

UXPRESSIA

Persona creation guide with UXPressia

NAME
Ava Smith

MARKET SIZE
10%

TYPE
Rational

Background
Ava is a sales representative with 8+ experience in IT sales. She has recently moved from LA to Sydney after a friend of him invited Nick to join his startup company.
The company is small, and Ava is involved in non-sales activities as well. That makes her extremely busy.
Their product is under development, and Ava wants to build a list of potential customers and partners in advance to be well-prepared for the release.
As a salesperson, she is not embarrassed to ask for a discount for anything.
She is lactose intolerant and has to keep to a lactose-free diet.
Ava also like blogging, so she is extremely active on Instagram.

Quote

Demographic
Female 21 years
United States

Goals
Find a full-time office job

Background
Lewis is about to graduate and is looking for a job to work here and there for a while.
But he has time to work on his side projects.
A professional recruiter contacted him for an entry clerk position at a company. He is not sure if he should accept the offer.

Technology

Demographic
Male 22 years
United States

NAME
Nick Martin

Demographic

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What's UXPressia?

[UXPressia](#) is an online collaborative platform for creating and sharing customer journey maps, customer personas, and impact maps.

In this short guide, you will learn how to get started with personas and create them in the [UXPressia Persona tool](#).

HOW TO DEFINE PERSONAS

HOW TO DEFINE PERSONAS

What are personas?

Personas are fictional characters that represent the different customer or user types that act in a similar way when using your product or service. There can be different criteria for grouping customers into personas, of which the most common are demographics and behavior.

- **Demographics-based grouping**

Questions to start with:

- Who are your customers?
- What's their age and gender?
- Where do they live?
- How much do they earn?

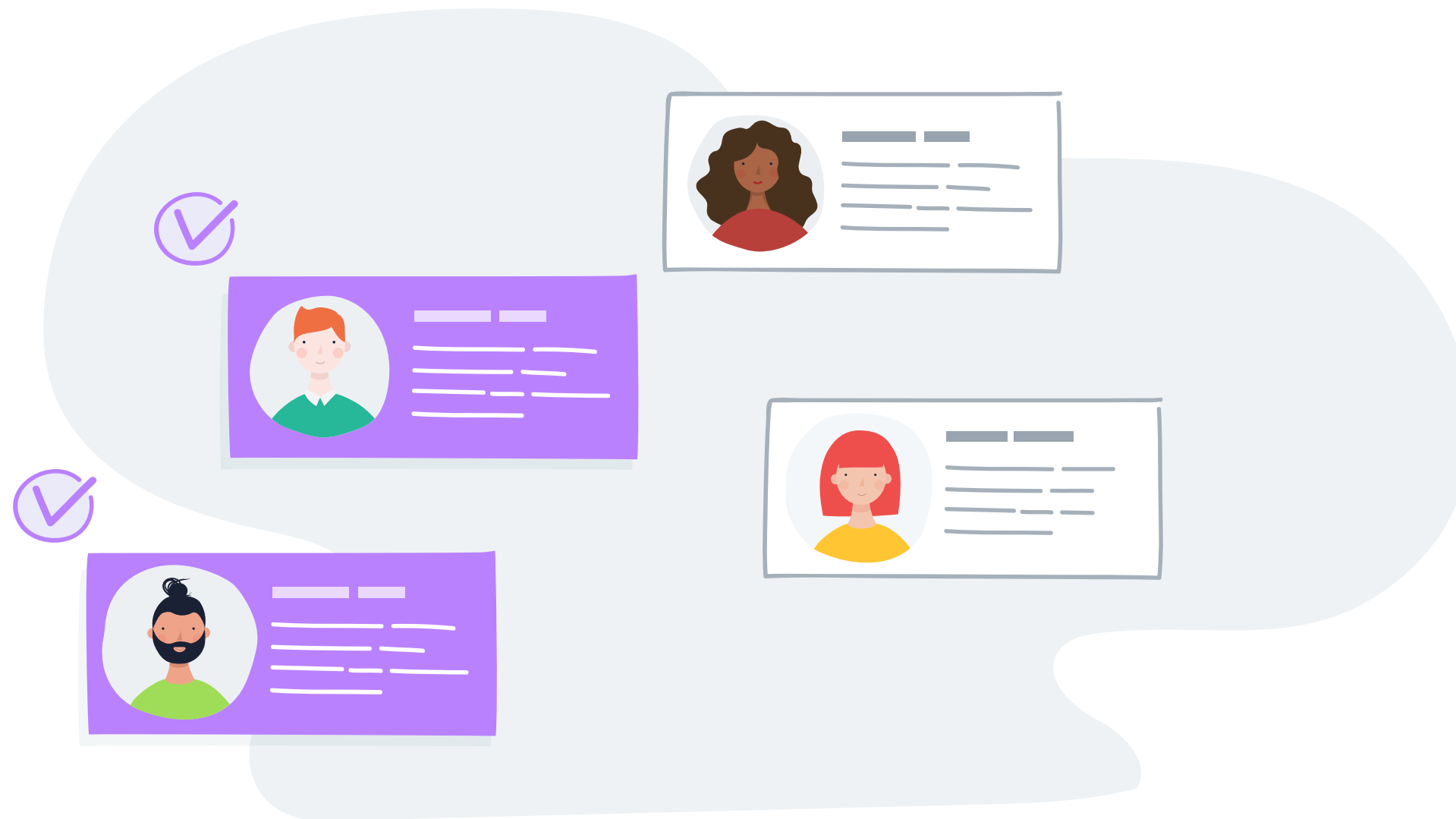
- **Behavior-based grouping**

Questions to start with:

- What do your customers want?
- Why are they doing particular things?
- What motivates them?
- What frustrates them?

HOW TO DEFINE PERSONAS

In some cases, like targeted advertising on social media, personas based on demographics work best. But having behavior-based personas is much more beneficial in most cases. Such personas offer you valuable insights into how to improve customer experience and your product or service in general.



