CS7026 – Website Assignment

The Importance of the User
Process of Requirements Elicitation - The Importance the User

- Who are my users?
- What are my users trying to accomplish?
- How do my users think about what they’re trying to accomplish?
- What kind of experiences do my users find appealing and rewarding?
- How should my website behave?
- What form should my website take?
- How will users interact with my website?
- How can my website’s functions be most effectively organized?
- How will my website introduce itself to first-time users?
- How can my website put an understandable, appealing, and controllable face on technology?
- How can my website deal with problems that users encounter?
- How will my website help infrequent and inexperienced users understand how to accomplish their goals?
- How can my website provide sufficient depth and power for expert users?
The demands that users place on digital products vary considerably with their experience.

Nobody wants to remain a beginner!
Example: Experience

- A well-designed Web site interface should help its user become quickly familiar and comfortable with navigation and functionality.

- Even a customer who has visited your site several times before and may be familiar with what you offer and with Web interaction idioms in general, may not visit your site frequently enough to memorize organisational constructs.

- This increases the importance of making interactions on your site as transparent and discoverable as possible.

- Consider providing an adaptive experience by tracking user actions on a Web site (use cookies to identify a new visitor and to provide unobtrusive orientation assistance for the first few visits to the site).
Understanding your user

- Qualitative and Quantitative Research

- Quantitative – good for numbers – how many…? What age? What gender?

- Qualitative –
  - Attitudes, and aptitudes of potential users.
  - Technical, business, and environmental contexts - the domain - of the website to be designed
  - Vocabulary and other social aspects of the domain in question
  - How existing sites are used
Understanding your user

- Qualitative research can also help the progress of design projects by:
  - Providing credibility and authority to the design team, because design decisions can be traced to research results
  - Uniting the team with a common understanding of domain issues and user concerns
  - Empowering management to make more informed decisions about product design issues that would otherwise be based on guesswork or personal preference
Understanding your user

- Qualitative methods can provide useful answers to important questions that lead to better design:
  - How does the website fit into the broader context of people’s lives?
  - What goals motivate people to use the site, and what basic tasks help people accomplish these goals?
  - What experiences do people find compelling? How do these relate to the site being designed?
  - What problems do people encounter with their current ways of doing things?
Types of qualitative research

- Literature review
- Stakeholder interviews
- Subject matter expert (SME) interviews
- User and customer interviews
- User observation/ethnographic field studies
- Product/prototype and competitive audits
Understanding your user

- Literature review
  - Product marketing plans, brand strategy, market research, user surveys, technology specifications and white papers, business and technical journal articles, competitive studies
  - Web searches for related and competing products and news,
  - Usability study results and metrics
  - Customer support data such as call centre statistics.

The design team should collect this literature, use it as a basis for developing questions to ask stakeholders and SMEs, and later use it to supply additional domain knowledge and vocabulary, and to check against compiled user data.
Understanding your user

- **Stakeholder interviews:**
  - Stakeholders are key members of the organization commissioning the design work.
  - Typically include executives, managers, and representative contributors from development, sales, product management, marketing, customer support, design, and usability.

- **To find out:**
  - Preliminary product vision
  - Budget and schedule
  - Technical constraints and opportunities
  - Business drivers
  - Stakeholders’ perceptions of the user
Understanding your user

- Subject matter expert (SME) interviews

  - Similar to stakeholders, SMEs can provide valuable perspectives on a product and its users.

  - However designers should be careful to recognize that SMEs represent a somewhat skewed perspective.
    - Often expert users.
    - Knowledgeable, but they aren’t designers.
    - Necessary in complex or specialized domains.

  - You will want access to SMEs throughout the design process.
Understanding your user

- Customer interviews
  - Don’t confuse users with customers

- Important to understand customers and satisfy their goals in order to make a product *viable*.

