable and relevant, designers should consider adding one or more of the following features to a Web site (see Alexander and Tate 1999).



Figure 3. The homepage of Euro2000 (European Soccer Championships): the author persona is anonymous; the attention is focused on the latest events (www.euro2000.org/en/home—July 1999; the page has since been changed).

- ◆ An explicit statement about who is responsible for the Web site, and information about his/her (professional) background and expertise—This content enables the audience to judge the truthfulness of the information.
- ◆ A description of the purposes of the owner of the Web site, and the owner's vision and values—The audience will be better able to assess the biases of the information.
- ◆ An address for contact and reactions—This information opens up a dialog with the author persona, suggesting an interest in the user's questions.
- ◆ The pronoun “we” to personify the organization or company—For example, “We are one of the largest communication consultancies in the Netherlands.”
- ◆ A description of the organization: “Who are we?” or “About our organization”—Such a description may be put on the home page, but also on separate pages, linked with the home page. These descriptions can be used to present the organization's mission, vision, and credits.
- ◆ One or more individuals put on the stage (for example, the general manager or the founder)—These persons may be portrayed by a single picture or by

a complete biography; they may also address the reader directly with the first person pronoun, singular or plural.

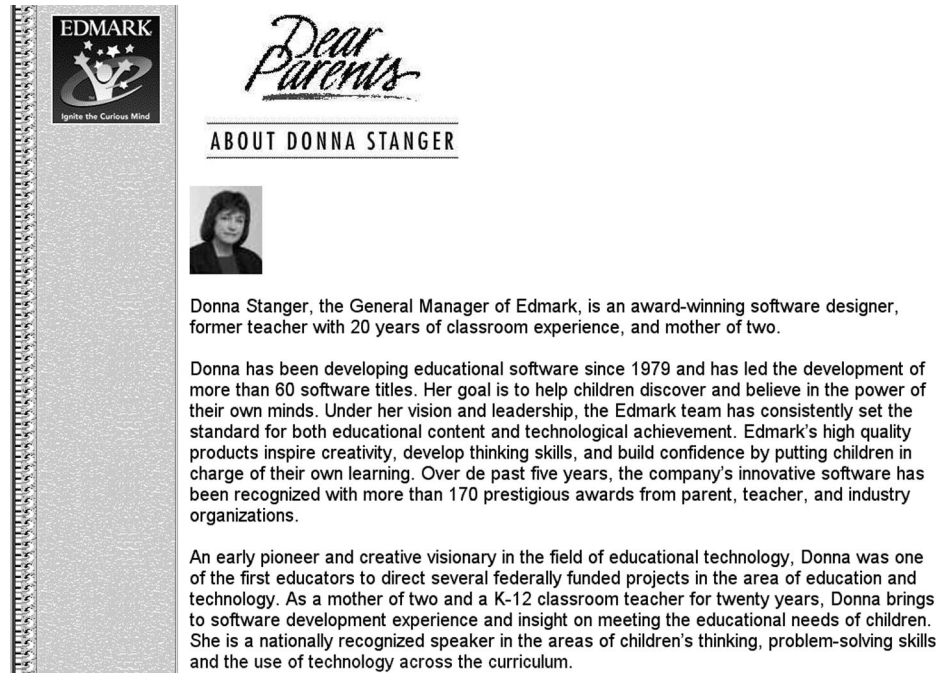
By adding such features, the designer can make the author persona more manifest, more personable, more memorable.

An important feature for creating an *inviting* persona is point of view. Consider the British Library home page (see Figure 2) that starts with “*The British Library provides. . .*” A more inviting approach from the user perspective would read “*In the British Library you will find . . .*,” a change that suggests more clearly that the author is interested in the needs of the reader. On the same page, the hyperlink to “Chapter & Verse: 2,000 years of English literature” could be made more inviting by adding something like “*Visit our pages . . .*” And below that, the expression “*Getting in touch*” is more inviting than, for example, the simple indication “*Webmaster*” that is found on many Web sites, but less inviting than, for instance, “*Mail us at . . .*”

An inviting tone shows that the author persona is aware of the visitor and recognizes the visitor's needs and interests. Of course, there are many ways to intensify this inviting style, but there is always the risk that it can slip into a promotional style, which may be inappropriate for informational Web sites (see guideline 3.4 in the article by Spyridakis in this issue). The designer needs to find the golden mean.

