What is a persona?

Personas are archetypal users that represent the needs, goals, values, and behaviors of larger groups of patrons. Acting as stand-ins for real users, personas are tools that help guide design teams in making decisions about the functionality and design of software. By identifying patrons’ behaviors and what drives them, personas bring users to life by giving them names, personalities, and faces. While these personas are fictitious, they are based on the behaviors of real patrons -- information derived from the careful analysis of 78 user needs assessment interviews.

How are personas helpful?

Understanding the needs of users is critical to the success of any project. Personas will help us to identify and communicate user needs efficiently and effectively. Prioritizing development and design based on personas will help the Post-Horizon Working Group avoid the trap of building what we think users want, freeing us to design a discovery tool by considering what patrons use and value. As development proceeds, many disagreements over design decisions can be sorted out by referring back to the personas. Additionally, we can frequently evaluate designs using the personas.

Who are our personas?

The following pages introduce you to six personas meant to represent major patterns of work in our community: the Data Cruncher, the Guide, the Browser, the Simplicity Seeker, the Complex Searcher, and the Advice Seeker. While this set of personas cannot represent every user trait, and every user in our population may not fit neatly into one of these categories, we do know that the traits described in these personas are reflective of major trends across our user base.

How did we develop these personas?

Interviews conducted with 78 JHU affiliates in the spring of 2008, prompted the interviewee to walk the interviewer through a recent instance they needed to find resources or information. Followup questions ascertained typical and preferred discovery behaviors, organization and sharing habits, and related behavior.

The entire User Needs Assessment Team did a first round of data presentation to prepare the interview transcripts with a provisional set of codes. Team members identified themes that corresponded to several persona components and identified the portions of interview transcripts that corresponded to these themes.

The smaller analysis team then read each transcript, identified patterns within themes, and then identified clusters of themes in order to segment users. These clusters became the basis of the personas that follow. This analysis and writing was resource-intensive: the multiple readings, codings, analysis, and drafting took an estimated 125 hours following the initial data presentation.

Credit and Caveats

These personas represent one deliverable from the User Needs Assessment project of the Public Interface Group. More complete analysis and a final report are pending.

These archetypes are based on behaviors and habits, not on role (eg. student, faculty, etc.) or discipline (eg. humanities, engineering, etc.). The team should not make generalizations about roles or disciplines based on the personas roles and disciplines.

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How can the Post-Horizon Working Group use the personas?

By referring to personas as ‘stand-in’ users, the team can concentrate on designing for these archetypal users with the confidence that the needs of the broader user groups will be met. As the personas are based on real user interviews, this will help ensure the team has a tool for data-driven decision making. Specifically, the team might use the personas to:

- Assist evaluation of a short list by mapping key features to user needs
- Communicate to HILTS and the ULC how the product will meet user needs
- Make design decisions about how specific functionality will work
- Focus additional user analysis activities, such as task analysis
- Develop scenarios for usability testing
- Assist in recruitment strategy for usability testing

One challenge teams often face is remembering to hold themselves accountable for considering personas and data derived from assessment activities when strong feelings about a product or process exist in the team itself. To help ameliorate these tendencies, we recommend considering the below techniques:

- Posting the personas around the walls of the room the team meets in as a visual reminder to include them in your process
- Develop a mantra such as “What would Ryan do/think?” to incorporate the personas in the evaluation activities and decisions of the team
- Assign a point person on the team to keep the team honest when the data-driven aids are neglected in favor of assumptions.
- Develop an evaluation tool that incorporates the earlier team work on features with the behaviors and features described in the personas
Joan

Data Cruncher

“The library has been an integral part of my research; I use their website and resources daily.”

Joan is a physicist who makes heavy use of data from subscription and classified sources. She also has robust methods for organizing and managing the information that she uses. To support this organization, she relies on seamless exporting from the discovery systems she uses to RefWorks, email, RSS, and other options.

Strategies and Habits

Joan works with a team studying acoustical physics and is constantly searching for useful data and known physics information to support the research. She does her research online, using Internet Explorer. She uses the library’s website to link to resources and will often search INSPEC, ScienceDirect, Science Citation Index, and other subject-specific websites, databases, and e-journals. The library’s website is a key component of her research, and she generally feels confident about her search skills and rarely requires assistance.

She relies on the recommendations and reviews from colleagues and scientists on some websites and databases to determine if the information is relevant and useful. She also searches for classified and government-funded information that is important for her work. She prefers researching and reading on the computer and gets frustrated when information isn’t available online.

Joan also occasionally searches for information for herself—typically, background information on concepts related to her research and personal scientific interests. Searching Wikipedia usually suffices and provides the basic, quick information she needs.

