



User Personas and You:

How to apply user information to your work

Presented by Nicole Maron, CMS UX Architect
02/01/2017

What we'll cover today



- What user information and personas are
- Why they are useful
- How we came up with them
- Persona walkthroughs
- Discussion – how to apply them?

Show of hands...



Who here has used personas before?

What is “user info”, anyway?



Any information that we can gather, analyze, and prioritize about users' needs, habits, challenges, etc. which can give us insight into what works for them.

What is the value of user info?



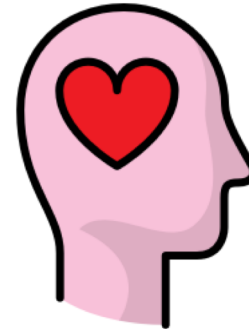
It allows us to understand their experience of our services and technology, and the **impact** our choices have on them.



What is a Persona?



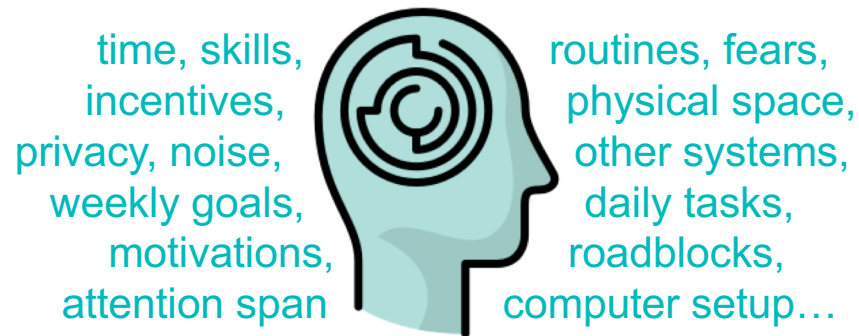
A persona is a **distinctive character** representing a specific user segment.



Why are they necessary?



Without a practice and tools to keep us focused on user perspectives, it's very easy for all of us to **organically and unknowingly** slide into predictable, sub-optimal human behaviors which lead us away from user-supportive decisions.



Personas help us: **Accurately Prioritize**



As creative problem-solvers, we gravitate to problems we *want* to solve, and can let our solutions get away from us.



Personas help focus the right solutions, at the right time, to the right extent.

Personas help us: **Avoid Personal Bias**



Without other evidence, we lean on our own perspective and preferences.

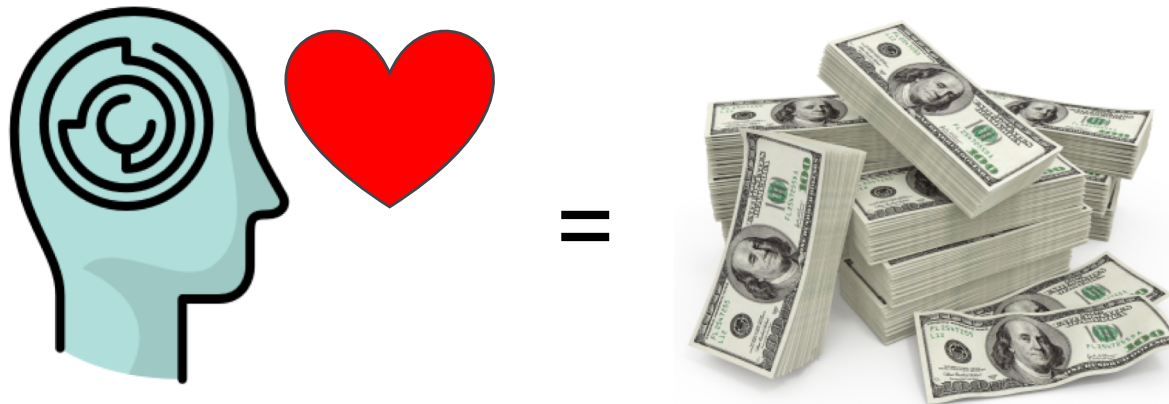


Personas are developed based on research and user behavior expertise.

