



DISCOVER PHASE / Joint Activity

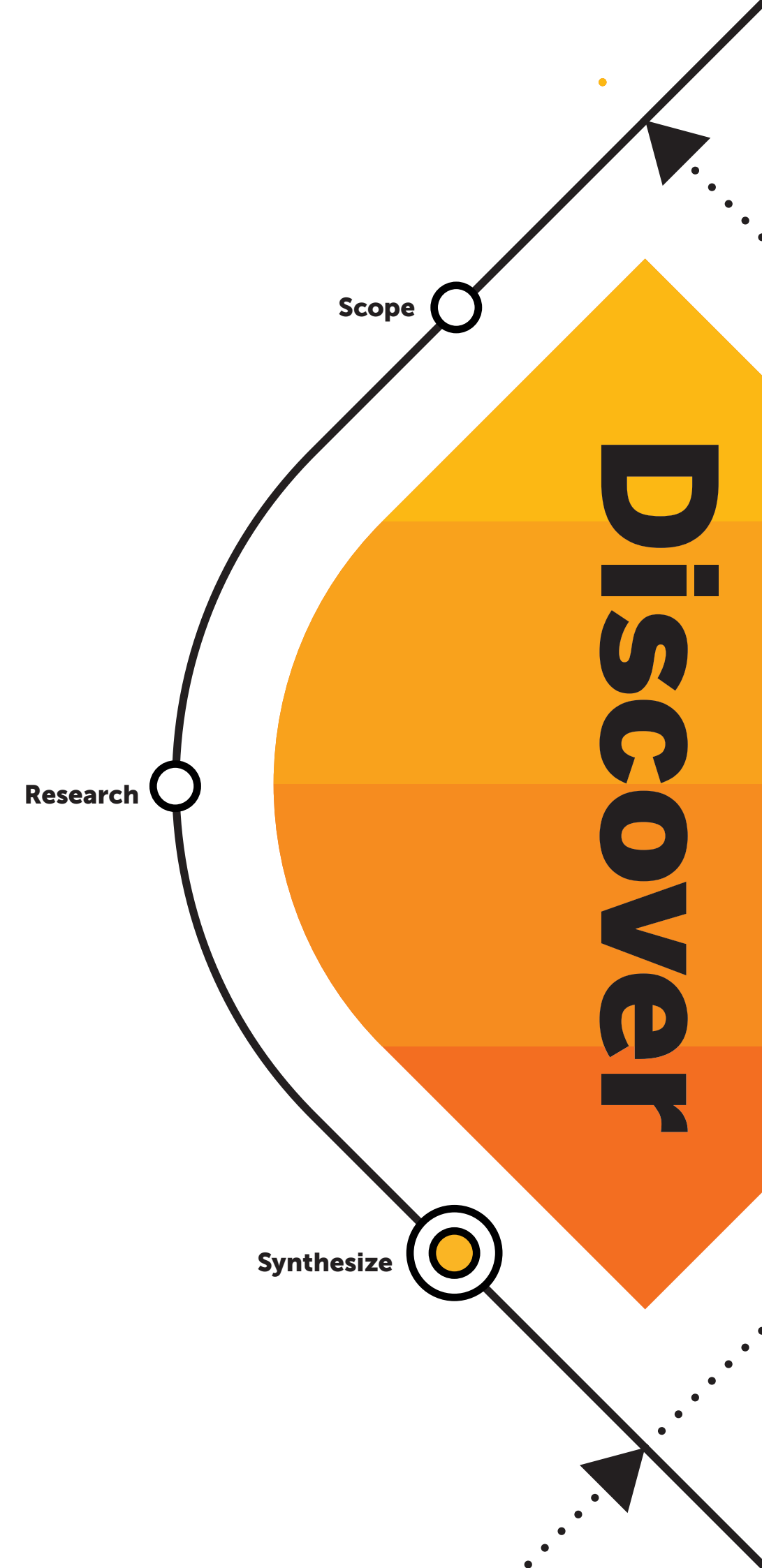
# Persona

Create an archetype of your users from end user interviews to guide future design decisions.

# Why to use a Persona

Personas are archetypes of your users that you develop based on research interviews. They include goals, desires, tasks of the users.