Web designers must know which characteristics make personas credible and inviting for their *real* audience. Audience analysis and empathy can guide designers to make the correct choices here. It is also important to consider cultural differences. During our international workshop in July 1999, we discovered, for instance, that strong and explicit emphasis on one's expertise (see Figure 4) was appreciated—or at least tolerated—by most American participants, but rejected by most European participants (especially those from Scandinavia and the Netherlands). In the eyes of these participants, the emphasis on expertise made the persona *less* credible and attractive. Cultural differences can complicate the task of creating *universally* credible and attractive personas.

One of the decisions to be made is whether *peripheral cues* should be used to increase the credibility of the author persona. Peripheral cues are elements that evoke positive associations but do not rely on rational considerations (Petty and Cacioppo 1987; Hoeken 1995). For instance, an esthetically attractive page design may lead the visitor to experience positive feelings, which in turn may encourage a stronger belief in the quality of the information. The relation between the esthetic qualities of the page design and the quality of the information is indirect yet powerful. Although there is no guarantee that designers who pay careful attention to the quality of their page design will also pay careful attention to the quality of the content of the information, the assumption is that they will. Even content



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Dear Parents

ABOUT DONNA STANGER

Donna Stanger, the General Manager of Edmark, is an award-winning software designer, former teacher with 20 years of classroom experience, and mother of two.

Donna has been developing educational software since 1979 and has led the development of more than 60 software titles. Her goal is to help children discover and believe in the power of their own minds. Under her vision and leadership, the Edmark team has consistently set the standard for both educational content and technological achievement. Edmark's high quality products inspire creativity, develop thinking skills, and build confidence by putting children in charge of their own learning. Over the past five years, the company's innovative software has been recognized with more than 170 prestigious awards from parent, teacher, and industry organizations.

An early pioneer and creative visionary in the field of educational technology, Donna was one of the first educators to direct several federally funded projects in the area of education and technology. As a mother of two and a K-12 classroom teacher for twenty years, Donna brings to software development experience and insight on meeting the educational needs of children. She is a nationally recognized speaker in the areas of children's thinking, problem-solving skills, and the use of technology across the curriculum.

Figure 4. Edmark's general manager Donna Stanger is presented with a strong emphasis on her expertise that might undercut her credibility with some audiences. (www.edmark.com; the page was removed from the site in late 1999).

and presentation of the information itself can affect the issue of credibility of the author persona. (See guideline 4 in the article by Spyridakis in this issue.)

1.2 Consider the role(s) of the author persona.

Key decisions

- ◆ Which role(s) will the author persona take?
- ◆ Will the author persona take one or more roles?
- ◆ How will the role(s) be prompted?

The author persona is not only defined as a particular person or organization, but also by the role that is played. The author persona can play such roles as the host who welcomes guests; as the guide who shows visitors the arrangement of the building and takes them on a tour; as an advisor who helps users find solutions for their problems; or as a librarian who helps users find the right information. The choice that will be made here is paramount for the structure of the Web site. For instance, the Southwest Airlines home page (Figure 5) shows a picture of an airport check-in desk with clickable elements all over the picture. The home page suggests that visitors are welcomed by an agent, who does the things you'd expect from someone in that position: provides information brochures, makes reservations, hands out newspapers, and so forth. However, some of the choices do not really fit with this persona, such as receiving application letters (in the mailbox titled "Careers") or giving information about the company president (whose portrait is right above the desk).

The choices of which role or roles to assign the author persona are largely dependent on the goals of the Web site and the type of information to be included. A counter agent seems a perfect persona for service-oriented Web sites such as airline companies or libraries. The choice of the persona will strongly influence the structure of the site (see the article on navigation by Farkas and Farkas in this issue).

1.3 Consider the values of the author persona(s).

Key decisions

- ◆ Which of the organization's values should be emphasized?
- ◆ How explicitly should these values be presented?

There are several reasons why it is important to pay careful attention to the values that are expressed on a Web site and the way they are expressed. First, Web sites are the windows through which the organization is seen by its public. For informational Web sites in particular, designers need to make explicit the organization's values; these can have a compelling effect on visitors as they move through a site and make judgments about its relevance and validity.

Elements of the organization's mission should become apparent on the site as well. Because missions usually contain a rich compilation of objectives and values, it is advisable to select a *limited* number to be emphasized in the site. Designers should consider carefully what elements have priority from the organization's point of view, and what elements should add most to the Web site's credibility



Figure 5. The persona of this Web site is presented as a check-in counter agent (www.iflyswa.com—July 1999; the page has since been changed).

and attractiveness. For instance, the University of Twente’s English home page (see Figure 6) underlines the entrepreneurial mission of the University, but its Dutch home page emphasizes its efforts to integrate technical and social sciences. Apparently, the designers judged that the Dutch audience appreciates a different set of values than visitors from other countries.