User perspective is key to ROI



Keeping **their perspective** in mind as we strategize, design, build, implement, and support our products and services = innovating with the correct market in mind = clearer initiatives = better planning = less scope creep = less rework



User perspective is key to morale



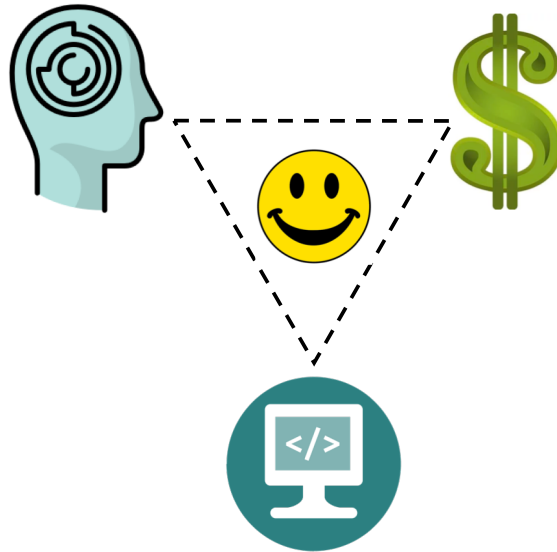
When we feel confident we are making market-appropriate decisions, we feel more engaged and proud of our work.



So users supersede everything?

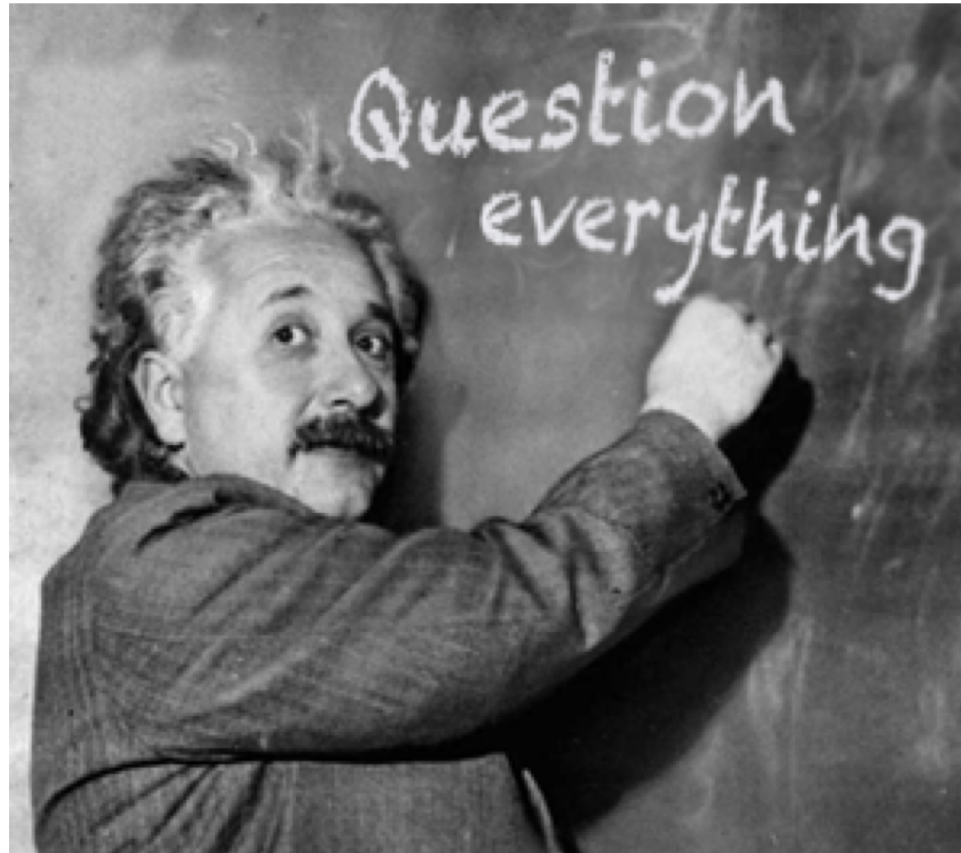


No. Optimal products and experiences **balance** user, tech, and business drivers.