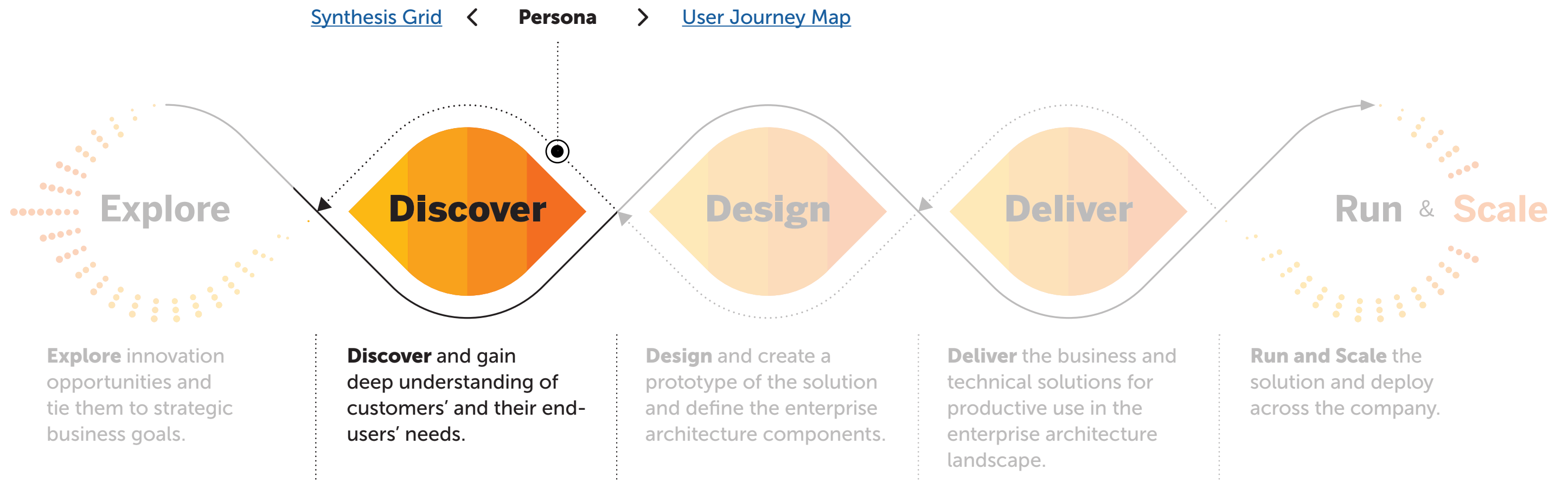
Personas help to guide future design decisions. They give a human face to an otherwise abstract data. They further help the team to have a common understanding of the end users.



# When to use a Persona

We use Personas to articulate a specific target user for the given challenge in the Discover Phase. Personas can be crafted based on the responses from interviewers on their needs and goals. Goals can be experiential or professional.

They can also be short-term and long-term goals. Explicating these helps the team to inform design decisions as the project progresses. A well-crafted persona works like a North Star for a team to guide their decisions.



Lear more about SAP's Human-Centered Approach to Innovation: <https://experience.sap.com/designservices/approach>

# How to use a Persona



Duration  
**15–30 Minutes**



Participation  
**3–5 People**



Roles  
**Designers, Business Leads**



Use Input From  
• **Interviews**

## Steps

- 1** Include typical characteristics of users: face, name, age, educational background, etc.
- 2** In context of the design challenge, describe:
  - What is their role?
  - What is the goal they are trying to achieve?
  - What are the tasks to achieve the goal?
  - What are the triggers for those tasks?
  - How frequently do they complete those tasks?
- 3** Describe likes and dislikes.
  - What does the Persona like?
  - What frustrates the Persona?
- 4** Visualize what you collected:
  - Draw a portrait of your persona.
  - Describe or sketch what their environment looks like.

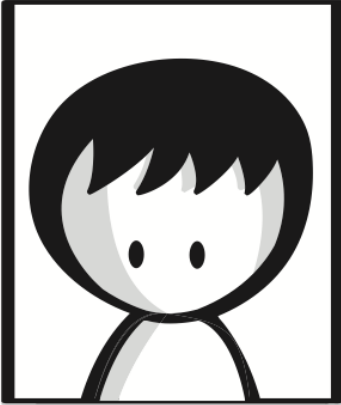
## Expert Tips

Knowledge about the users within the use case is a prerequisite in order to leverage this tool.