Values can be presented emphatically by explicit statements on the home page (as in Figure 6), or on a separate page (linked, for instance, with “Who are we?”). They can also be presented implicitly in information about the organization’s history and current activities. They can be described in a neutral way (see Figure 2) or in a strong direct style, using the first person pronoun, or they can be expressed by a persona who represents a leader of the organization (such as the general manager in Figure 4).

Designers should be aware that Web sites—particularly home pages—express values even when they don’t intend to do so. The home page of the University of Washington in Seattle (see Figure 7) shows us (apart from some hyperlinks) two key elements: a realtime video camera view of the library with, on bright days, a view of Mount Rainier (although European visitors see no more than a black rectangle when they visit the page during their daytime), and a report of the actual weather. Some years ago, these features might have represented the advanced technologies that are characteristic of the University and thus indirectly express some essential values of this organization. However, because realtime camera views and weather reports are now common on the Web, the home

page no longer expresses what is a unique characteristic of the University of Washington. On the other hand, visitors may think that the beautiful campus and the weather are the major concerns of the University of Washington community, and they would be correct.

An important question to consider is the extent to which peripheral issues should be used to express the values of the persona. Many Web sites give details that are not directly related to the core business or mission of the organization, but that create an atmosphere intended to attract the target audience. Go2Net, a Seattle start-up company, makes its vision explicit on its job opportunity page: “to be the Internet’s premier destination, leveraging an innovative network of virtual communities to help our users conduct research, access financial resources, play exciting games, and effectively participate in the electronic marketplace” (go2net.com). It is perhaps a bit surprising to learn that the company’s “software engineers breed butterflies in their offices and play strong music” or that the “CEO, despite being one of the country’s most successful entrepreneurs, always wears a T-shirt.” Clearly the authorial voice reflects the hip, cutting-edge character of the company.

There are many examples of such peripheral elements, often more serious than breeding butterflies or strong music. Many organizations, for instance, announce that they subscribe to values such as nondiscrimination, free speech, or equal rights for minorities. Other organizations emphasize their sponsorship of popular sports teams. Other important peripheral features are the visual appearance of the Web site: the colors, the graphics, the fonts that are used, and all kinds of movements (marquee, blinking texts, ani-

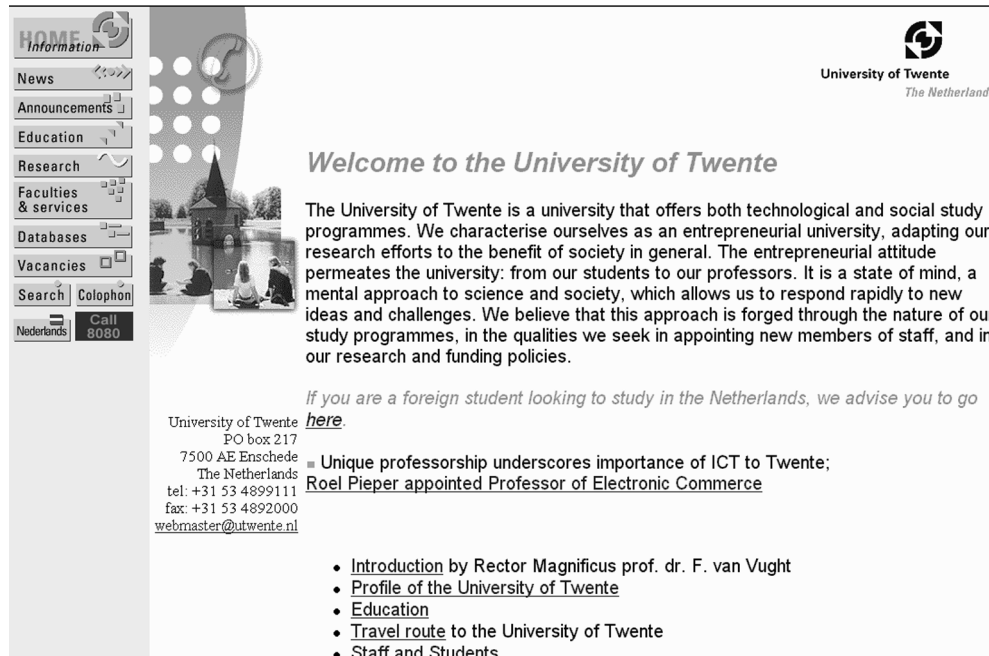


Figure 6. Home page of the University of Twente, showing key elements of its mission statement (www.utwente.nl).

mations, videos). One might think that designers of informational Web sites should refrain from such elements, as they distract visitors from the core information. But these features can contribute to the credibility and attractiveness of the author persona.