Organization and Sharing

The information she finds for herself is stored and organized in files on her PC desktop. When Joan finds information that is useful for the team, she either emails it to her colleagues or posts it online on the team’s SharePoint site. Later, when the team writes reports for the sponsor of the work or papers to publish in scholarly journals, they use RefWorks, a bibliographic management software, because of the ability to take notes and create bibliographies.

When she isn’t actively searching for information, she prefers to have recently published research pertaining to her work and interests sent to her via email or RSS alerts.
Donald
Guide

“Students are so distractible. It is good to have qualitative pointers.”

Donald is a faculty member in the Carey Business School. He researches management and organization development in corporate settings and teaches classes every semester. He uses a variety of scholarly and other types of resources in both his research and teaching, including news, DVDs, online video, scholarly articles, and data. He spends quite a bit of energy emphasizing quality sources and critical evaluation skills to his students.

Strategies and Habits

Depending on what he is looking for, he begins his research in different places. When looking for information outside his field of specialty, he starts at Google Scholar or Google to keep things simple and broad. For his own work, he begins with the database list for Business and frequently uses ABI/Inform, Business Source Premier, Business and Management Practices, and LexisNexis. He frequently uses the e-journals lookup page to get right to individual journals. In general, he prefers browsing online and making use of “more like this” features to get to the right articles and documents. He publishes in management journals, magazines, and teaching-oriented newsletters.

In his own work and when guiding his students, he tries to underscore checking for bibliographies and evaluating the reputation of a source. He advises students to look for peer-reviewed content for research and wants them to know how to critically evaluate the source of a news report or video.

He appreciates help when it is offered and values anything that can help him get things done quickly since balancing research and teaching requires a lot of time. He gets frustrated when things seem to take too many steps. Because both he and his students work from off-campus a great deal of the time, seamless remote access is a priority for him on both his laptop and Blackberry to avoid wasted time, confusion, and frustration.

Organization and Sharing

When he finds something he wants to save or remember, he adds the page to his Internet Explorer Favorites. In a database, he usually saves a list of items from a search and emails it to himself. He frequently copies articles to distribute to classes or posts documents online in Blackboard. Being able to initiate easy physical and virtual delivery of items is important to him since he sometimes has items sent to Downtown Center or near where he lives in Montgomery County.
Candace

Browser

“The trail that I end up following is often not the one I started down.”

Candace is a graduate student in Musicology, studying at the Peabody Institute. She studies history and analysis of 19th-century opera and also plays the piano. Her preferred strategy to find new sources for reading, listening, and viewing is to happen upon them either by physically browsing materials or exploring and following links online.

Strategies and Habits

She knows the library stacks well in her areas of study and spends a bit of time every semester scanning the shelves for new works that interest her. She recently shifted the focus of an article she was writing after she saw an interesting book on the new books shelf at the library. She also frequently buys books, recordings, and DVDs on Amazon, and she finds the “more like this” suggestions and other suggestions helpful. She recently discovered the search inside a book through Google or Amazon: this delighted her and now she uses this feature frequently before coming to find known items in the catalog. She frequently searches titles she first notices on Amazon in the library catalog to check them out; she places interlibrary loan requests for items the library doesn’t have. She also searches music indexes linked to from the Friedheim Library website.

Using the library catalog to find printed music, recordings, and DVDs frustrates Candace. She often needs to find known editions or recordings of musical works, and feels that there isn’t an easy way to do this in the catalog. She relies on information about publishers, known performers, and conductors to decide which materials to use. She is working on a new piano sonata and will need to make sure she finds scores from definitive publishers and recordings of several interpretations to study. She isn’t completely familiar with the composer, so will likely look him up in Grove Online and the ML 410 area in the stacks as she gets started.

In general, when finding information and publications for her own research or teaching, she is not entirely sure of her own skills or knowledge. She is not confident that she’s doing things the right way and sometimes worries about missing sources.

Organization and Sharing

When she finds articles or citations that are relevant to her interests, she uses FindIt to get the full-text, prints them out, and organizes them in folders based on topic or composer. Candace would like to be alerted when the library gets new musicology books or new recordings. She’d also like to know when new things are published so she can know she’s not missing out.
Ryan
Simplicity Seeker
“Google is my starting point for pretty much everything.”

Ryan is a sophomore majoring in Political Science. He likes his research to work simply and take the least amount of time possible. In the past, he has been overwhelmed by all of his options as well as frustrated by access issues related to being off-campus—having to login multiple times and not knowing when he’ll be able to find full-text online.

Strategies and Habits
He finds the library website frustrating and usually goes to Google first to begin looking for sources. He likes the simplicity of searching Google and likes the clean and appealing interface. Aesthetics are important to him: he’ll spend more time using tools that are nice to look at. There, he scans the search results quickly, noting relevant information and words in the blurbs and snippets returned under each search result. He prefers to search quickly and simply, entering a few keywords one after another and hitting go. He’ll keep clicking until he’s found what feels like enough information. In general, he tries to figure out if a source has a good reputation or comes from someone worth citing before he uses it for schoolwork, but it isn’t always obvious.