HOW TO DEFINE PERSONAS

Step 1: Conduct research

The first thing that needs to be done is learning from your customers or users. The goal is to gain a clear understanding of their goals, tasks, needs, and pains. And one of the best ways to get to know your customers or users is to interview them.

Each case is unique, but you can use the template at the end of this guide as a starting point when preparing for interviews.

The number of interviews you should carry out to gather the information you need can vary.



HOW TO DEFINE PERSONAS

The rule of thumb is to interview 5-30 people per role, and the tasks that these people perform define each of the roles. Having interviewed 5 people, you'll start detecting trends. At some point, you'll notice that interviews bring very little or no new insights — that's the sign that you don't need any more research.

If, for some reason, you cannot interview your users or customers, you can interview people from your company who directly interact with them, such as sales representatives, customer support agents, customer success managers, etc.



QUICK TIP:

Organize an [empathy mapping workshop](#) with them to get answers to all your questions.

HOW TO DEFINE PERSONAS

Step 2: Identify behavioral attributes

Now it's time to analyze the research data you have. Identify behavioral attributes common to people with the same role (e.g., marketers). The attributes should describe what affects a person's behavior in situations when the person:

- Is trying to complete some tasks
- Is achieving goals
- Is solving problems
- Is interacting with your product

Example: personal finance management experience

Attributes:

- What's the reason for managing personal finance?
- How frequently does the person manage personal finance?
- What tools does the person use for managing personal finance?
- Where does the person store information about spending/income (context)?
- Who is in charge of managing personal finance?
- What keeps the person from managing personal finance? I.e., what are the fears?

HOW TO DEFINE PERSONAS

Step 3: Create behavioral scales

Once you write down all the behavioral attributes, define all the possible values for each attribute. Most of the observed behaviors can be represented as a scale, discrete, and with values that each attribute can take. Here is an example of such a scale:

What keeps the person from managing personal finance?



Typically, you will end up with 5-20 scales, each of which will have at least three values. If you are stuck, consider using some of the scales that come next.

HOW TO DEFINE PERSONAS

Person profile

Experience

- Current experience: how does the person solve problems/achieve goals now?
- Previous experience: how did the person solve problems/achieve goals in the past?
- Experience with your product/service
- Experience with your competitors
- Experience with your domain

Example:

Personal finance management experience

- Doesn't manage personal finance
- Tried to manage personal finance previously
- Manages personal finance from time to time
- Constantly manages personal finance

HOW TO DEFINE PERSONAS

Person profile

Human factors

- Age
- Geography
- Education
- Physiology
- Etc.

Example:

Restrictions on interacting with a device

- Fine motor difficulties
- Vision problems
- Severe restrictions (able to use only one hand)

HOW TO DEFINE PERSONAS

Person profile

Problems, barriers, frustrations

- What problems does the person want to solve?
- What does the person try to avoid?
- What is the person afraid of?
- What keeps the person from achieving goals?
- What difficulties does the person face when accomplishing tasks/achieving goals?

Example:

What keeps the person from managing personal finance?

- Not able to keep records
- It's time-consuming
- Afraid of data loss
- Lack of privacy (other people can get access)
- It's a waste of time (I won't see any results)

HOW TO DEFINE PERSONAS

Person profile

Needs, goals, expectations

- What does the person want to achieve?
- Why does the person perform a specific action?
- What does the person expect from the interaction, your product, content, etc.?
- What needs does the person want to satisfy?

Example:

What's the reason for managing personal finance?

- Tracking financial flows
- Reducing costs
- Saving up for something
- Tracking expenses
- Planning a personal budget

HOW TO DEFINE PERSONAS

Person profile

Knowledge

- Domain knowledge
- Your product knowledge
- Knowledge of technology and current trends
- Professional knowledge

Example:

What does the person know about managing personal finance?

- Knows nothing (e.g., uses a pen to do calculations)
- Knows little (e.g., does calculations in Excel)
- Knows about specialized services
- Takes advantage of one or more services

HOW TO DEFINE PERSONAS

Behavior profile

Tasks

- What does the person do? What tasks does the person perform?
- What are the typical scenarios?
- How frequent are these scenarios? What's their importance?
- What are the relationships between these tasks?

Example:

How often does the person manage personal finance?

- Doesn't manage at all
- Occasionally
- On the same day
- Immediately after purchase
- Regularly

HOW TO DEFINE PERSONAS

Behavior profile

Triggers

- What prompts the person to start performing a task?
- What prompts the person to switch between tasks?
- What prompts the person to pause or stop?
- What are the interruptions when performing a task?

Example:

What prompted the person to start managing personal finance?

- Unexpectedly ran out of money
- Decided to start saving for a big purchase
- Had no spending money for some time
- Understand whether he/she will be able to start paying for a gym
- External factors (e.g., friends).
- Curiosity

HOW TO DEFINE PERSONAS

Behavior profile

Execution time

- How much time does the person spend on the task?
- How does the lack/availability of time influence the behavior?
- Expectations of time spent on the task execution
- What determines the execution time?

Example:

What does the person do if he/she cannot write down income and expenses on time?

- Saves the bill/takes a screenshot and writes down everything within the shortest possible time
- Saves the bill/takes a screenshot and writes down everything later
- Tries to remember the figures from the bill and write down everything later
- Forgets/does nothing
- Sets notifications to get back to this task later

HOW TO DEFINE PERSONAS

Context profile

Environment

- When does the interaction take place?
- Where exactly does the interaction take place?
- What channels are used?
- How does the person impact the context?
- Restrictions and opportunities of the context for the person

Example:

What tools does the person use to manage personal finance?