2 DESIGNING PLAYABLE AND ATTRACTIVE USER PERSONAS

Once visitors have entered a Web site, they can freely decide whether they will stay at the site or leave it. Their decision will be based heavily on whether they feel themselves welcome and acknowledged. When designers want their target audience to get fully engaged in the Web site, they must create user personas that visitors are able and willing to assume. On the other hand, by creating clear cut user personas, designers can also show which visitors the site is *not* intended for.

The user persona also functions as guidance to the way the actual visitors will process the information in the Web site. For instance, visitors to the DearParents Web site (see Figure 1) who play their role adequately will process the information from the perspective of a parent seeking advice for educational problems.

2.1 Define the role(s) of the user persona(s).

Key decisions

- ◆ What role(s) should the user persona have?
- ◆ Which goals should the user persona have?
- ◆ How should the user persona(s) be prompted?

The user persona is, in the first place, characterized by the *role* the visitor is supposed to assume—for example,

customer, parent, e-trader, student, or traveler. This role defines what sort of information the visitor will find at the Web site and from what perspective the information will be given. Most informational Web sites provide information that is important for different groups of users. Reader roles, therefore, are important features for creating structure in the Web site. Usually this structure takes the form of a list of hyperlinks that reflect

- ◆ Different reader roles from which the visitor can select the ones that match best his or her own situation and information needs
- ◆ Different reader goals or questions from which the visitor can choose the most appropriate for his or her purposes

Although some designers will argue that these hyperlinks refer to *real* visitor groups, we argue that the hyperlinks reflect roles because any visitor can freely choose which role he or she wants to play. Moreover, some visitors will probably not identify readily with any of the roles that are offered but will choose the one closest to their interests. User roles are an important organizational device and can help designers because they appeal to a wide variety of needs, perspectives, attitudes, and values.

2.2 Consider the values to be attributed to the user-persona.

Key decision

Should values be expressed directly or indirectly? It is not only the *role* of the user persona that affects its attractiveness for the real visitor to a Web site but also the

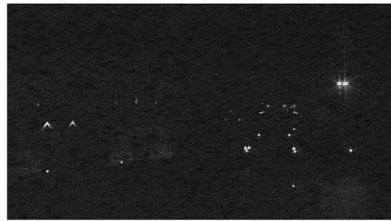
University of Washington

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Almost Live - Rainier Vista in Seattle.
 Wednesday, March 15, 2000 at 01:23.
 Temperature: 39F, 4C. Winds: 2 mph from
 the NE (4 mph gusts). Barometric pressure:
 30.27 in (1025 mbar). Relative humidity: 92%.
 The sun will rise today at 06:21 and set at
 18:16. The moon is waxing gibbous (62% of
 full).

Figure 7. Home page of the University of Washington, viewed at 10:23 a.m. in the Netherlands (www.washington.edu). Links refer to pages that elaborate elements of two important but distinct personas: “About the UW” and “President McCormick.”

values that are attributed to the user persona. For instance, parents who are looking for advice on learning and education may feel themselves uncomfortable with the emphases on success and effectiveness in the Dear Parents page (see Figure 1); they may appreciate other values more, such as good behavior and moral growth. That dissonance does not necessarily mean that the designer of this site made a bad choice. Because the educational programs offered by Edmark have to do with cognitive skills and school learning, the site appeals most to parents who share the values mentioned on this page.

When considering the user persona’s values, designers need to consider the values they are promoting, however directly or indirectly. When the author persona, for instance, expresses the belief that universities should be “entrepreneurial” (as in Figure 6), the assumption being conveyed is that the visitor will share this value. Visitors who reject this value may not leave the Web site immediately, but they will read other information on the site with more mistrust than those who share this value. The resisting readers are confronted with a user persona that may be still playable but is not really attractive to them.

Therefore, it is somewhat risky to express the user persona’s values directly because such an approach can easily be taken by the real visitor to the Web site as a face-threatening act (see guidelines 3.1 and 3.2 in this article). The author persona can be accused of strong

meddlesomeness. The more *basic* the imposed values are, the more strongly visitors will resist. Suggesting that visitors will be interested in soccer matches is less threatening than suggesting, for example, that they should believe in corporal punishment for disobedient children.

