Application Leaders Should Take the Lead in Creating and Managing Personas

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Personas have become a proven process that can improve the value of software to the organization through increased relevance in user experience design. They require effective management by application leaders, who should start creating personas by examining the enterprise’s established software.

Impacts

- The growth of well-defined personas in consumer software is putting pressure on enterprise IT application teams to apply them in their user-facing software projects.
- The absence of clear organizational ownership for personas in internal-facing systems will cause application leaders to take overall responsibility for persona management.

Recommendations

- Begin to create personas by examining the enterprise’s existing solutions.
- Initially, avoid using more than eight personas per application project, unless it’s absolutely necessary.
- Prioritize identified personas; then find a high-impact solution for a high-priority persona. This can also be achieved by using personas for broader IT initiatives.
- Manage the life cycle of personas like any other enterprise asset. This should include assessing software to support persona management.
- Engage digital/user experience design agencies as active participants in persona identification and modeling efforts, as well as in broader-scope UX process definition.
Analysis

A persona is an abstract characterization of an individual used as a proxy for a target audience in relation to an application or portfolio of apps. Designers, product managers and engineers increasingly use personas to guide the creation of engaging, contextually valuable solutions. Personas are a common and successfully used approach in the user experience (UX) design community, although they are relatively new in enterprise IT environments.

Personas focus on the identification of similar patterns of behavior that result in commonly held goals. The combination forms the archetype (see Figure 1 and Figure 2).
Figure 1. Personas Summary

Source: TandemSeven
It is important to recognize that a persona is not a synonym for a:

- **Demographic** — a quantifiable subset of a population usually based on age, gender, ethnicity, language, education, wealth, etc.

- **Market Segment** — a group of consumers that will be most receptive to a product/service and/or an associated marketing campaign.

- **Role** — a description of a set of responsibilities and objectives for an individual function that is linked hierarchically in a broader organizational structure.

Data from demographic studies, market segment analysis and role descriptions are regularly used in the creation of personas. However, it is the focus on behavior and goals that differentiates the persona as a distinct entity. Personas can be viewed as an extension of market segmentation models, such as Strategic Business Insights (SBI) VALS or Nielsen Prizm. These models segmented a population by demographic, psychographic and behavioral attributes, and used colorful names
(Beltway Boomers, Country Casuals, Survivors, etc.). However, these models lacked individuation (personal names) and application-specific behavioral attributes. Despite some marketing professionals using the term "persona" to refer to these market segmentation models, they are not the same thing. Personas were invented by software designer Alan Cooper to serve in the UX design process.

There are many different approaches used to describe individual personas or to categorize groups of related personas. Persona descriptions commonly include illustrative pictures and fictional names that make them tangible to designers and developers. The way personas are documented is not the most important thing to focus on.

Recognize that personas are means to an end. The end is to make sure that the solution is directed toward people’s goals. Designers blend behavioral categorizations and associated goal descriptions against a contextual backdrop (e.g., the availability of a mobile device) to create scenarios. Personas enable designers to internalize clusters of implicit requirements, that would otherwise need to be explicitly documented (and ignored, because designers won’t necessarily read functional specs closely). These scenarios then form the backbone of an initial solution design specification. This is also good for making complex situations more comprehensible to upper management and others not steeped in application nuances.

Second, although personas are approximations, they are not derived from guesswork, anecdotes and personal biases. Personas are crafted through the careful analysis of primary and secondary sources, including ethnographic insight arising from direct observation of people and data on their usage patterns extracted from existing products.

It's best to see personas as indispensable steps in a broader journey, rather than as a destination. They are steps application leaders in the enterprise will need to be taking very soon (see Figure 3). Also, they are just one technique, albeit an important one, in the repertoire of the UX designers. A mature, user-centered design process uses personas, user journey maps and card-sorted taxonomies for navigation, as well as relies on objective data about user behavior obtained by telemetry and analytics. The use of personas in conjunction with these other design techniques is a powerful combination.
### Impacts and Top Recommendations

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Source: Gartner (September 2013)

### Impacts and Recommendations

The growth of well-defined personas in consumer software is putting pressure on enterprise IT application teams to apply them in their user-facing software projects.