- No tools. Tries to remember all income and expenses
- Saves bills and account statements
- Writes notes in a notebook
- Uses non-specialized software like Excel and Google Sheets
- Uses specialized software

HOW TO DEFINE PERSONAS

Context profile

Relationships with other participants

- Who else is involved in the process?
- What's their role in the process?
- Who is a decision-maker?
- What influence do others have on this person?
- What influence does this person have on others?
- Restrictions and opportunities within the process

Example:

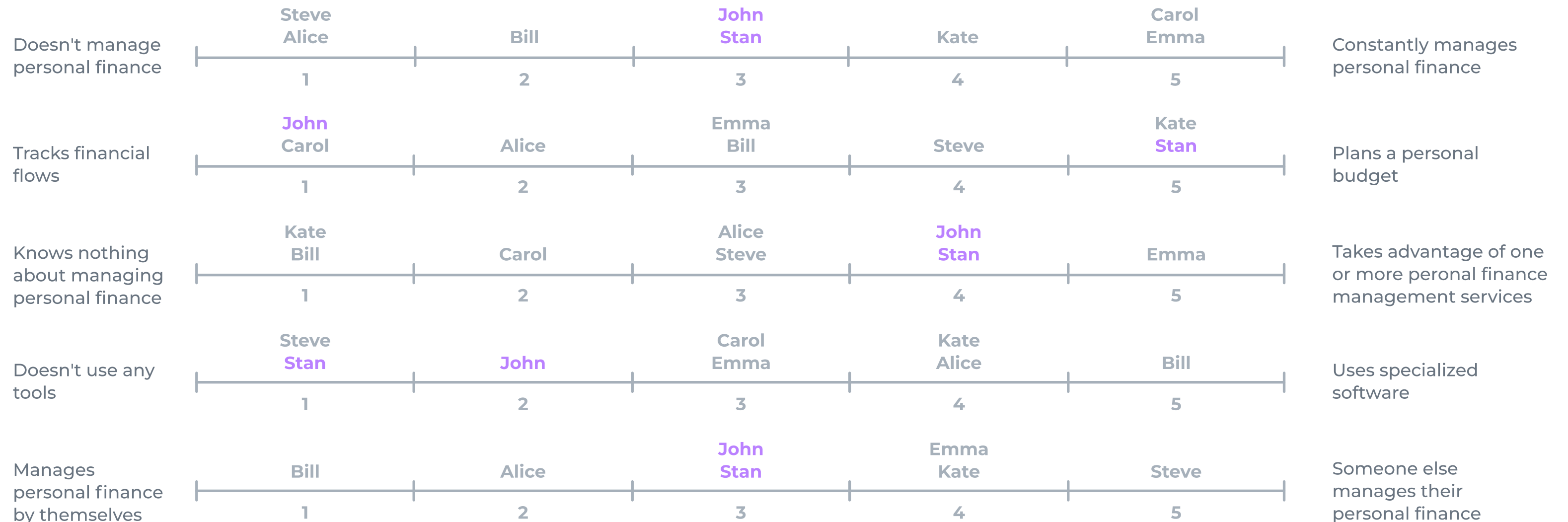
Who is in charge of managing the person's personal finance?

- The person themselves
- Someone assists the person
- Someone else (not the person)

HOW TO DEFINE PERSONAS

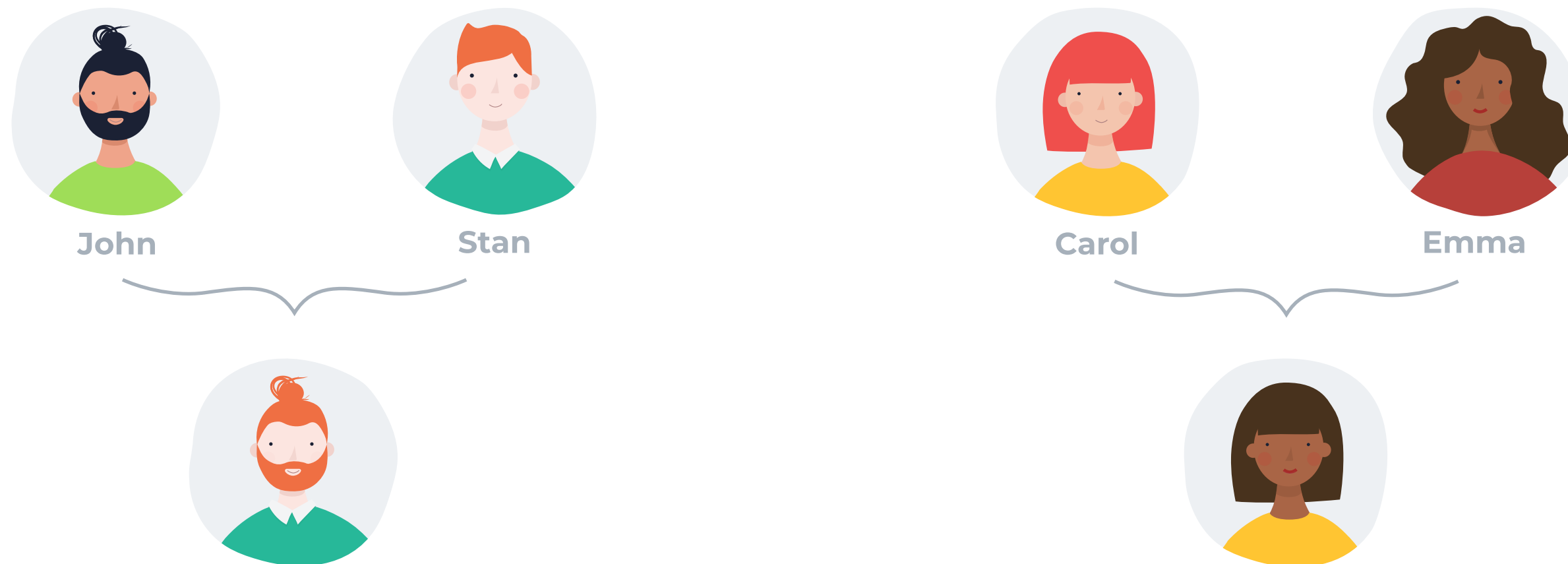
Step 4: Put all research participants on each scale

Note that all the data is **relative**. So it's essential to compare participants and their behavior. Put every participant on the scales to identify patterns.