3 DESIGNING COMFORTABLE RELATIONSHIPS

As we argued above, the two personas and their relationship cannot be fully seen as separate features of a Web site. They are each other’s counterparts. If the author persona is a counselor, the user persona must be someone looking for help; if the author persona is an organization that sells books, the user persona must be someone who (potentially) wants to buy a book. Even when the real visitors have other goals when entering a Web site, they will understand and accept that they must play the offered role of the user persona.

However, given such functional relationships, several aspects of “relationship” have still to be worked out. For instance, if the author persona is defined as a professional and the reader role as a person seeking advice (as in Figure 1), a strong hierarchy might be established between the roles: the author role being the “higher” one—having authority, taking the initiative; and the visitor role being the “lower” one—dependent, asking, following. But the roles can also be worked out in a more equal way. The expression “sharing what we have learned” (see Figure 1) suggests that the professional has been as ignorant as the

visitor in the past and that both personas are (or were) essentially in the same position. The best relationship, in our opinion, is the one that the real audience will feel comfortable in. We will discuss three aspects of relationships that are important for achieving that goal.

3.1 Consider the distance between author and user personas.

Key decisions

- ◆ How familiar should the tone be?
- ◆ How hierarchical should their relationship be?

A feature that is particularly interesting in relation to the World Wide Web is the issue of familiarity versus *distance*. Many Web sites, even those of sophisticated organizations, are very informal and “close to the reader.” The intimate tone of Go2Net.com, mentioned earlier, is a good example. Most forms of such camaraderie, however, can be found in subcultures and in Web sites of virtual communities that have no formal organization behind them. Most informational Web sites have a more distant, professional tone because that is believed to reinforce their credibility most effectively.

Distance does not necessarily mean that there is a strong hierarchy between the author persona and the user persona. Hierarchy means that one party is considered as standing “above” the other. There are many sources of this hierarchy, such as economic power, political power, social status, or organizational control. For informational Web sites, professional authority is the most important issue to consider here. Of course, the visitor should be convinced that the author persona is an expert in the field. But the more strongly the expertise is emphasized, the more the author persona is positioned “above” the reader role—a relationship that might lead the visitor to resist both the role *and* the content.

When Web sites are directed to international audiences, decisions about the design of relationships are even more difficult because visitors from different cultures react differently to familiarity and hierarchy. Some may feel themselves comfortable in the shadow of the author persona, but others may feel resentful. Therefore, the best choice is probably a neutral one: Provide information about the author persona’s credentials, but don’t blow the trumpet. The following recommendations can help.

- ◆ Avoid strongly affective adjectives and adverbs—especially those that don’t have a clear factual meaning—such as *leading*, *visionary*, *successful*.
- ◆ Let the facts speak for themselves. For instance, if a person is editor-in-chief of a professional journal, simply mention this position, but do not write that he or she has been “elected to” or “appointed to” that role—phrases that emphasize personal aggrandizement. Saying that someone is “known for his or her many international contacts” sounds stronger

than simply mentioning that he or she “has many international contacts.”

- ◆ Don’t suggest more than there is. If you write that someone has published “over 60 articles,” the effect is inflationary; simply give the exact number.


3.2 Consider politeness.

Key decisions

- ◆ How can you avoid unnecessarily strong face-threatening acts?
- ◆ How can you compensate for face-threatening acts with politeness?

Brown and Levinson (1987) argue that communication often threatens people in two essential ways. First, communication may threaten one’s freedom of choice because it tries to impose certain attitudes or actions on one of the parties. For instance, giving orders, asking favors, showing interest in someone’s possessions (suggesting that you want to have them), or even offering a gift (which puts an obligation on the addressee to be thankful or to pay something back)—all these can be perceived as threatening. Since almost every form of communication makes some kind of appeal, there is always a possibility for readers to perceive it as an attack on their freedom.

Figure 8. Example of the Off Record strategy. The damage is “accidental,” the destructive children are “young computer users,” and “protecting your files” has been turned into the positive “teacher- or parent-approved programs.” The indirect formulations prevent embarrassment to the visitor by implicit accusations (www.edmark.com/free/demokiddesk).



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THE BRITISH LIBRARY

Visiting the British Library

The British Library is the national library of the United Kingdom and one of the World's greatest libraries. The British Library welcomes visitors to its spectacular flagship new home at St Pancras in Central London.