Personas have emerged because demographic, market segment and role descriptors do little to help project teams understand why people will want, or how they will ultimately interact with, a particular solution. Also, requirements documents and detailed functional specs become burdensome and hard to follow closely, especially in fast-moving agile projects. Personas enable design teams to communicate more efficiently, because designers can internalize requirements and make decisions quickly, based on implicit aspects and inferred requirements. They also make it easier to prioritize requirements, by stack-ranking clusters of related needs when packaged as persona definitions.

For example, according to CyberCollege, only about 22% of people without a high school education use the Internet, while almost 90% of people with a college education regularly surf the Net. An interesting demographic insight — but it doesn’t help define a specific solution. ComScore has identified that women account for 71% of the money spent in online shopping for apparel and accessories. A clear market segment, but one that is of little value in crafting a specific online apparel site.
On the other hand, take the persona of Carey — a college-educated professional woman who uses her mobile device to buy name-brand clothes (usually at home, but sometimes when catching up over coffee with friends who have children of the same age) at competitive prices (because frugality is seen by her peer group as a virtue) for her two-year-old son, so that she can spend more quality time with her family, rather than waste it on stress-filled shopping trips. The persona provides much greater insight to product designers and developers on what type of solution they should be creating.

Personas have become a standard tool among leading design firms, dating back to 1993 at OgilvyOne, and 1995 at Cooper Design. They are now de rigueur for digital and user experience design agencies and are increasingly key components in the design of enterprise customer-facing websites and mobile applications. It is far less common to see personas used for business-to-employee (B2E) software, particularly with custom-built solutions. Although we have seen some enterprise software organizations undertake persona definition projects, they are only rarely put to meaningful use.

The effects of the consumerization of IT, plus the growing use of direct-to-user business models, are putting the enterprise application leader under increasing scrutiny. What’s emerging is a growing experience gap between the software that IT departments deploy to their employees and what employees use on the Web or on their mobile devices. This gap is being exacerbated when employees see their own organizations make significant improvements with customer experience.

This idea of applying consumer-facing application constructs to employees is one of the core tenets of Gartner’s Engagement Initiative. (See "Use the Engagement Initiative to Respond to Critical Changes in the Workplace."

Enterprise IT organizations should adopt the tactics used by the consumer-facing world, rather than continuing to ignore them. It is a matter of remaining relevant to the requirements of an enterprise in the face of changing market conditions.

Role-based design is a common approach used by enterprise application development teams to become more people-centered. However, role-based design is similar to demographic and market segment data, in that they all have serious shortcomings in accurately describing a meaningful product:

- Roles are based on the requirements of the human resources department. Roles draw distinctions between responsibilities to help human resource management determine salary grades, rather than describe the manner in which a job is performed.
- Roles are too abstract when it comes to the actual performance of a job. Although people may share common roles, they may conduct them in very different fashions, based on environmental factors (e.g., which division you operate in or the style and priorities of your manager).
- Roles are poor at identifying the work people do that doesn't fall strictly within the formal definition of their responsibilities and objectives.
- Roles are ineffective at describing informal interactions that are often critical in task completion.
Properly crafted personas reveal the behaviors and goals underlying the roles people work within. The result can be software that maps closely to the reality of an organization’s workflows and business processes.

That being said, how should the application leader get started? We do not recommend an architectural approach — that is undertaking a special project to craft a comprehensive list of personas (similar to what might be done with roles). The most practical approach is to begin building personas on an application-by-application basis. This is the most common strategy we see undertaken by UX and digital design firms — the experts in the field.

For example, we recently spoke to a public rail service provider that was looking to create a mobile train schedule-planning app. As part of the process, they identified a set of people that would interact with common data and workflows, albeit from different perspectives. These included train controllers, signalers, station staff and customers. This was their baseline. From there, they sought an engagement with UX professionals to further refine these into personas to define the number of discrete apps necessary for each group (i.e., train customers could require one app, signalers and controllers their own, and station staff another).