HOW TO DEFINE PERSONAS

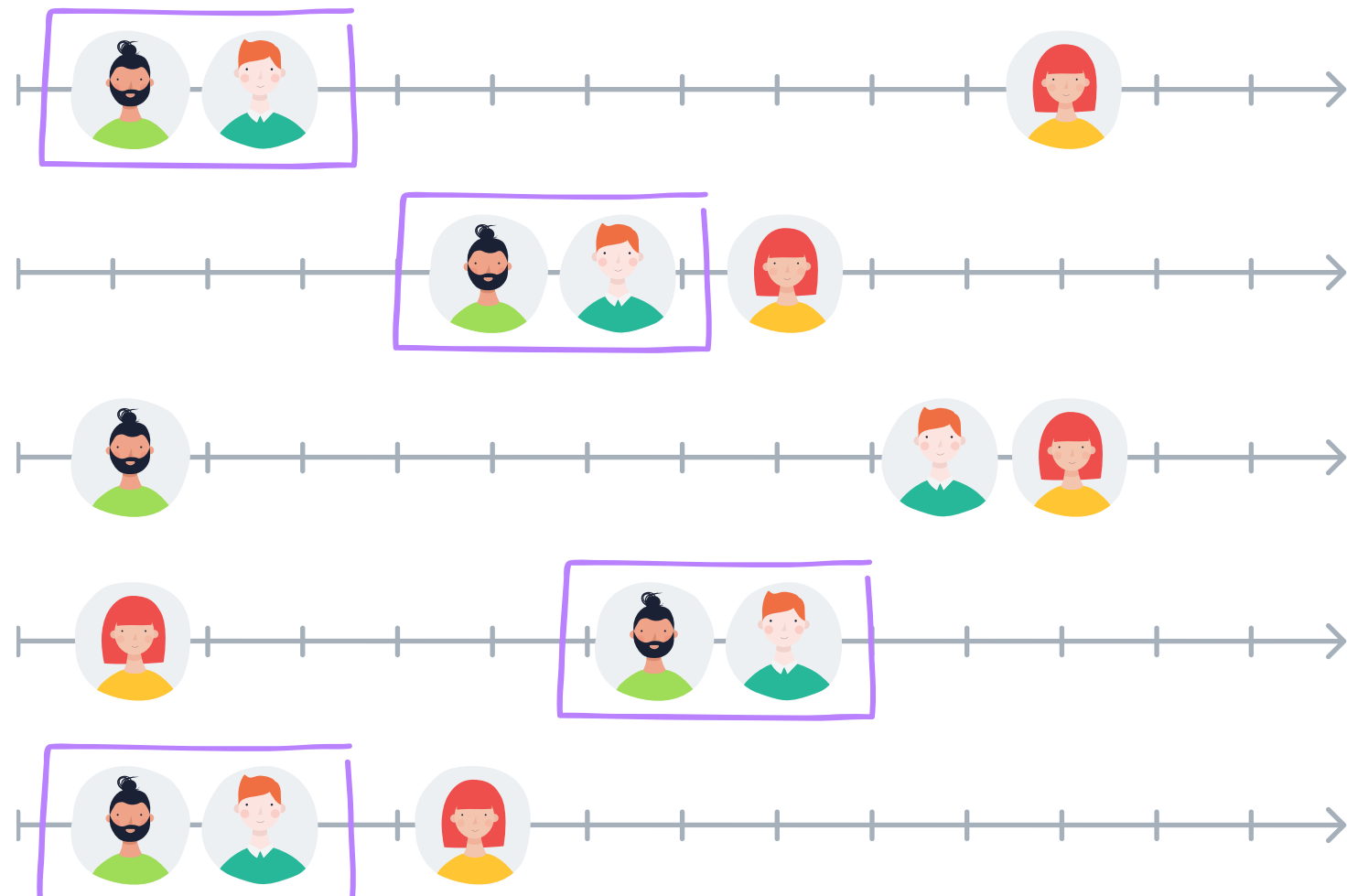
Looking at the scales, you'll notice that two participants (John and Stan) appear in the same position three times, once near each other, and once in different positions. That signals that John and Stan tend to be similar people, and you should use one persona to represent them. Other participants might also be in similar positions (e.g., see Carol and Emma), but their placement is different from the one of John and Stan. Use different personas to represent them.



HOW TO DEFINE PERSONAS

Step 5: Identify patterns

The same people who appear on the same or similar places on 5-9 scales constitute a pattern, laying a foundation for a to-be-formed persona. Make sure that every pattern you identify is logical and explainable.



Note: every unique behavioral/attitudinal pattern you identify among research participants must serve as a source for a persona

BUILDING PERSONAS IN UXPRESSIA

BUILDING PERSONAS IN UXPRESSIA

Having categorized your customers into groups, go ahead with creating personas. Start with defining sections to place all the information that accurately describes each group.



BUILDING PERSONAS IN UXPRESSIA

Step 1: Define the layout

It's the persona's type and purpose that together determine the choice of sections for each persona.

Choose the sections you need from UXPressia's ready-to-use set of sections or take advantage of our pre-filled templates (e.g., a [buyer persona template](#)).