Personas just help give the users a seat at the negotiating table.

Any questions so far?

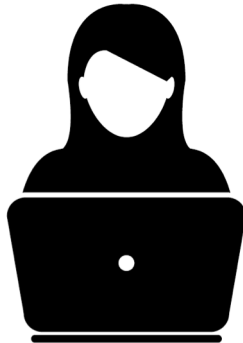


Two types of Role-based Personas



Archetypes (behavior)

Validate interactive elements and user flows at a macro level



Work Manager

TMS user mainly concerned with day-to-day Ops tasks for a single team, or a group of interdependent teams.

Personas (personality)

Build empathy and “in the weeds” perspective and customization



Renee, CSG Manager

Manages all TTS Support, overseeing 4 teams made up of 24 team members spanning two shifts.

How we came up with the TMS Personas



In the past 2.5 years, the UX team has conducted **75+** user-centered research activities which inform them:

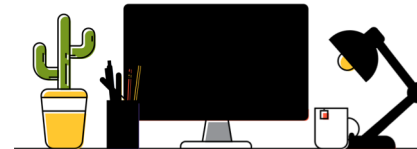


40+ Internal User Interviews

CMS Ops Managers and Team Members, SAMS, Implementation Managers and Team Members

20+ Contextual inquiries

On-site observation of internal users in their workspaces



15+ CMS Product Review Tasks

SME walkthroughs, Product trainings, Task analyses

Time to switch to the pdf



Have another cookie ;)

Next Steps

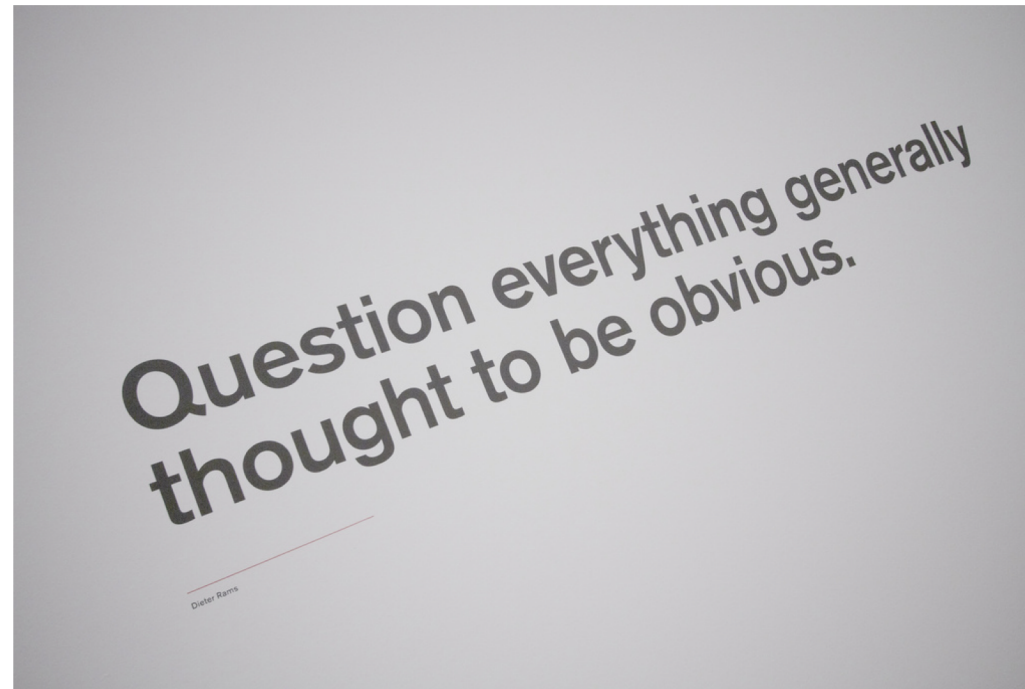


Keep talking with you about what user info helps you

Expand current internal archetype personas into detailed personas

Begin Lender research and persona development

Last Questions (for now)?



Thank you



Please feel free to contact Nicole Maron, Madeline Franke, or George Plendl with any additional thoughts, any time.