A common question that arises when organizations start building personas is how many. There is no one right number. However, when an application-by-application strategy is taken, you should expect to have been three to eight personas per project. For most applications in the enterprise, it would be hard to believe that there are less than three. Although there may be more than eight, an important gating factor is the ability of the designers and developers to manage larger numbers in a meaningful way. More personas will emerge through different projects. This will have involve some level of management oversight.

**Recommendations:**

- Start creating personas by examining the enterprise’s software.
- Initially, seek to avoid more than eight personas per application project, unless absolutely necessary.
- Prioritize identified personas; then find a high-impact solution for a high-priority persona. This can be accomplished by personas for broader IT initiatives.

The absence of clear organizational ownership for personas in internal-facing systems will cause application leaders to take overall responsibility for persona management.

Personas are important tools for improving the value of software for users and organizations. As this becomes more commonly understood, we expect more CIOs to push for the creation of personas. Hypothetically, one might argue that it is ultimately the human resources director’s responsibility to provide the management of all employee-centered personas, with marketing owning the customer-facing personas. After all, they essentially oversee role-related information for the organization today.
Practically, the actual responsibility for personas for B2E systems will fall on the application leader. Although CIOs will want to ensure that personas are being created and used, the actual process is at too low a level for them to worry about on a day-to-day basis. Although personas represent the human resources of the organization in new way, the practical value will largely be applied to IT systems, rather than specific human resources processes.

Application leaders will need to own personas for internal-facing systems and their management for the foreseeable future. Furthermore, personas grow more important as IT becomes more complex with consumerization, a move to more knowledge and collaborative work, more work styles, shifting demographics and globalization.

We are specifically using the term "management." Personas are not a "set-and-forget" activity. They do not lend themselves well to an initial flurry of activity to create a poster that's pinned to cubicle walls around the AD team.

As we pointed out, personas are about identifying behavior and goals. Behavior is tightly connected to the surrounding context — a user’s operating environment. When the environment changes, it is likely that behavior will follow. In an enterprise context, environmental change factors can be triggered by reorganizations and restructurings, mergers and acquisitions, a change in government, disruptive innovation either emanating from inside the company or from outside, etc.

Because these conditions are a regular facet of the modern world, personas should be treated as dynamic entities. They will need regular maintenance. In many regards, managing personas is like managing a service-oriented architecture (SOA). Personas will emerge dynamically, there will be overlaps and duplications that need to be reconciled, team members will need to have objectives geared to reuse and, at times, personas will need to be retired. As personas proliferate, coordinating them becomes necessary so they can be reused as assets, even in a highly federated manner.

Application leaders entering the process of persona management must be realistic about the skills of the team. It is commonplace to see ethnographers, sociologists and even psychiatrists involved in associated user studies and analysis workshops used in persona creation and curation. After all these people have the training and expertise to identify behavior traits from the data collected through numerous sources. In the highly likely scenario in which these skills are not readily available within the application development, or broader IT organization, application leaders should be prepared to extend their community of third-party service organizations with UX and digital design firms.

Finally, tools will begin to emerge to support the proactive, ongoing management of personas in the organization. The most notable example is Persona Modeler from TandemSeven. This component of the company’s UX360 product suite manages user research and persona design, as well as creation and maintenance within a rich media repository. It supports collaboration among the UX, technical writing, marketing and product design teams.

**Recommendations:**
Manage the life cycle of personas like any other enterprise asset. This should include assessing software to support persona management.

Seek out relationships with digital/UX design agencies and engage them as active participants in persona identification and modeling efforts.

Gartner Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

"Attributes of a Great Web User Experience"

"Avoid the Shiny-Object Syndrome in Your Mobile Marketing Strategy"

"Software Development for Banking Apps Need a Diet"

"Use the Engagement Initiative to Respond to Critical Changes in the Workplace"