# Example Persona

**Persona:** Michael,  
29-year-old forklift  
operator.

Demographics
Activities



**My Name**

Michael

**My Age**

29

**My Education**

Gymnasium A-Level  
Company High Education  
Program

**My Background**

Former Craftsman  
10 years at the company  
was in production line

**My Role**

Forklift Operator

**My Competencies**

Power User  Casual User

Proactive  Reactive

Team Worker  Lone Fighter

Global Focus  Local Focus

Innovative  Conservative

**My Goal**

To be efficient  
Bringing Value to  
Company

**My Trigger**

Production Order  
E-Mail change request

**My Tasks**

Supply Production  
Channels  
Return goods to  
basement

**Frequency**

Hourly  Weekly

Daily  Monthly

Work Context
Feelings

**I work with ...**

Channel Operator  
Truck Driver

**My environment looks like...**

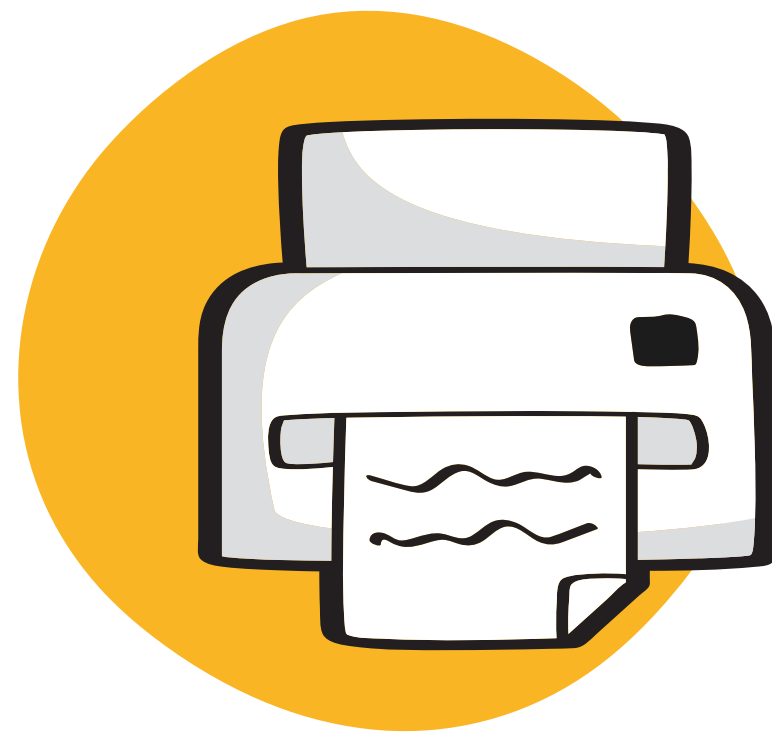
Forklift Cabin with  
touchscreen  
Shared Office with  
desktop

**What motivates me?**

Wants to learn more  
Feels he's part  
of the company  
Team Loyalty

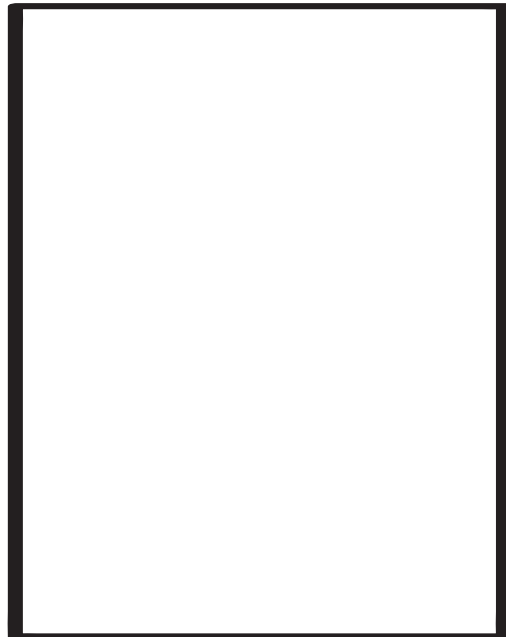
**What frustrates me?**

Double work  
of relabelling  
Too much information  
on the screen  
Scanner Quality



# Template for Print

## Demographics



My Name

My Age

My Education

My Background

## Work Context

I work with ...

My environment looks like...

My Role

My Goal

My Tasks

What motivates me?

