



PERSONA MAPPING

A Persona Map, sometimes called Pen Portrait, is a tool that helps designers to create a representation of types of users, employees, and stakeholders. Personas answer the question, 'Who are we designing for?' and they help to align strategy and future solutions to specific target groups.



PREPARATION:
up to 20 minutes

DURATION:
45-60 minutes

FACILITATORS:
1 per workshop

RESOURCES:
Research data, persona templates (paper-based or digital), paper, pens, masking tape, Post-its, a large sheet of paper or whiteboard

PARTICIPANTS:
2-8, design team, partners, community members, etc.

EXPECTED OUTCOME:
3-5 personas

DESIGN PHASE:
Insights

TEMPLATE OR GUIDELINES:
Persona template

Persona are archetypes and a way of ensuring the 'ideal user' doesn't remain an abstract figure. Designers use field data about their needs, characteristics, motivations, ideals, values, behaviors, preferences, personality, etc. to create personas.

1. START:

Define the focus of what you are interested in and consider what you want to do with your findings.

2. IDENTIFY:

Based on the selected focus area, define the criteria and select suitable groups of participants who should join you to create your personas. For example, key stakeholders representatives.

3. PREPARE:

Organize a meeting with the selected participants, prepare the room, and gather the necessary resources and supplies to create personas, such as persona templates, paper, Post-it, pens, and the field data. All the data gathered during the Insights phase, about users, employees, stakeholders and smart objects (i.e. IoT), should be printed out (e.g. key pictures, audio recordings, screenshots). Think about what expectations will

be set up-front, how you will start and end the workshop, and how much time participants are expected to dedicate to this activity.

4. CONDUCT:

Ask participants by following the 4 actions below:
DEFINE: Look for themes/characteristics that are unique and common to the user, employee, stakeholder or smart object. Define groups of that you would like to exemplify with personas, and name them.

- **REPEAT:** Iterate several times to validate your underlying assumptions, find gaps in your research, and iterate. Check if you are missing some data for your personas - fill any gaps.
- **REFINE:** Combine and prioritize the rough personas. Separate them into primary, secondary, and, if necessary, complementary categories. You should have roughly 3-5 personas and their identified characteristics.
- **MAKE:** Use the Persona template to develop the appropriate descriptions of each personas' background, interests, motivations, skills, dreams, expectations, etc.

5. REPORT:

Make a short summary that includes key findings and examples from the data that exemplify these.