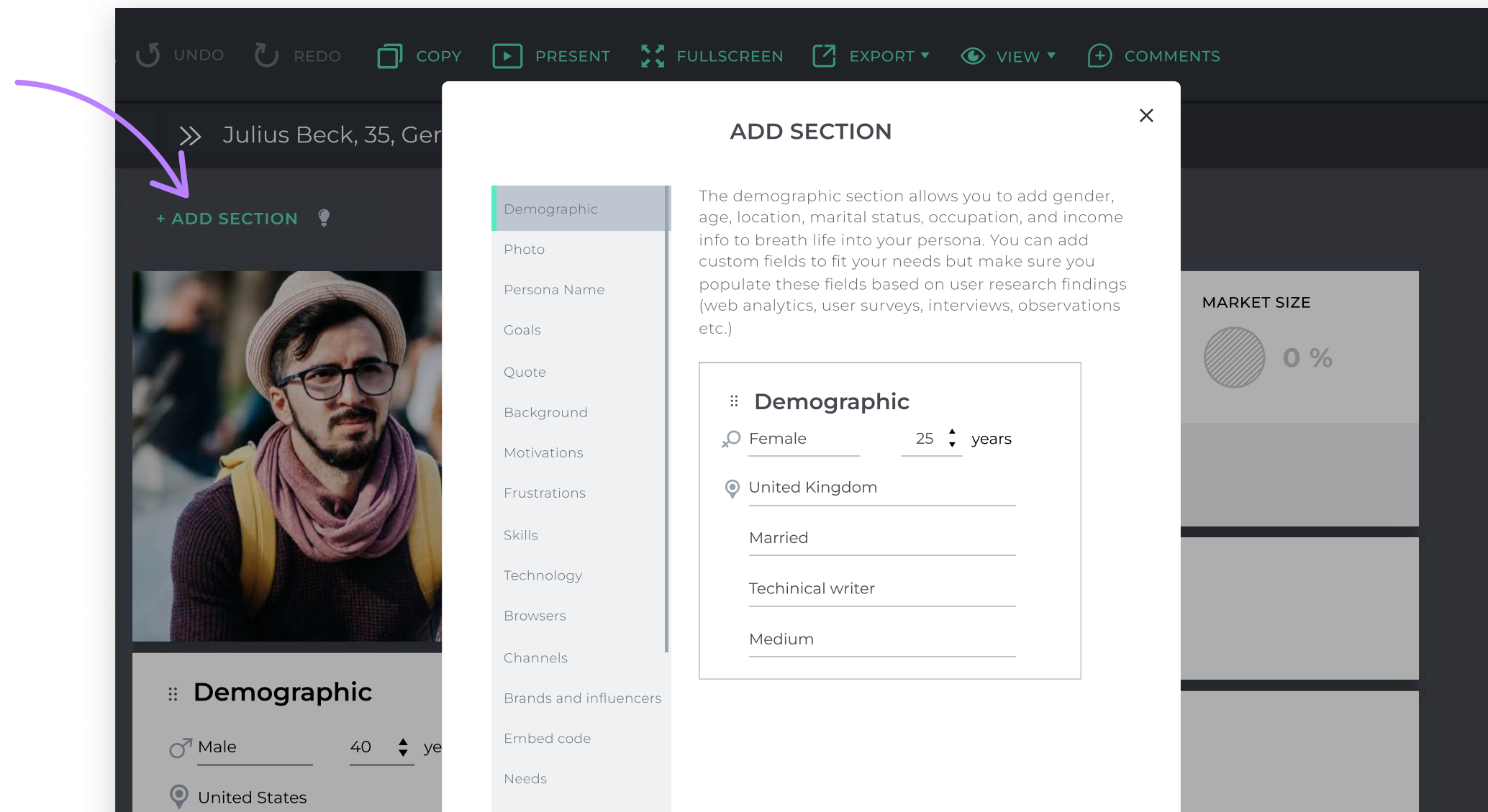
The image displays three overlapping persona templates from UXPressia:

- Persona 1 (Left):** A generic template with sections for Demographic (Gender, Location, Marital status, Occupation), Goals, Quote, and Background.
- B2B buyer persona (Middle):** A template featuring a photo of a woman and sections for Demographic (Female, 40 years), Organization, Role in the business, Drivers and needs, Fears and challenges, and Goals.
- Persona best practices (Right):** A template with a market size indicator at 100% and sections for Background, Goals, Skills Tips, and Quote.


BUILDING PERSONAS IN UXPRESSIA

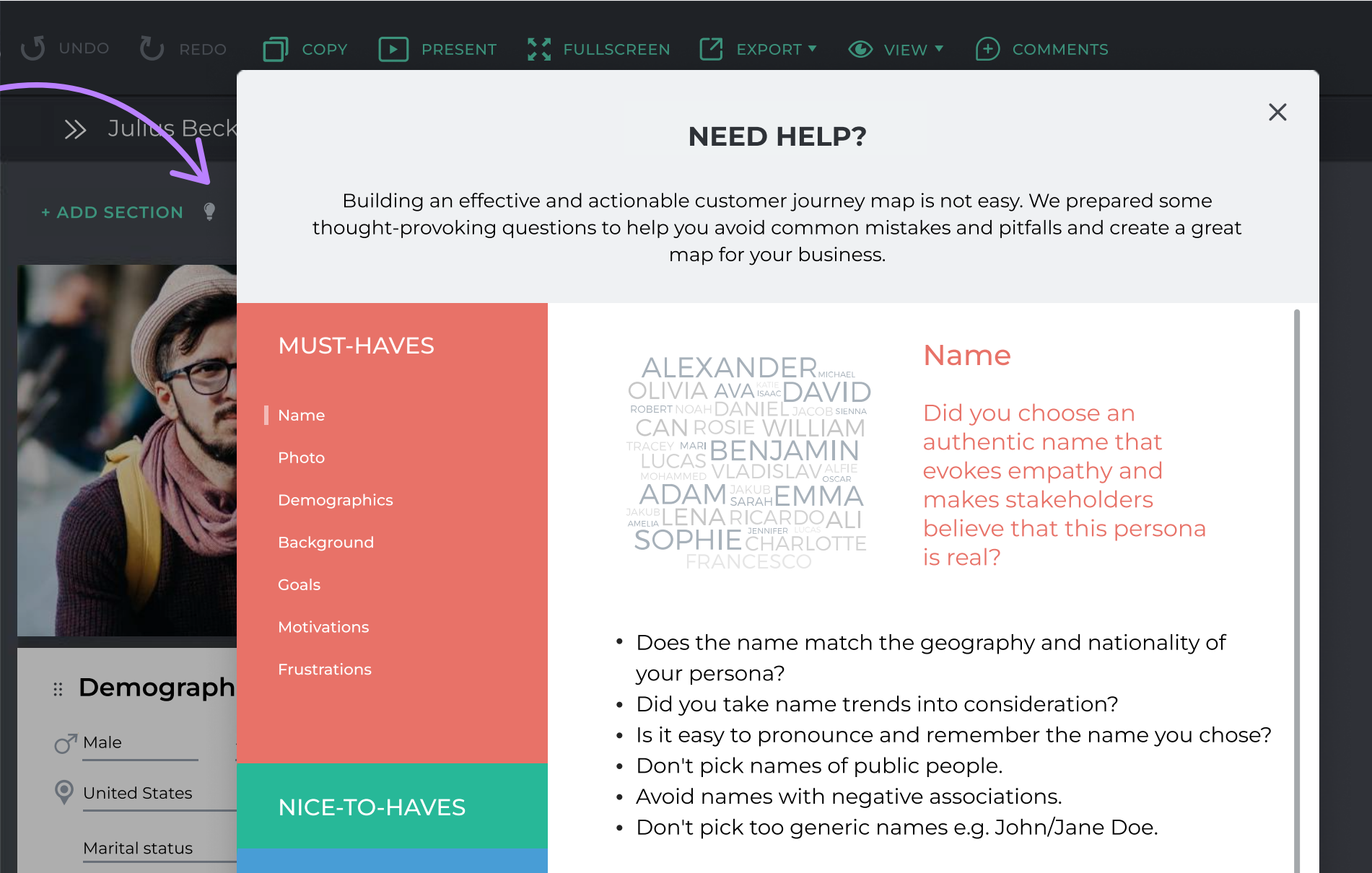
You can see all the sections available within our tool by hitting the + ADD SECTION button in the upper left corner of the persona editor.