- Also important to realize that customers seldom actually use the product themselves, and when they do, they use it quite differently from the way their users do.
Understanding your user

- When interviewing customers, you will want to understand:
  - Their goals in purchasing the product
  - Their frustrations with current solutions
  - Their decision process for purchasing a product of the type you’re designing
  - Their role in installation, maintenance, and management of the product
  - Domain-related issues and vocabulary
Understanding your user

- **User Interviews**
  - The main focus of the design effort

- Information we are interested in learning from users includes:
  - When, why, and how the site is or will be used
  - Domain knowledge from a user perspective: What do users need to know to achieve their goals?
  - Goals and motivations for using the site
  - Mental model: how users think about their jobs and activities, as well as what expectations users have about the product
  - Problems and frustrations with current products (or an analogous system if no current product exists)
Understanding your user

- **User observation**
  - Combining interviewing and observation, allows designers to ask clarifying questions and direct inquiries about situations and behaviours they observe in real time.

- **Product and competitive audits**
  - Examine any existing version or prototype of the site, as well as its chief competitors.
  - Doing so gives the design team a sense of the state of the art
Target Audience - Personas

- A persona is a way to model, summarise and communicate research about people who have been observed or researched in some way.

- A persona is depicted as a specific person but is not a real individual; rather, it is synthesised from observations of many people.

- Each persona represents a significant portion of people in the real world and enables the designer to focus on a manageable and memorable cast of characters, instead of focusing on thousands of individuals.

- Personas aid designers to create different designs for different kinds of people and to design for a specific somebody, rather than a generic everybody.
Personas

- Use your research to construct user models or Personas.

- Personas are composite archetypes based on behavioural data gathered from the many actual users encountered in the research phase.

- In order to satisfy a diverse audience of users, logic might tell you to make it as broad in its functionality as possible to accommodate the most people.

- This logic, however, is flawed. The best way to successfully accommodate a variety of users is to design for specific types of individuals with specific needs.
Personas are represented as individual people

- The key to this approach is first to choose the right individuals to design for - those users whose needs best represent the needs of a larger set of key constituents.

- Although personas are depicted as specific individuals, because they function as archetypes, they represent a **class** or **type** of user of a specific interactive product.

- A persona encapsulates a distinct set of behaviour patterns, which are identified through the analysis of interview data, and supported by supplemental quantitative data as appropriate.

- These patterns, along with specific motivations or goals, define our personas
Personas are represented as individual people

- Personas are user models that are represented as specific, individual human beings.

- They are not actual people but are synthesized directly from observations of real people.

- This is appropriate and effective because of the unique aspects of personas as user models: They engage the *empathy* of the design and development towards the human target of the design.
Personas are based on research

- Interviews with users outside of their use contexts
- Information about users supplied by stakeholders and subject matter experts (SMEs)
- Market research data such as focus groups and surveys
- Market-segmentation models
- Data gathered from literature reviews and previous studies
Personas must have goals

- Understanding personas is more about understanding motivations and goals than it is about understanding specific tasks or demographics.

- **Experience goals**: how a user wants to feel
- **End goals**: what a user wants to do
- **Life goals**: who a user wants to be
Constructing Personas

1. Identify behavioural variables.
2. Map interview subjects to behavioural variables.
3. Identify significant behaviour patterns.
4. Synthesize characteristics and relevant goals.
5. Check for redundancy and completeness.
6. Expand description of attributes and behaviours.
7. Designate persona types.
Step 1: Identify behavioural variables

- **Activities** - What the user does; frequency and volume
- **Attitudes** - How the user thinks about the product domain and technology
- **Aptitudes** - What education and training the user has; capability to learn
- **Motivations** - Why the user is engaged in the product domain
- **Skills** - User capabilities related to the product domain and technology
Step 2: Map interview subjects to behavioural variables

- This is about figuring out what behavioural variables are most prevalent.

- Some of variables will represent a continuous range of behaviour (for instance, from a computer novice to a computer expert), and a few will represent multiple discrete choices (e.g., uses a smart TV or not).
Step 3: Identify significant behaviour patterns

- Look for clusters of subjects that occur across multiple ranges or variables.

- A set of subjects who cluster in six to eight different variables will likely represent a significant behaviour pattern that will form the basis of a persona.
Step 4: Synthesize characteristics and relevant goals

- For each significant behaviour pattern you identify, you must synthesize details from your data.

