

Implementing Personas for International Markets: A Question of UX Maturity

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Abstract

Qualitative methods are deemed time consuming and costly. At the same time qualitative methods are often seen as less valid than quantitative methods in terms of stating anything conclusive on a target group. The persona method originates from qualitative research and is in its original form based on qualitative data gathering. Introducing personas on global markets also increases the costliness and time-consuming aspects of the method. This poses a lot of problems in a practice perspective for companies, where a quantitative mindset is the foundation. This paper argues, UX maturity plays a vital role in how personas are perceived and that research on personas for international markets might be looking in the wrong places if it does not acknowledge the practice perspective, where practitioners try to adapt the persona method to the reality of day-to-day business. The interviews conducted for this study indicate that this primarily has to do with the UX maturity of the company in which daily struggles and negotiations play out. This paper concludes that UX maturity improves gradually as UX becomes more embedded in the fabric of the company and that a shared methodology on the matter of personas in a global context will be mutually beneficial, as it evolves over time.

Keywords

UX maturity, personas for international markets, user experience, practice perspective, qualitative study

1. Introduction

Since Alan Cooper described personas back in 1998 much has happened [1]. The persona method is now expanding into new emerging markets in various countries around the world, which calls for a different way to overcome the international barriers [1]. This paper regards personas as a qualitative method built on the notion of Cooper [2] and later by Nielsen [1].

The amount of research done on personas for international markets is very limited. Existing papers largely focus on how companies construct their own personas, which prove to be superficial, not comprehensive enough, or too complex [1]. This poses a need for further research to be done on the topic of implementing personas for global markets. This paper takes on the view of user experience (henceforth UX) practitioners to uncover why they face challenges in their work with personas for international markets, resulting in inadequate persona descriptions [1]. This paper seeks to place itself in the gap between the mapping of challenges by Nielsen [1] and the question as to why these challenges are present in the field of personas.

This paper argues that the maturity in terms of UX in companies plays a vital role in how personas can be implemented in companies that operates in many markets. UX maturity is defined by a company's habituation and previous experience both good and bad, with user experience design and research. This influences the willingness of the company to spend both time and money on the development and implementation of personas.

UX maturity is thus used in this paper as an overarching term to describe how embedded UX is in a company. For the purpose of this paper, we define personas for international markets as personas that have been developed with corporate purposes in order for the corporation to gain information about users on new, international markets.

The motivation behind the choice of this topic is based on its relevance in regard to the growing tendency towards user centered research and design in companies today [3]. When companies expand to new and foreign markets, this creates an urgent need for a shared language and a common understanding of the end user, across departments in the company [1].

This leads to the following research question:

Why do UX practitioners face challenges when implementing personas for international markets?

2. Existing research

The global aspect of personas research is sparsely discussed in the literature up until now. Nielsen and Nielsen examine the use of personas in Danish companies [4] and how the international perspective adds an extra challenge when developing persona descriptions. The two main challenges are to collect enough data and the difficulty of writing persona descriptions, which captures a broad, international target group.

Nielsen and Nielsen [4] describes how companies develop their own strategies in regard to persona development for new, international markets, and how there is no research that supports the applied strategies used by companies today. The article [4] takes on the challenge of developing personas and how personas will aid globally distributed teams.

Putnam et al. [5] describes the strategies they employed when developing persona descriptions from data from India and Kyrgyzstan. They found that personas were an effective method to organize and communicate quantitative data. Moreover, Snyder et

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al. [6] describes various approaches to integrating cultural differences into personas, and conclude that personas should be modified to address cultural differences among users.

Research in the area of UX suggests a similarity to the Five Stages of Experienced-based Differentiation Maturity by Temkin [7]. Temkin's five stages have been translated by a number of UX practitioners into similar UX maturity models. The findings in this paper, in many ways support and reflect Temkin's theory of five levels of maturity, and the model is thus used in this paper to inform our analysis and discussion. The five levels of maturity range from 1) Interested, 2) Invested, 3) Committed, 4) Engaged to 5) Embedded (Interested being the lowest level and Embedded being the highest level of UX maturity within a company) [7].

This paper places itself amongst the current research by focusing on the preliminary phase of persona development and asks *why* it is a problem for practitioners to implement personas in a global context.

