

Boiling Down Qualitative Data to Build Personas that Inform Spaces, Services, and Technologies

Personas are archetypes of user needs, wants, goals, and desires that allow for empathetic design of virtual and physical spaces and services. Commonly created using assumption-based methods, this recipe focuses on in-person interview analysis.

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NUTRITION INFORMATION

Personas have been used by libraries as part of their website redesign. Examples of libraries creating personas to support their website redesign and plan for services include Cornell in 2007, North Carolina State University in 2010, and University of Washington in 2014.

DIETARY STANDARDS

ACRL Standards for Libraries in Higher Education (2011) Principle 2, Indicator 2.5; Principle 6, Indicator 6.5; and Principle 7, Indicator 7.5

COOKING TIME

15 hours preparation; 1 hour per interview; 3–6 hours per transcription; 10 hours for persona making.

COOKING TECHNIQUE

- Interviews
- Affinity diagramming
- Writing

INGREDIENTS

- Interview protocol
- Marketing tools

- Incentives
- Interviewers
- Transcriber
- Qualitative data analysis

PREPARATION

Assemble Your Project Team

3 or 4 people interested in ethnographic studies with strong listening and pattern-recognition skills.

Design Your Interview Questions

What do you want to learn about your users? Let this shape your interview questions.

Develop an interview protocol—the script of what you'll say before and after your interview, a summary of the informed consent, and a prompt for the interviewer to collect the informed consent.

Apply for IRB Approval

Human Subjects Protection training is usually required.

When submitting your IRB protocol, you may need to include all project documents for review.

Recruiting the Participants

Create a website that can host participant-related documents in a common location, including the Informed Consent, Interview Sign-up, and Demographic Data form.

Use web-based scheduling software so participants can easily find and reserve times to be interviewed.

Incentivize your audience. Library promotional items, such as mugs filled with teabags and candy, can eliminate the tax hurdles of gift cards or cash.

Create recruiting materials for digital signage, flyers, and table tents, and the copy that will go in campus communications. Be sure to mention your incentive.

Post invitations in campus-wide communications and in digital and physical spaces around campus (not just the library!). Ask library liaisons to send requests to their faculty and students.

THE ASSESSMENT**Conducting the Interviews**

Use a recording device or program to record interviews. Free iPad applications, like Voice Record Pro, allow recordings to be edited, saved as .mp3, and sent to cloud-based storage systems.

Run each interview protocol with two interviewers—one person conducts the interview and the second takes notes about body language and notes salient moments.

Analyzing the Interview

Transcribe the interviews and, as a team, identify insights about each interview, including the user's attitudes, goals, and frustrations. *Each new insight goes on a new Post-it Note.* Indicate which user provided the insight.

Find a large blank wall or whiteboard for your project team to analyze your interview transcripts.

Group similarly themed notes together. Avoid matching by keyword or by user, which can conceal patterns. Cluster similar insights near each other to help themes emerge.

For each grouping, write a new note (in first person) that summarizes the group of Post-it Notes, e.g. *I have trouble with...*, or *I really love when....*

As a group, come up with thematic names, e.g. "persistent searcher," for the clusters of groupings.

Creating a Composite Archetype

Using your affinity diagram findings, fill in the details about the person you are creating. Is it student or faculty? How do they use the library? What activities are they involved with? These details make your archetype more believable and easier to relate to.

Packaging for Storytelling

Give your personas a face and a name to help your stakeholders connect to the personas. Demographic information for each persona should reflect your campus and the people interviewed.

ALLERGY WARNINGS**Time Commitment**

Human subjects training can take a few hours per team member. Plan ahead.

CHEF'S NOTES**Time Commitment**

Analyzing the data also requires a group commitment. Working in two- to three-hour blocks of time allows the group to become immersed in the data.

Data Analysis

Although qualitative data analysis software allows you to electronically organize your data, affinity diagramming allows for full immersion by building a wall-sized hierarchical grouping of interview notes. This will highlight common issues, themes, the scope of problems, and needs. Being well-grounded in your data will help you build a better archetype.

RESOURCES

Cooper, Alan. (2004). *The Inmates Are Running the Asylum: Why High-Tech Products Drive Us Crazy and How to Restore the Sanity*. SAMS: Indianapolis, 2004.

Cornell University Libraries. "The Cornell University Library Personas" (2007). http://ecommons.cornell.edu/bitstream/1813/8302/2/cul_personas_final2.pdf.

North Carolina State University Libraries. "Persona Interviews for Web Site Redesign (2010) | User Studies" (2010). <http://www.lib.ncsu.edu/userstudies/studies/2010personainterviewsredesign>.

University of Washington Libraries. "UW Libraries Patron Personas" (2014). <http://staffweb.lib.washington.edu/units/ITS/ux/2014-personas/uw-libraries-patron-personas>.

Virginia Tech University Libraries. "Understanding Library Users and Their Needs" (2016).