Method 5: Creating a persona/storyworld

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Time involved	Preparation, 30 minutes Using the method, 60 minutes
Associated capabilities	Understand value as created in practice Increase the variance/bring in new actors
Methods to use before or after this one	Method 4 Mapping the user experience Method 6 Segmenting by meaning

What you'll need

Masking tape, Post-it notes, Blu-Tack, marker pens

A flipchart

A facilitator to guide the teams

A documenter to capture the results
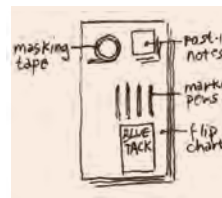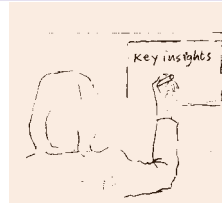
key question

'What is someone's world made up of?'

Purpose

This method helps a group understand the world holistically from the perspective of a user, customer, stakeholder or employee. It helps clarify what his or her world is made up of, allowing the team to share knowledge and identify important patterns.

Outcomes

Gives a team a richer, more rounded picture of individuals they are thinking about in relation to an issue or service. Allows a team to combine data from different sources with their own associations and imaginations. Gives shape to composite characters that provide a focus for other methods.

Preparation

Engage with colleagues who specialize in research to clarify what is known, and what isn't known, about target users, customers, employees or stakeholders (select as required). If you can, make this information available to participants before and in the workshop. Adapt the template to what matters to your issue or organization.

Tip

While facilitating, encourage participants to write down their ideas, getting things out of their heads that might be obvious to them, to share with others.

How to do it

Capture ideas. Invite people to look at your adapted persona template. Ask them to use this format and fill in the detail of the boxes on a large piece of paper, in any order. If data is available from research, then share this and invite people to refer to it. If not, use participants' knowledge, or their imaginations, to create rich, holistic pictures of specific people.

Share and tell. Ask people to share their personas with colleagues.

Reflect. Consider as a group how "real" these people feel. Do you need to add anything to the template structure to capture something important about people's worlds or about their interactions with other people or organizations? Discuss whether users are presented as having needs and/or capacities. If so, what kinds of knowledge, skills or resources do they have? If you have quantitative data about users or customers, how do these personas compare with your data?

Iterate. Invite teams to edit or refine their personas based on feedback from others.

Repeat. Create more personas following the same method. Participants may find it slightly odd at first to jump from person to person, but this can open up their sense of creativity as they begin to bring into view different people you work with or aim to serve.

Synthesize. Stick up all the personas together on the wall. Together, discuss if this feels like an accurate mixture of the people you work with or want to serve. Are there common characteristics? Does anything surprise you? Are there important things missing – for example, have you considered children, older people, people from different cultural, ethnic or national backgrounds, levels of income, or at different life stages? Pick a small set of personas that exemplifies the different profiles of users or customers. Refine these.

Reflection. Does the research you currently have access to help you understand people holistically? How are ventures and services designed right now in relation to the complexity of people's worlds? How might services be different if they were more closely targeted at personas that summarize a segment?

Creating a persona/storyworld

Use this to describe someone in their world

The backstory

My family, study and work background…

Current situation

My name is…My age is…I live in…with…
How and where I spend my time…My work
and income…

Beliefs about change

How I think about the future…

Key insights

Capacities and resources

I can easily…I can't easily…My skills
are…because…

Goals and values

The future I want is…because

Issues and challenges

Workarounds

Strong ties with…

People, places and organizations

" I think/feel/know…"

Devices and technologies

Things I have with or around me (eg car,
TV, mobile phone)…because…

Relationships with organizations

Formal/informal…occasional/frequent

Weak ties with…

People, places and organizations

Example

Volunteer persona/storyworld

Backstory
She graduated from university BA media studies 1 year ago, huge debts, not sure what direction to take, working as shop assistant but considering caring/healthcare

Workarounds
To move on to career next step
- Researching tim-banking & volunteering sites
- Applying for jobs as media assistant
- Thinking of MA study but it's expensive

Beliefs about change
I know I have to make things happen myself but I'm not sure where to start

Insights
- Got some time now, but may not want to volunteer for more than a year
- Tech/phone/camera/TV skills, to connect with friends + music + going out
- Not used to older people's company

Goals & Values
I want to do something meaningful

TERRI age 23

Strong ties
Friends, own family, sports club

Weak ties
Where she lives, it's just temporary, not much contact with older people

"I don't know what I have to give an older person, but I can see volunteering might give me experiences that might help me find work"

Devices/tech
Smart phone, PAYG tariff, Facebook, Instagram, WhatsApp, Spotify

Organisations
Not many organisational connections, not much work experience, but has university networks.

3 Behaving and experiencing