3. Method

The global aspect of personas is a branch of the method, which is still not clearly defined, and many of the companies we were able to get in contact with had only recently begun to consider the possibility of developing personas for global markets. Therefore companies' use of personas for global markets could only be studied based on their intents, and not their results with said method.

The data material of this paper consists of three elements: A seminar, a workshop (which were both video recorded and notes were taken) and two expert interviews, thus to investigate the research question.

First, we participated in the opening of the *Center for Persona Research and -Application* at the IT-University of Copenhagen, a three-hour seminar with researcher presentations and a panel discussion. Secondly, we then observed a workshop on the topic of Global Personas by Lene Nielsen, and finally conducted two expert interviews: One with a respondent (R1) who is Senior User Experience Researcher at a global software development company, and has 14 years of experience working with personas. The second respondent (R2) is working as Head of Digital Experience at an international investment bank, and 13 years of experience practicing UX. Both interviewees were selected on the basis of their professional experience with personas, and the fact that they were developing personas for new, international markets at the time.

Both the opening of the Center for Personas Research and -application and the workshop was observed with a focus on topics of concern to this study. As researchers, we observed the opening as insiders [8].

The opening of the center was formal, and the majority of the participants, who were mainly UX practitioners, were only listening and not actively debating, thus resembling the observational role we took. All 5 authors observed the seminar and took notes, which we discussed afterwards in order to deduce key points from the seminar and overall challenges in regard to the persona method itself.

The workshop was an event for a much smaller amount of people, which we observed as outsiders [8]. Our role was clearly defined and explicitly presented by Lene Nielsen during the first part of the workshop, as advised by Creswell [8]. The attendees were a mix of researchers and practitioners. Notes were taken, and both audio and video were recorded, thus having a rich amount of empirical data to lead the later analysis.

The interviews were conducted as semi-structured interviews [8][9]. Both interviews were audio recorded, but not meticulously transcribed as Creswell [8] depicts. This was deliberately disregarded due to the timespan of the research project, and the fact that the authors have taken notes and listened to the audio recordings, and condensed the categories and topics from the data material. Creswell argues that individuals one-on-one, "... *may be hesitant to provide information*" [8], but this was not the case in the interviews we conducted. Our choice and structuring of methods, and the way they rapidly followed each other, did not leave much time to analyze the data from one method, before conducting the following method.

3.1 Faults and deficiencies

The interview guides were strictly built on brief discussions and notes from the center opening and the workshop, as the lack of time prohibited further analysis, at that point. Therefore, reflection and revision of the already conducted methods did not take place before the next method was conducted, thus not taking advantage of the newly gathered data to inform the following research.

Furthermore, the view of the management is not accounted for in this paper as the management and executives from the companies involved in this study are not represented in the data set. Therefore, conclusions are solely based on the empirical data and the analysis hereof.

4. Analysis

In the following paragraph we will analyze the empirical data gathered throughout this study. The analysis will explore the research question as to why companies face challenges when trying to implement personas for international markets. This will be done with a focus on the methodology used by practitioners when doing user research, the role of management and the general impact of UX maturity, and what implications UX maturity has on the implementation of personas in a company.

4.1 Management

Management traditionally consists of individuals with an educational background in economics, which by nature rely on quantitative methods and focuses on return on investment [10] [11]. It is the management's job to calculate risks, invest with the goal of a surplus and evaluate new projects with a scope for a positive return [10] [11]. Personas are hard to back up with numbers and standardize in terms of return on investment, due to its qualitative origin and use [12]. This immeasurability can cause a gap between UX practitioners and management [4].

In the interview, R2 underlined that in his work with personas it is important to be able to trace the origin of the persona's characteristics back to a specific data set, from surveys conducted with customers, when presenting the persona to those who are to apply them in practice. R2 moves on to describe how he relies on quantitative data when presenting his results to the management, as this comes across more easily [13: 22.05].

Temkin touches upon this matter, which he terms *senior executive anxiety* [7:11]. Temkin argues that executives in the lower level of the maturity scale will be less likely to invest, or want results quicker based on investment [7]. Both R1 and R2, and attendees at the workshop had either not begun, or were in the beginning stages of implementing personas as part of new UX strategies at their current workplace. According to Temkin, this is the first step on the maturity ladder, a step he defines as "*important but receives little investment from the executive team*" [7:7]. This can be due to the previously stated fact that management will typically

assess the implementation of new methods as a risk, and will then be less likely to allocate money to what can be perceived as radical rather than incremental adjustments [14] [15].

