



UXer's guide to user personas

TEMPLATE AND TIPS

By Justinmind, the enterprise software prototyping tool.



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*“People lie. (Or, at least, tell you
the behavior they’d like to have.)
You can’t trust anything but past
behavior as an indicator.”*

[Jared Spool,](#)

UIE Founder

One of the greatest barriers to usability is users themselves. Why? Because users don’t always have a real insight into their engagement and interactions with software and applications.

Involving users in the software definition process is a necessary step in creating solutions that meet their needs.

But how will you know what they need if they can't even tell you themselves? Observation and documentation. Observing user behavior is a great way of tapping into the user's mindset. Documenting user behavior is how you make sure you act upon your analysis.

Creating a user persona is the best way to document a users' needs, goals, and mental models. Centralizing this information in a user persona template will help you, your team and your stakeholders visualize this information and make informed decisions when producing software.

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HOW TO CREATE A USER PERSONA TEMPLATE

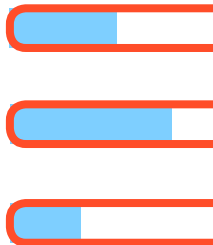
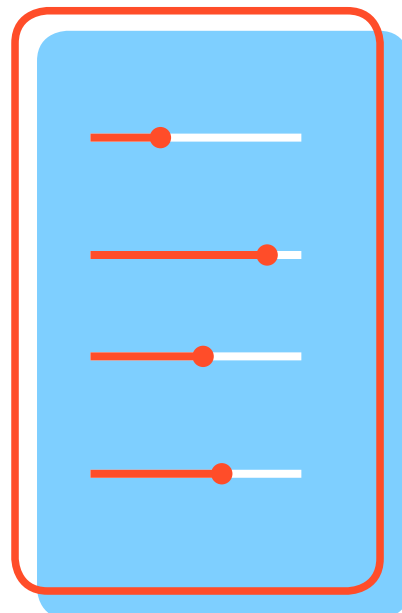
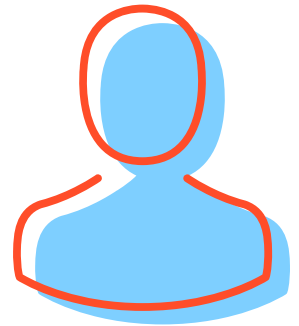
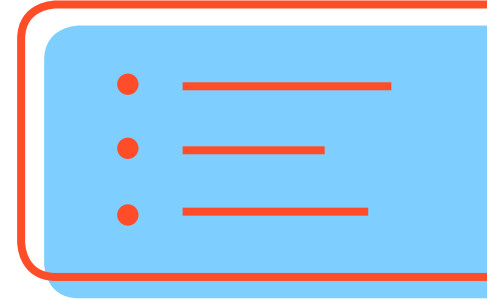
WHAT IS A USER PERSONA?

In user experience design, a user persona is a goal-directed **archetype** of your target user, audience or customers. These archetypes are used as reference during the definition, design and development legs of software projects.

Based on data collected from **user research**, your persona will include personal information and demographics, such as age, job title and salary, along with psychographics, such as motivations, goals and frustrations.

WHAT IS A USER PERSONA TEMPLATE?

A user persona template is a visual profile of the persona data collected in user research. An ideal template will lay out the persona's information so that it is quick and easy to scan.



WHY SHOULD YOU BUILD A USER PERSONA TEMPLATE?

“Personas are vital to the success of a product because they drive design decisions by taking common user needs and bringing them to the forefront of planning before design has actually started”

[Dana Frank](#), Segue Technologies

User persona development helps us measure true user behavior and figure out what their end goal might be. It drives design decisions by allowing software teams to get a deeper understanding of the users who will be using the systems they are building. Here's how the user persona template can benefit everyone in the software project:

- For designers and UXers, personas provide direction and help them to

draw on accurate information related to their target audience when creating products and services. This helps them stay on target and build products that will really engage users. They can then build informed [wireframes and prototypes](#) to visualize this information and present it to stakeholders, prior to production.

- For clients and stakeholders, personas help them to gauge whether the design team's vision accurately represents their business and product requirements.

- For the marketing team, personas help writers to focus their copy and content around the appropriate target.

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WHEN SHOULD YOU USE A USER PERSONA TEMPLATE?