## Activities

My Competencies

- Power User  Casual User
- Proactive  Reactive
- Team Worker  Lone Fighter
- Global Focus  Local Focus
- Innovative  Conservative

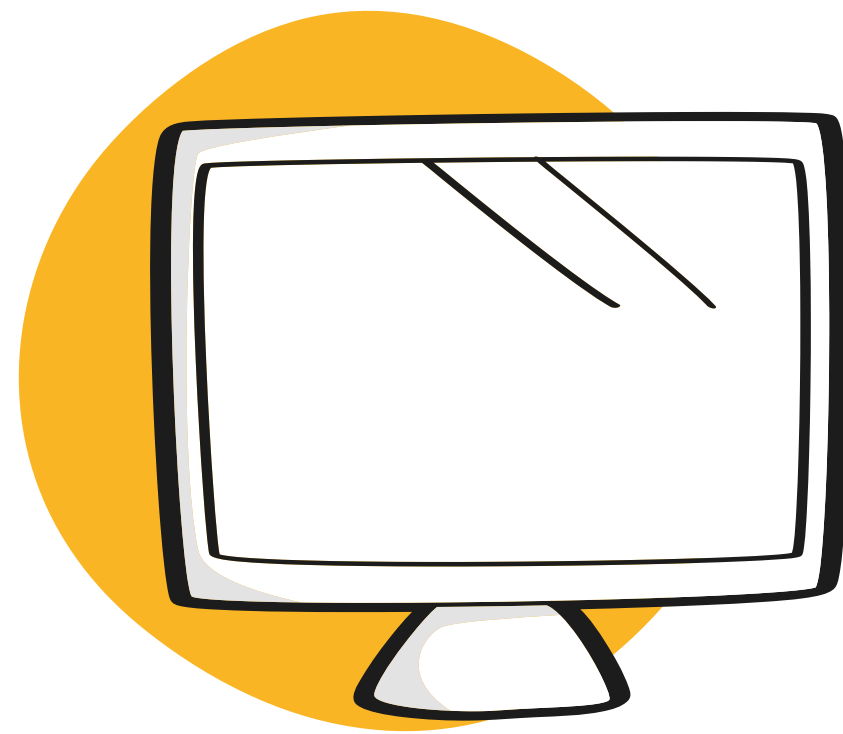
My Trigger

Frequency

- Hourly  Weekly
- Daily  Monthly

## Feelings

What frustrates me?



# Virtual Collaboration Template



# MURAL Template

## Persona



### Instructions

A persona is a "typical" but fictional user, which should be based on your research data. The persona template helps to make your research insights more tangible and guide design decisions.

**Time Needed**  
ca 20-30 Minutes

**Participants**  
5 - 6

**How to use**  
Work through the different sections, starting with the Demographics. Add points you learned from the research and synthesis.

**Tips for moderation**  
Create a realistic person, not a caricature which nobody will take serious. The better you emotionally can connect to the persona, the better. Everything should be based on your research results. Don't invent points.

**Recommended for**  
Discover Phase

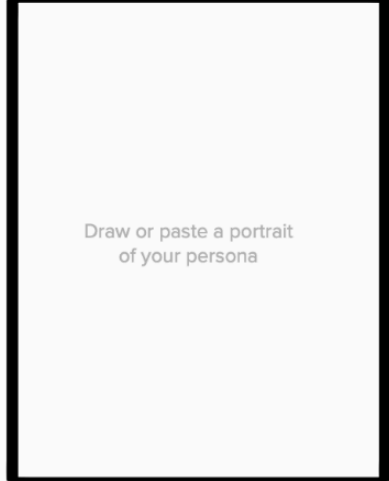
**Pre-requisites**  
Synthesisgrid

# Persona

Consolidate your research results into personas (one persona per user group). Create a character to which you can emotionally connect and which represents the key facts for your challenge and user group.

### Demographics

some basics about who your persona is



**My Name**  
pick a real name, representing the gender and age

[First Name]  
[Last Name]

**My Age**  
a number, not a range

[Age]

**My Education**  
most important education paths



**My Background**  
everything non education, maybe surprising



**My Role**  
the job title of the persona

[Job Title]

**My Goals**  
things persona want's to achieve



**My Tasks**  
main tasks, tasks related to the challenge



### Activities

details about the Persona regarding the challenge

**My Competencies**  
move the x to the fitting level between the tendencies

Power User	<input checked="" type="checkbox"/>	___	___	___	Casual User
Proactive	<input checked="" type="checkbox"/>	___	___	___	Reactive
Team Worker	<input checked="" type="checkbox"/>	___	___	___	Lone Fighter
Global Focus	<input checked="" type="checkbox"/>	___	___	___	Local Focus
Innovative	<input checked="" type="checkbox"/>	___	___	___	Conservative

**My Trigger**  
what let's the persona get in action



**Frequency**  
move the x to show how often the persona is confronted with the challenge

Hourly       Weekly  
 Daily         Monthly

Access the MURAL template: <https://app.mural.co/template/a7e35744-db9a-4862-98c3-637536ef63d4/e132a163-634a-46fa-b4fb-7daded10c5be>