The list of all available sections with examples will show in the pop-up window.




BUILDING PERSONAS IN UXPRESSIA

If you are still unsure which sections to add to your persona, check out our tips, which open up once you click on the bulb  icon.



UNDO REDO COPY PRESENT FULLSCREEN EXPORT VIEW COMMENTS

>> Julius Beck

+ ADD SECTION 

NEED HELP?

Building an effective and actionable customer journey map is not easy. We prepared some thought-provoking questions to help you avoid common mistakes and pitfalls and create a great map for your business.

MUST-HAVES

- Name
- Photo
- Demographics
- Background
- Goals
- Motivations
- Frustrations

NICE-TO-HAVES

Name

Did you choose an authentic name that evokes empathy and makes stakeholders believe that this persona is real?

- Does the name match the geography and nationality of your persona?
- Did you take name trends into consideration?
- Is it easy to pronounce and remember the name you chose?
- Don't pick names of public people.
- Avoid names with negative associations.
- Don't pick too generic names e.g. John/Jane Doe.

Demograph

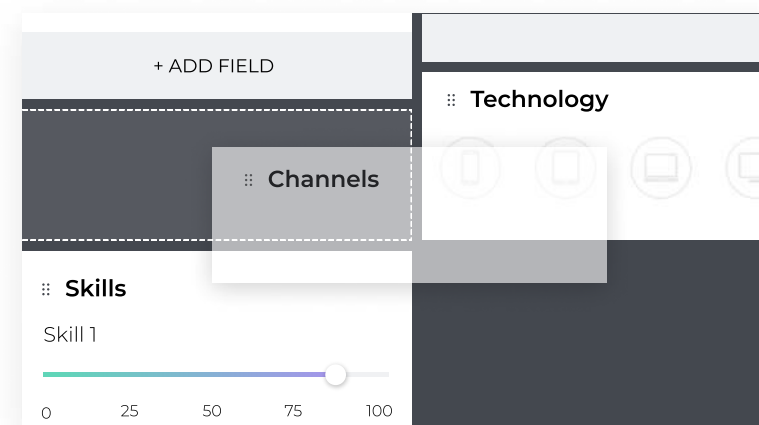
♂ Male

United States

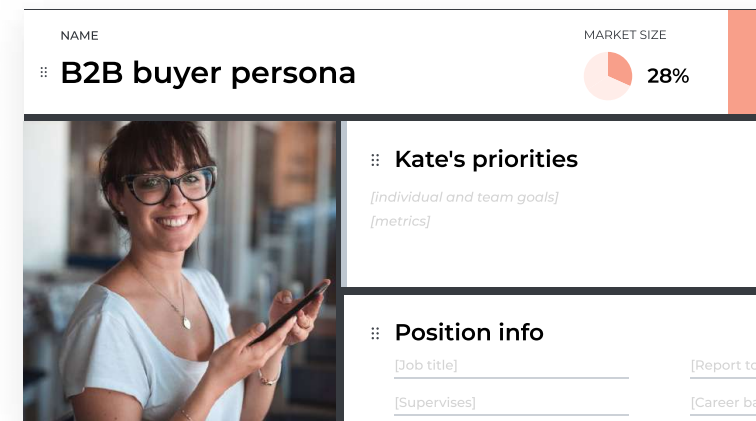
Marital status

BUILDING PERSONAS IN UXPRESSIA

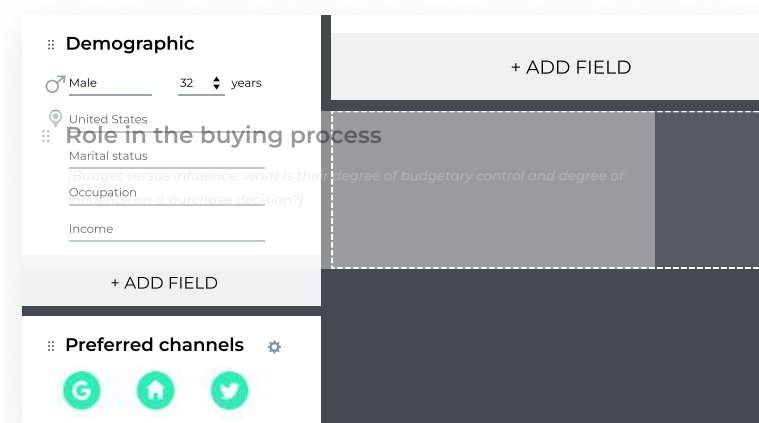
You can customize the layout of your persona different ways :