Facilities for the public include [Exhibition Galleries](#), [Events Programme](#), [Services for Schools and Colleges](#), [Tours of the building](#), [Bookshop](#) and [Catering facilities](#).

The British Library is a research library, not a public reference library. The library areas (Reading Rooms) at St Pancras are not open to the public: admission is by reader's pass. [Reader Admissions](#) will provide information on how to apply to use the Library's research facilities.

The building is open to the general public at the following times:

- Monday, Wednesday, Thursday and Friday 09.30 to 18.00
- Tuesday 09.30 to 20.00
- Saturday 09.30 to 17.00
- Sunday 11.00 to 17.00

Figure 9. The British Library does not state that “you” have no access, which would harm the visitor’s freedom of choice, but it uses an Off Record strategy by not addressing the visitor directly here (that is, by referring to “the public”). In this case, another solution might have been to turn the information into the positive: “You can get access to the library’s facilities by . . . ,” thus presenting the information about restricted access in a more positive manner (www.bl.uk).

A second form of threatening occurs when our communication makes a criticism or an accusation, which threatens the self respect or honor of a participant in the communication. Because many forms of communication involve some kind of implicit evaluation of the reader, there is always a risk of irritating the reader by such action. “Face-threatening acts” are almost inevitable in communication because language users want others to do something, and inevitably express (or imply) certain judgments about others. But humans will also try to minimize these threats because it is generally in everyone’s interest to maintain face. To that end, Brown and Levinson have identified a number of face-saving strategies and classified them in four basic categories.

- ◆ **The Bald on Record strategy** Present the face-threatening act without reservations. This approach suggests that you don’t consider the act as a strong face-threatening act (otherwise, you would not have formulated it this way).
- ◆ **The Positive Politeness strategy** Compensate for what’s threatening by showing appreciation for and solidarity with the other.
- ◆ **The Negative Politeness strategy** Lessen what’s threatening by emphasizing that the other is free to choose.
- ◆ **The Off Record strategy** Present the face-threatening information in an indirect way (see Figure 8 and Figure 9). For instance, instead of “You have

probably never heard of . . . ,” you could say “Not much is known about” Other forms of indirect formulations are passives, nominalizations, or irony.

Although these strategies are worked out mainly in scholarship about oral communication (for example, van der Wijst 1995), they can be applied to written communication as well (for example, Jansen 1992), and we believe that they are potentially relevant to Web site design. As far as we know, however, no research has been done on this issue yet.

QUICKLIST FOR DESIGNING PERSONAS

KEY CONCEPTS

Author persona The person or voice who speaks through the Web site; a personage that is put on the stage by the designer.

User persona The person of the user or visitor created by the content of the Web site; the role the actual visitor is asked to play when engaging in the communication.

Relationship The relationship between author persona and reader persona, which includes the basic elements of distance and hierarchy.

Face-threatening acts Communicative utterances that threaten the wish of visitors to control their own actions and to be respected for their wishes and values.

Peripheral cues Features that cause positive feelings by association rather than by facts and rational arguments.

1 DESIGNING A CREDIBLE AND INVITING AUTHOR PERSONA

1.1 Consider the presence of the author persona.

Key decisions

- ◆ Should the author persona be anonymous or identifiable?
- ◆ Should the author persona have a strong presence?
- ◆ Should peripheral cues be used to reinforce the author persona?

1.2 Consider the role(s) of the author persona.

Key decisions

- ◆ Which role(s) will the author persona take?
- ◆ Will the author persona take one or more roles?
- ◆ How will the role(s) be prompted?

1.3 Consider the values of the author persona(s).

Key decisions

- ◆ Which of the organization's values should be emphasized?
- ◆ How explicitly should these values be presented?

2 DESIGNING PLAYABLE AND ATTRACTIVE USER PERSONAS

2.1 Define the role(s) of the user persona(s).

Key decisions

- ◆ What role(s) should the user persona have?
- ◆ Which goals should the user persona have?
- ◆ How should the user persona(s) be prompted?

2.2 Consider the values to be attributed to the user-persona.

Key decision

Should values be expressed directly or indirectly?

3 DESIGNING COMFORTABLE RELATIONSHIPS

3.1 Consider the distance between author and user personas.

Key decisions

- ◆ How familiar should the tone be?
- ◆ How hierarchical should their relationship be?

3.2 Consider politeness.

Key decisions

- ◆ How can you avoid unnecessarily strong face-threatening acts?
- ◆ How can you compensate for face-threatening acts with politeness? **TC**

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