4.2 Co-workers

UX maturity is not only relevant for management but also for the co-workers of the practitioner. R1 describes how the prevalence of UX within the company is dependent on how willing and able both management and co-workers are to adapt to it:

"I'm dependent on some other people here to help me find these users. And just because it's hugely important to me doesn't mean that it's hugely important to them. We have a lot of people here who are busy and have lots of exciting projects and things to do, and just because I have an idea of doing this doesn't mean that it's going to happen overnight. But it's coming slowly and I can see that in the 10 months I have been here, things have developed." [16: 18.20]

The attitude of the co-workers is also crucial, further on in various projects, because they are the ones who are going to use the personas. A challenge arises, when the practitioner seeks to validate personas. When the practitioner presents a persona to his co-workers a negotiation is initiated in which those who use the persona, have a say in the design and content of the persona in order to make it applicable to them. In this sense, the practitioner will have to comply with the wishes, and demands of complexity of the persona. R1 states that verification is primarily about usability for the people using the persona. In addition to this, R2 mentions that verification with co-workers is a crucial part of the process, that the verification is very important to him and his forthcoming activities. Involving management and co-workers are found to be part of a "strategy" of the UX practitioner in order to strengthen his position within the company.

4.3 UX in practice

There seems to be an imbalance among the methods used by UX practitioners. I.e., usability testing is a more widely recognized method than personas, which among the respondents for this study means that the work with personas is something they do 'on the side'. R1 elaborates:

"What we're going for right now is trying to get some wins as for usability studies and expose them to the value of user experience, and then as time goes on, [management and co-workers] can really see the value in what we do" [16: 14.00]

This indicates that the goal is more important than the means, and in many ways reflects a progression in UX maturity as defined for this paper. Even though data collection for personas becomes embedded in other activities (e.g., doing an interview with a respondent subsequent to a usability test, or using survey results to inform the start-up phase) it is found to be an accepted reality of the respondents. This means that a reduced set of data-gathering methods are in play, but in a low maturity level company, low scale projects might also be more effectual. A UX practitioner from the workshop emphasizes this point:

"There is a lot of prejudice and barriers in an organization which you have to overcome (...) in order to complete some kind of formal argument for top management or whatever. Very low scale projects to start with. So to illustrate how far it can take a given company, which is quite efficient actually" [14: 37.14].

In this sense, part of being a UX practitioner is really about acquiring more and more freedom over time. This is done by creating results, which can validate and qualify the practitioner's position, and the methods themselves. R1 exemplifies this by

talking about project cycles and how to improve on the UX maturity of the company:

"Firstly, we have to make [management] aware what we can achieve [with UX] and follow the reactions. Secondly, we need to make [UX] an integrated part of the company, and make sure it becomes part of a project cycle at an earlier and earlier point." [16: 18.20]

Moreover, R2 emphasizes that in his case, developing personas was not initiated by the company, but rather the company wanted to uncover and get to know which types of people their customers are through surveys. It is with a basis in these surveys that R2 on his own accord compiled a set of personas [13: 1.18.39].

In any case, there seemed to be a mutual agreement between participants at the workshop, that the actual, physical manifestation of the persona was the defining turning point of management and co-workers to a more positive perception of the method [14]. This was independent of how the data was collected, and how the persona was crafted. This suggests that adapting the method to the UX maturity level of the company, can help the practitioner achieve minor, cyclical "wins" [16], which again will have a positive effect on how embedded UX maturity is within the company.

The more mature the company is in regards to UX, the sooner it can apply personas in practice. This underlines that implementing personas for international markets, is a question of UX maturity within companies, which is found to develop over time [7].