- Describe the potential use environment, typical workday (or other relevant context), current solutions and frustrations, and relevant relationships with others.

- Brief bullet points describing characteristics of the behaviour are sufficient. Stick to observed behaviours as much as possible
Step 4: Synthesize characteristics and relevant goals

- One fictional detail at this stage is important: the personas’ first and last names.

- The name should be evocative of the type of person the persona is, without tending toward caricature or stereotype.

- You can also, at this time, add in some demographic information such as age, geographic location, relative income (if appropriate), and job title.

- This information is primarily to help you visualise the persona better as you assemble the behavioural details. From this point on, you should refer to the persona by his or her name.
Step 4: Synthesise characteristics and relevant goals

- Synthesising goals
- By identifying the logical connections between each persona’s behaviours, you can begin to infer the goals that lead to those behaviours.

- You can infer goals both
  - by observing actions (what interview subjects in each persona cluster are trying to accomplish and why) and
  - by analysing subject responses to goal-oriented interview questions
Step 4: Synthesize characteristics and relevant goals

- Goals must always directly relate, in some way, to the product being designed.

- Typically, the majority of useful goals for a persona are **end goals** (3-5).

- **Life goals** are most useful for personas of consumer-oriented products, but they can also make sense for enterprise personas in transient job roles. (0-1)

- General **experience goals** such as “don’t feel stupid” and “don’t waste time” can be taken as implicit for almost any persona. Occasionally, a specific domain may dictate the need for more specific experience goals (0-2).
Step 5: Check for completeness and redundancy

- Check your mappings and personas’ characteristics and goals to see if there are any important gaps that need filling.

- Are any political personas that you need to add to satisfy stakeholder assumptions or requests.

- Each persona must vary from all others in at least one significant behaviour.

- If you find that two personas seem to vary only by demographics, you may choose to eliminate one of the redundant personas or tweak their characteristics to make them more distinct.
Step 6: Expand description of attributes and behaviours

- Your list of bullet point characteristics and goals arrived at in Step 4 points to the essence of complex behaviours, but leaves much implied.

- Third-person narrative is far more powerful at conveying the persona’s attitudes, needs, and problems to other team members.

- This narrative should be no longer than one or two pages of prose.
Step 6: Expand description of attributes and behaviours

- The best narrative quickly introduces the persona in terms of his job or lifestyle, and briefly sketches a day in his life, including peeves, concerns, and interests that have direct bearing on the product.

- Details should be an expansion of your list of characteristics, with additional data derived from your observations and interviews.

- The narrative should express what the persona is looking for in the product by way of a conclusion.
Step 6: Expand description of attributes and behaviours

- When you start developing your narrative, choose photographs of your personas. Photographs make them feel more real as you create the narrative and engage others on the team when you are finished.
Step 7: Designate persona types

- Prioritise your personas to determine which should be the primary design target.

- There are six types of persona, and they are typically designated in roughly the order listed here:

  1. **Primary** - a single persona from the set whose needs and goals can be completely and happily satisfied by a single interface without disenfranchising any of the other personas.
Step 7: Designate persona types

2. **Secondary** - mostly satisfied with the primary persona’s interface but has specific additional needs that can be accommodated without upsetting the product’s ability to serve the primary persona.

3. **Supplemental** - needs are completely represented by a combination of primary and secondary personas and are completely satisfied by the solution we devise for one of our primaries.
Step 7: Designate persona types

4. **Customer** - address the needs of customers, not end users

5. **Served** - not users of the product at all; however, they are directly affected by the use of the product. Provide a way to track second-order social and physical ramifications of products

6. **Negative** - specific types of users that the product is not being built to serve. They aren’t users of the product. Their use is purely rhetorical: to help communicate to other members of the team that a persona should definitely not be the design target for the product.
When rigorous personas aren’t possible: Provisional personas

- Rhetorical tools to clearly communicate assumptions about who the important users are and what they need, and to enforce rigorous thinking about serving specific user needs (even if these needs are not validated).

- Rely on available data and designer best guesses about behaviours, motivations, and goals.