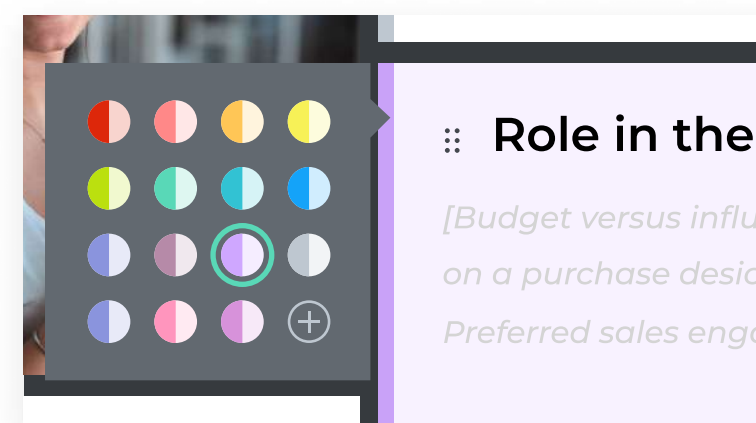
Reorder sections by dragging and dropping them



Edit section titles



Change columns' width to fit the content



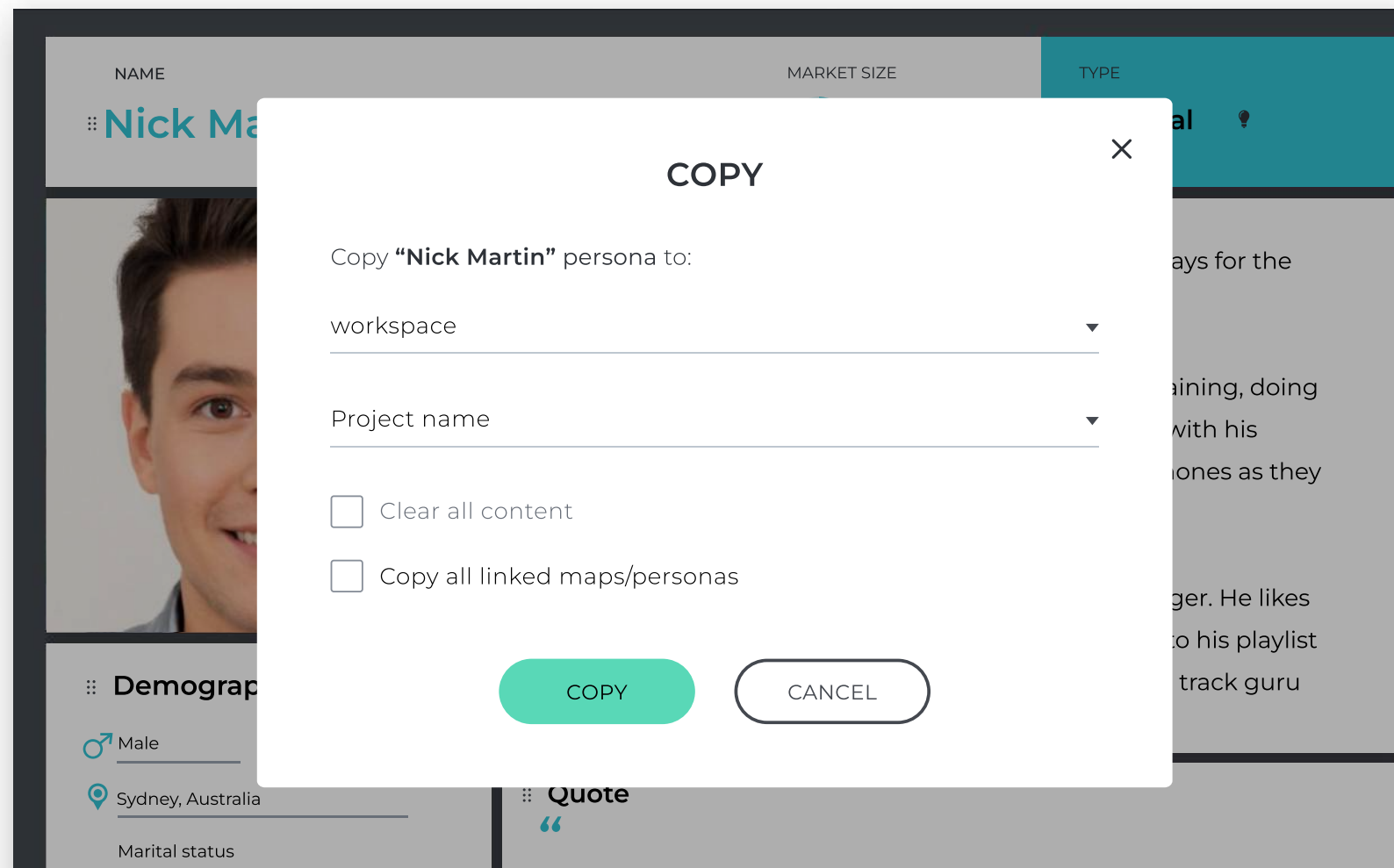
Change the color of tiles.
Open the palette by hitting the tiny stripe located on the left of the tile

Learn more about how you can customize persona on our [Help Center](#).

BUILDING PERSONAS IN UXPRESSIA

Step 2: Turn your first persona into a template

Consistency is vital in any project, and it's reasonable to keep to the same persona structure from the very beginning. Work with your team to develop a persona structure that everyone is happy with, and make a copy of this persona so that you'll be able to use it as a template for all future personas.



QUICK TIP:

Create a project titled "Templates" to store all of your templates in it

BUILDING PERSONAS IN UXPRESSIA

Step 3: Name your persona

To quickly locate your persona, give it a meaningful name. In most cases, you can go either with a fictional First Name + Last Name (e.g., Ronald Murphy) or with a short name for the group (e.g., Impulsive shopper). The first option helps to develop empathy, while the other option gives you insight into personality traits. And, of course, you can have both:

The image shows a screenshot of the UXPressia interface. At the top, there is a persona card for 'IMPULSIVE SHOPPER' with the name 'Ronald Murphy' in orange. The card also displays 'MARKET SIZE' as 28% with a pie chart and 'TYPE' as 'Organizer' with a lightbulb icon. Below this, a purple arrow points from the 'NAME' field of the persona card to a 'GENERATE NAME' dialog box. The dialog box has a title 'GENERATE NAME' and a close button 'X'. It contains a 'Choose from UIFaces preset' section with a 'GENERATE' button. Below that is a location dropdown set to 'united states' and three radio buttons for 'All', 'Female', and 'Male', with 'Male' selected. The generated name 'Ronald Murphy' is displayed, and there is a green 'ADD' button at the bottom.

