

When Personas were not Fully Effective: The Mastery, Appropriation and Authority of a Design Tool

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At a company we'll call "Q", a set of personas were created and attempts were made to use them as a design tool, but we found they were not fully and effectively utilized. In this case study, we briefly describe what happened and provide some reasons for this outcome. For additional information related this case study, see Blomquist & Arvola (2002).

A behavioural scientist who worked at Q developed the two primary personas, which were based on interviews and observations with potential users of the portal. The design team used the personas to create scenarios describing general work tasks and situations of use. At design meetings and project meetings the scenarios were discussed and quite often they were shared through links in email. As design specifications were completed, screen dumps were put up on the wall together with scenarios that described their use.

Scenarios, early sketches, and design suggestions were combined in storyboards. Questions or design problems that arose were documented on sticky notes that were placed on the storyboard. The interaction designers did sketches and paper prototypes for visualising look & feel and interaction; these sketches and prototypes were used to communicate design ideas to the development staff. The goal was to have a tight dialogue so that everybody knew what was going on in the project and that no time would be spent on designing or implementing sub-optimal solutions.

While some aspects of the persona effort worked well, others did not. A number of conflicts and problems appeared in relation to the use of personas, which lead to breakdowns in the design activity. Within the UE (user experience) team the use of personas worked quite well, but the personas were not used by the crossdisciplinary project team. Åsa and I concluded that there were four reasons for the failure of the personas:

1. Only the interaction designers had know-how in goal directed design.
2. The interaction designers did not have authority to advocate the use of personas.
3. Other more familiar design techniques like use scenarios and user participation were used instead of personas for expressing who the user was.
4. The interaction designers themselves did not trust the primary persona; they had not participated in the creation of the persona and didn't trust that the persona was grounded in data.

In his 1998 book, James Wertsch described several reasons why tools can fail, and we believe that his arguments can shed some light on the partial failure of personas as a design tool at Q. The notion of personas as a design tool raises a number of issues related to tools in general. A tool is something that enables us to perform an action; it mediates our engagement in the world. Personas mediate our expression of who the user is; personas highlight some features of users and conceal other features. A tool is also situated within several communities of practice (Wenger, 1998); the use of personas is situated within a practice of interaction design as well as within a practice of systems development.

Wertsch argues that mastering a tool is not sufficient to guarantee the use of the tool—one must also appropriate the tool. The processes of mastering and appropriating a tool are highly intertwined, but they need not be. For example, if I am quite proficient at using a particular word processor I have mastered it, but if I don't feel at home with it, I have not made it part of my identity—I haven't appropriated it.

Similarly, for me, this is the case with many formal notations for UCD, for example UML, which prevents me from expressing myself the way I want to and therefore it remains alien to me. The uptake of a tool is always characterised by some form of resistance, where the tool needs to be moulded so that it fits with the individual who is using it. In return, the individual also need to be moulded and change his or her stance in relation to the tool. Making personas work in practice is a process of mastery as well as appropriation, but Åsa and I observed there also were issues of authority.

A tool is inherently an instrument of power, and this is just as true for personas as for any other tool. By declaring that all projects should follow a goal-oriented process and use personas, management can demand that we learn to master it as well as make it our own. This has inherent resistance, which must be acknowledged as well as respected or else people are likely to feel alienated. When management uses its authoritative voice to introduce a method or a design tool, two kinds of

appropriation are available: total affirmation or total rejection. There is no invitation to take part in the give and take of dialogue, which means that you cannot agree with one piece, accept but not completely another piece, and entirely reject a third piece (Wertsch, 1998).

This was the case in the project at Q. The old-timers in the Q User Experience team had completely appropriated and affirmed personas, while the newcomers struggled with the resistance of mastering and appropriating it as part of their process of becoming full participants in the UE-team. The cross-disciplinary project team thought that the idea of personas was good, but personas are not a familiar tool of their trade. They didn't appropriate the personas. In addition, they lacked motivation to do so since they did not seek to become full participants in the community of the UE-team. It became very difficult for the not-so-experienced interaction designers to engage in dialogue where the project team could take up personas part by part, since they themselves were only getting to know the tool. Had management entered with an authoritative voice they would have risked splitting the team in those 'for' and those 'against' personas.

The key factors behind the lack of uptake in the project team at Q were the processes of mastery and appropriation together with the inherent authority associated with the use of any tool. This is where one must strike a balance, and work towards what Schön (1983, 1987) has called a reflective practice, which is open for learning. For successful uptake of personas in systems development such a reflective practice is necessary, not only in the user experience team, but also in the other concerned practices like programming and marketing.

References

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