- Typically based on a combination of stakeholder and subject matter expert knowledge of users (when available), as well as what is understood about users from existing market data.
Provisional Personas

- Using provisional personas yields better results than no user models at all.

- Can help focus the product team and build consensus around product features and behaviours.

- Caveats: if you do not have data to back up your assumptions you may:
  - Focus on the wrong design target
  - Focus on the right target, but miss key behaviours that could differentiate your product
  - Have a difficult time getting buy-in from individuals and groups who did not participate in their creation
  - Discredit the value of personas, causing your organization to reject the use of personas in the long term
Provisional Personas

- If you are using provisional personas, it’s important to:
  - Clearly label and explain them as such
  - Represent them visually with sketches, not photos, to reinforce their provisional nature
  - Try to make use of as much existing data as possible (market surveys, domain research, subject matter experts, field studies, or personas for similar products)
  - Document what data was used and what assumptions were made
  - Steer clear of stereotypes (more difficult to do without field data)
  - Focus on behaviours and motivations, not demographics
What Does A Persona Look Like?

Jill Anderson

"I'm looking for a site that will simplify the planning of my business trips."

Bio

Jill is a Regional Director who travels 4-8 times each month for work. She has a specific region in which she travels, and she often visits the same cities and stays in the same hotel. She is frustrated by the fact that no matter how frequently she takes similar trips, she spends hours of her day booking travel. She expects her travel solutions to be as organized as she is.

Goals

- To spend less time booking travel
- To maximize her loyalty points and rewards
- To narrow her options when it comes to shopping

Frustrations

- Too much time spent booking - she's busy!
- Too many websites visited per trip
- Not terribly tech savvy - doesn't like the process

Personality

<table>
<thead>
<tr>
<th>Extrovert</th>
<th>Introvert</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sensing</td>
<td>Intuition</td>
</tr>
<tr>
<td>Thinking</td>
<td>Feeling</td>
</tr>
<tr>
<td>Judging</td>
<td>Perceiving</td>
</tr>
</tbody>
</table>

Motivations

- Price
- Comfort
- Convenience
- Speed
- Preferences
- Loyalties/Rewards

Brands

- KAYAK
- Basecamp
- Outlook
- Enterprise
- IHG

Technology

- IT & Internet
- Software
- Mobile Apps
- Social Networks

https://xtensio.com/user-persona/
What Does A Persona Look Like?

<table>
<thead>
<tr>
<th>Name</th>
<th>Function</th>
<th>Traits</th>
<th>Goals</th>
<th>Scenario</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brian</td>
<td>Student</td>
<td>• Computer Geek - technically savvy</td>
<td>• Organize documents and friends by groups easily</td>
<td>Brian is a busy guy with a lot of online friends and projects. He suggests using a cloud collaboration tool to his schoolmates to work on their projects. They are exchanging, editing and saving multiple file types. Brian is online at all hours and wants to see who on his team is available for chat from his cloud homepage.</td>
</tr>
<tr>
<td>Rachael</td>
<td>Teacher</td>
<td>• Computer user - mostly for work</td>
<td>• Access documents from different locations</td>
<td>Rachael starts working on a presentation from her home computer for a lecture she is giving out of town. She needs to make a change to the document from the home business center's computer. Once all her home page, she is reminded of a deadline by looking at her calendar. She receives a document from her boss and follows the notations inside of the document. She makes a change and emails it back.</td>
</tr>
<tr>
<td>Lars</td>
<td>Artist</td>
<td>• Computer user for entertainment, music, photos</td>
<td>• Have media and files backed up securely without effort</td>
<td>Lars has just imported 200 pictures to his home computer from his camera to his local cloud folder. He logs into his homepage and he can see that he has 10 MB left of free storage. Later, he wants to show a friend his pictures from his phone.</td>
</tr>
</tbody>
</table>

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What Does A Persona Look Like?

- While a persona is usually presented as a one-pager document, it is more than just a deliverable — it is a way to communicate and summarize research trends and patterns to others.

- This fundamental understanding of users is what’s important, not the document itself.