Persona definition should be performed at the beginning of a software project. **This is the best way to ensure that your team is working with accurate and reliable data from the outset.**



HOW DO YOU BUILD A USER PERSONA TEMPLATE?

Once you've performed [user research](#), you'll need to condense the data gathered from the users. Start to divide up the user data into themes that make sense for your software. For instance, users who use mobile apps frequently versus those who spend more time on the PC.

At this point you will likely find that you have more than one target user. This is when you'll start to organize the different users into segments. [Usability.gov](#) suggests that you refine these segments by filtering them into primary, secondary and complementary users, with primary

users being those most likely to use your software regularly, and complementary who wouldn't use your software directly but might be directly affected by those who do.

Each segment that you create will need to be represented as a user persona, in a user persona template. You'll need to create a user persona for each segment - this could be up to 9 or 10 depending on your product.

Check out our user persona template in the next page and follow our steps to create your own.

USER PERSONA TEMPLATE

Our product is a new feature for a mobile banking app that allows customers to request loans and credit via the app.

Check out our user persona template. Click on the numbers to learn more about each section.



1 JUSTINMIND

2 CHARLOTTE WALKER
43, Los Angeles

3 FOUNDER

- STATUS MARRIED
- SALARY \$50K
- TIER SENIOR MAN.
- ARCHETYPE THE BOSS

4 PERSONALITY

- Determined
- Organized
- Practical
- Resourceful
- Compassionate

5 Motivations

INCENTIVE GROWTH

ACHIEVEMENT POWER

6 Goals

- To be able to request a loan quickly and easily.
- Hire a new employee rather than outsourcing.
- Grow her startup 5% in the next 3 years.
- Spend more time with her family.

7 Frustrations

- Overworking current team, wants to expand but doesn't have funds.
- Has no time for paperwork or long turnaround time outside of the office.
- Works long hours, travels a lot and banks are often closed or with long queues when she has time to go.

8 Behavior

Online banking (desktop)

Text banking (SMS)

Mobile banking (apps)

In-person banking

Telephone banking

9 Influences

- CREDIBILITY
- BLOGS/FORUMS
- CLIENTS
- FAMILY
- TECHNOLOGY
- SPORT

10 Frequently used apps

11 BIO

Charlotte is founder of a small consulting firm, which she set up 5 years ago. The company is growing and she wants to reward the hard work of her team with bonuses. She also wants to hire a new employee to take some of the heat off her current team. She would like to ask the bank for a loan to go ahead with her plans.

She is married with two kids and a dog. She loves to run and after a long day at the office, she is usually at the gym. If she isn't travelling for a client meeting. Her work requires her to be tech-inclined and she spends a substantial amount of time on her smartphone because of this.

12 "I'm looking for a fast way to request a company loan on the go."

1 - Image >>

2 - Name >>

3 - Personal information >>

4 - Personality >>

5 - Motioventions >>

6 - Goals >>

7 - Frustrations >>

8 - Behavior >>

9 - Influences >>

10 - Frequently used apps >>

11 - Bio >>

12 - Quote >>

THE USER PERSONA TEMPLATE, STEP BY STEP

When creating your template, you'll want to organize the information in an easy to read, logical format. Start with the most obvious elements: the header.



The header comprises the profile image, name and personal information.

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1 - Image: Your persona's image is the first thing that people will see. It should reflect your persona's personality and aim to improve memorability of your target user when making decisions surrounding the design of your web or mobile product/service.

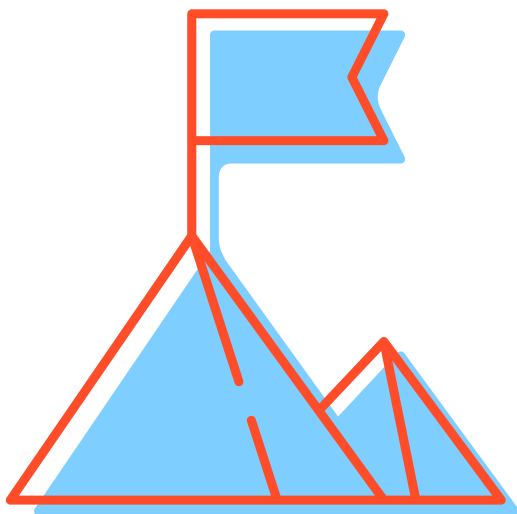
2 - Name: Similarly, the name of your persona will contribute to the reader's first impression. It should fit in with the image.