5. Discussion

Rosted argues that when a company conducts user research, and involves its users early on, the process of innovation becomes user-driven, thus enabling radical innovation to take place: *"If companies understand the reason behind users' behaviour, they can gain insights that will enable them to develop new concepts or platforms. In other words, companies will be able to go beyond incremental innovations and aim for more radical innovations to take place through user involvement."* [3:22]

Norman and Verganti discuss guaranteed continual improvement within well-known limits as incremental innovation [15:3]. The alternative – radical innovation – is defined as a change of frame; in other word something radically new to the company [15], which Rosted argues the user plays a vital part in. The notions above constitute a strong argument for approaching UX in a company. To reach new heights both in regard to getting to know the users, and in regard to product innovation, this section discusses UX methods, including personas, as a necessity. However, the introduction of UX, including personas, will often have difficulties being accepted in a company, as companies typically will lean towards incremental changes to the already existing user research – "doing better what we already do" [15:5]. The incremental change is safe, but has its limits, as discussed by Norman and Verganti [15]. The trained UX practitioner, and individuals devoted to the Design Thinking paradigm have a hard time deviating from what they have been taught, which is to aim for radical change and innovation [15]. Their idealistic ideas are most likely to be neglected by the management in companies with a low level of UX maturity, as they want incremental changes to what they already do [7]. Our data indicates, that incremental change to user research is the winning way to gradually strengthen the position of UX within the company by combining the needs of the company with the experience of the UX practitioner. R2 is developing personas on a quantitative foundation, knowing that the qualitative aspect only has a chance of survival if introduced later on in the user research process [13]. To suggest radical

changes to the way user research is already done will not yield sympathy – most likely it will be rejected. Starting small, gaining ground with minor wins along the way will nurture the company's UX maturity in a positive manner. This will later make the idea of personas more appealing, thus making the decision on the management's part easier toward allocating funds for qualitative user research. In particular, when trying to implement personas on global markets funding becomes an even more urgent matter, and a higher level of UX maturity may ease the process. Regardless of the UX maturity level in a given company, and no matter the amount of data, and how accurate the data is, it cannot be applied in practice and will not be accessible to others until the researcher has presented the data in the form of personas. This also indicates, that no actual results can be predicted. Again, a clear indicator of the fact that minor wins are vital to the growth of a company's UX maturity, and a general change in the mind-set of the management, towards the necessity, and value of UX methods. A potential way to improve the incorporation of personas at a low UX maturity level would be to implement what this paper defines as *multi purpose data collection*; being able to collect data for multiple methods at once, and support individual needs of the methods in question. Our data material shows, it is already the reality of the respondents, but at this time, collecting data for multiple purposes is perceived as being in conflict with other tasks of the practitioner, in the sense that the funding is specifically allocated to more measurable UX methods [13][14]. As the practitioner can collect data for multiple purposes, the cost will not be affected, and the timeframe will remain the same. Planning the collection of data with this in mind, could reduce the stress level in regards to obligations and responsibilities of the practitioner, and leave surplus energy to make strategic moves that can be turned into wins, and thereby improve the UX maturity of the company.

6. Conclusion

UX maturity is found to play a vital role in how personas, and qualitative methods, are perceived in a company. Personas are difficult to substantiate with numbers and often quantitative methods are favored by the management. A lower level of UX maturity within a company has been found to have a causal relationship with a high level of senior executive anxiety towards qualitative user research. This leads to the management not allocating funds to do proper user research that can inform the development of personas for international markets.

Furthermore, the willingness and ability of the co-workers to adapt to the use of personas are crucial, as a recurring validation of the personas takes place between the co-workers and the UX practitioner. The data material used for this paper proved it is difficult for the UX practitioner to develop a best practice, as the co-workers have a say in how the persona descriptions are developed, so they find them informative and applicable. The best strategy found, is to involve co-workers and management early on to strengthen both the methodology and the position of the UX practitioner within the company.

Lastly, it has been discovered that most qualitative UX research is done on the side since qualitative methods as described are less recognized compared to quantitative methods by the management. The job at hand for the UX practitioner within a company with a low level of UX maturity is to acquire more freedom to prove the worth and value of qualitative UX research. This can be done by

achieving minor, cyclical wins and by making early persona descriptions available to co-workers and management. This is found to change the perception of the method in a positive manner. The practitioner in the company should capitalize on this and furthermore increase the focus on consolidating data collection for multiple methods at once. This will increase the UX maturity level within the company as well as the likelihood of the management perceiving qualitative methods as reasonable and eventually to allocate the much needed funding. Hereby also indicating the importance of the UX maturity level within a company seen in relation to the global aspect of the persona method. We advise that the UX practitioner should not engage in implementing personas for international markets, if the UX maturity is not deeply embedded in the company, seen in the light of the obstacles presented in this paper. The implementation of personas for international markets is hereby a question of UX maturity within the company.

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