Most of his classes have begun to require a significant amount of paper-writing. He has heard of JSTOR from a friend and might use it for his work, but he is not sure how to find other sources he should be using. Sometimes he uses the library catalog; he finds it frustrating because he prefers to have a one-box approach to searching, and he’d like it to correct his spelling. He also wonders why the library catalog doesn’t seem to return the most relevant items first, and is turned off by the idea that it doesn’t work well. He gets background information on new topics from Wikipedia.

Organization and Sharing
When he finds something he wants to read or save, he usually prints it out so he doesn’t lose it. If he’s working on his own computer, he saves PDFs to save for later. He likes it when a catalog or database includes a simple citation that he can copy and paste into his bibliography. He writes papers, takes notes, and creates bibliographies in Word. He has experimented with a few options for quick bibliography creation, including Zotero for Firefox, RefWorks, and Papers for Mac. He found RefWorks complex and difficult to drop in and use without knowing more about it.
Anthony

Complex Searcher

“I like to perform structured searches so that my results are more targeted to my needs.”

Anthony is a professor of Biomedical Engineering. He researches human tissue engineering and teaches courses in biomaterials. In his faculty role, he oversees the work of graduate students and collaborates with other researchers. To support his research, he prefers to go about searching for information and materials in highly structured, often complex ways.

Strategies and Habits

Anthony spends a lot of time researching to support his teaching and studies. He has the library’s database lists for biology and engineering bookmarked in his browser (although he admits that the library’s website frustrates him) and almost always uses them to lead him to known useful resources, like subject-specific databases such as PubMed, EMBASE, and e-journal collections.

He prefers to leverage the advanced searching capabilities the databases tend to offer, such as limiters/filters, fielded searching, and classification schema and feels that he is an effective searcher. He also likes saving reference lists and searches in the databases and e-journal collections to go back to later. Although it doesn’t offer as complex search options, he occasionally searches Google to find quick information. In all instances of his online research, he is disappointed when information is not available full-text online.

Much of the material Anthony finds useful comes from peer-reviewed scholarly journals; though he also, on occasion, tracks down books cited in those articles, laboratory protocols, or handbooks. When he searches for books, he often uses the library catalog or WorldCat to search for the items, typically by author. Because he finds the library catalog’s results lists and records difficult to use, he sometimes uses Google Books instead.

When he finds information that may be useful to him during his teaching or writing, he gauges the author’s or publisher’s reputation in the field to be sure he wants to be referencing it in his work. It annoys him when he cannot get access to an article or book through the library, but in those cases he uses interlibrary loan.

Organization and Sharing

He saves the information he gets in one of two ways: he saves a print copy in the filing cabinet in his office or saves it directly to his computer. He finds desktop searching a useful means to find the information he has saved.

When he needs to share documents with students, colleagues, and research collaborators, he emails or posts them to JShare.
Asha is a junior studying English, while taking classes in a variety of different other departments. She prefers to begin her work by consulting someone with expertise, such as a librarian or professor.

**Strategies and Habits**

Asha is confused about library tools and resources and feels overloaded by the amount of information. She also lacks clarity about the research process and is not confident about her own research skills. Because of this, when she starts a new paper, she first seeks the guidance of the English department’s liaison librarian, and she plans to do this for an upcoming 25-page paper. Then, on her own time, she searches the advised subject-specific databases and e-journal collections; she will sometimes use the library’s webpages and aids, along with Google and Wikipedia, to find other resources beyond those identified by the librarian. She occasionally uses JHSearch because she likes the idea of searching across multiple databases at one time but tends to find it frustrating. Along with the online resources, Asha uses the library catalog for print resources and books but thinks catalog searching is confusing because she doesn’t understand what subject headings, keywords, and other search fields are. When she uses it alone, she wishes it offered tips or cues for using it more effectively. She also accesses and prints electronic reserve readings for her courses.

Asha usually needs to find a combination of books and journal articles for her papers. She pays attention to the URLs, scholarly nature of the resources and publications, and the tables of contents of the books to ensure she is citing relevant and useful resources in her papers and projects. Since she often does schoolwork while she is in coffee shops, she is sometimes impeded by problems with access to the online subscription resources and tools. She is also stymied when full-text online access is not available.

Asha also uses the library recreationally and often asks a librarian for help finding movies since she also has trouble searching and browsing for DVDs in the catalog. She’d like to be able to check the catalog using her mobile phone to see if a movie is available before she goes to the library.

**Organization and Sharing**

When she finds sources useful for her class projects, she prints/copies them or emails them to herself to use them later when she is writing. When she finishes the research and gets to writing, she takes notes and creates bibliographies using Microsoft Word. If she needs to share documents with classmates or professors, she emails them.