3 - Personal information: This section should capture important personal information and demographics. We've included age, location, position, family status, salary, tier and archetype. You could also include education, career path, ethnicity, and social environment. Collecting demographic information will help you place the persona in their environment.

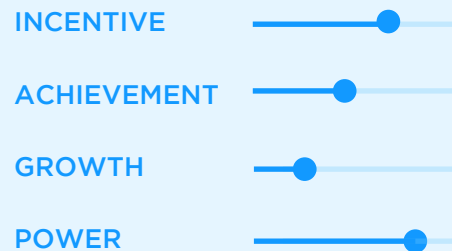
It is important to collect the right data for your persona from your user research studies. As Jeff Gothelf, co-author of [Sense & Respond](#) along with Josh Seiden, points out, it's no good to focus solely on demographics rather than needs and context. Your persona should help your team envision your product from the persona's perspective.

That's why **psychographics** are an important part of any user persona. They help to add a layer of empathy and realism when exploring the persona's needs and goals. Possible psychographics include attitude or personality, motivation and interests, goals, frustrations and influences. Here are the psychographics we've included in our template:

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Motivations



4 - Personality: The persona's personality will affect how they approach a potential product. If they are somewhat impatient and not technologically-inclined, they may be unlikely to try out a new mobile app for instance.

5 - Motivations: Motivations are what drive the persona towards the product you are offering.

6 - Goals: Goals are what the persona is looking to achieve through your product.

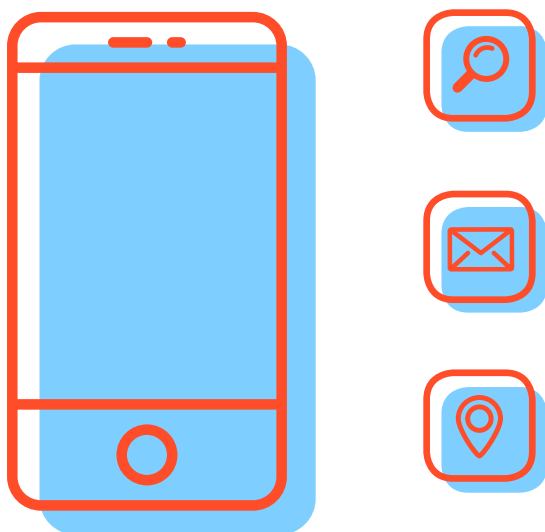
7 - Frustrations: Frustrations are the problems that the user is looking to find solutions to through your product.

8 - Behavior: Behavior measures how the persona interacts with products and services online and offline. In our example, we've used different banking systems.

9 - Influences: Influences are the groups of people, things or activities that will affect whether the persona will interact with your product.

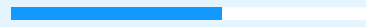
10 - Frequently used apps: Frequently used apps should give you a better idea of the applications, software or brands that this type of user interacts with. What software and/or applications does your person use on a regular basis? You might also want to add a section to display how much time your person spends on each activity each day.

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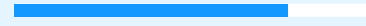


Behavior

Online banking (desktop)



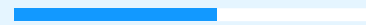
Text banking (SMS)



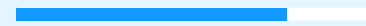
Mobile banking (apps)



In-person banking



Telephone banking



11 - Bio: The bio is the heart and soul of your personas template. It should give the reader context and set the scene. Almost like a mini case study, the bio explains why this persona is the ideal candidate for your product.

- **What is your persona motivated by?**
 - **What are they looking for?**
 - What are their needs?**
- **What are their biggest challenges?**
- **How might your product or service solve this for them?**

12 - Quote: We like to think of the quote as a bonus feature. It helps to sum up what matters most to the persona, and how it relates to your product.

The most important part of creating a user persona is knowing how to leverage it. Creating a well-developed persona can help you get informed about your target users. But if you don't know how to present the information to your team and stakeholders, that all-important information is going to go unnoticed.

Creating a visual, informative user persona template will help you align your teams and stakeholders around what your users want. These insights will help you all make informed decisions when producing your software.

So get to know your users, create a user persona template, and leverage what you learn for their benefit, and the benefit of your software.

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