QUICK TIP:

Use UXPressia's [name generator](#) to create a name for your persona

BUILDING PERSONAS IN UXPRESSIA

Step 4: Add a photo

Another thing that helps to empathize with customers/users is adding a persona's photo to the profile. To add a photo to your persona, use UXPressia's [photo generator](#) or any other photo you wish to use.

The screenshot displays the UXPressia interface for building a persona. A central dialog box titled "ADD PERSONAS PHOTO" is open, offering two main options: "UPLOAD IMAGE" and "Choose from UIFaces preset". The "Choose from UIFaces preset" option is selected, and it includes radio buttons for "All", "Female", and "Male" (which is currently selected). Below these options are four circular photo thumbnails of diverse individuals. The background shows a persona profile for "Ronald Murphy" with fields for demographic information (Gender: Male, Age: 22, Location: United States) and skills.

QUICK TIP:

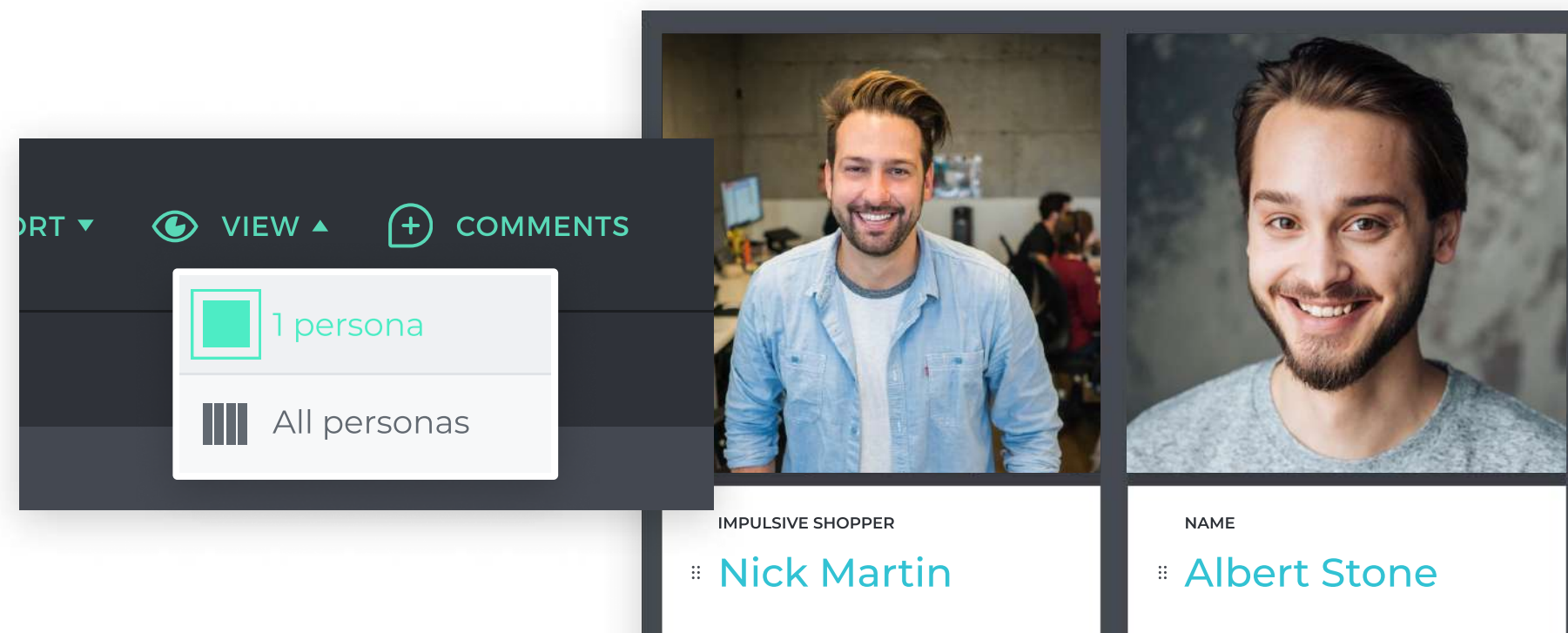
When picking a photo, avoid using staged shots or photos of famous people and team members

BUILDING PERSONAS IN UXPRESSIA

Step 5: Start with a quick draft

It's always a good idea to begin with:

- Persona's goals as they drive persona's behavior and explain why they act in a certain way. Plus, they shed some light on their expectations.
- Motivations: What drives the persona (concerning your product/service)?
- Frustrations: What makes them unhappy/angry? Or what makes their tasks more challenging?



QUICK TIP:

Switch to the [Multipersona view](#) from time to time and compare the same sections for different personas. That might give you some more insights and help to underline the difference between them.

BUILDING PERSONAS IN UXPRESSIA

Step 6: Gather more data


Once you write down everything off the top of your head, it's time to go deeper.

Add actual customer quotes that you heard during the interview, upload images that demonstrate personas' working environment (or examples of the content they create). Then leverage marketing data to estimate the market size and add it to the profile and use web analytics to add technology/browser details.

NAME


Albert Stone

MARKET SIZE

 28%

TYPE

Rational



Goals

Build a career as a Production Manager.

Background

Past position: Production Manager, manages a team of 12 people.


Experience: 3 years at an enterprise.


Desired salary: \$75,000-90,000/year.


Albert has been working at the same company for three years. He asked his boss for promotion many times.


Albert decides to change job.

Technology



Apple



Windows



Windows



Windows


Browsers


Type here




Type here


Type here


Type here


Type here

Demographic

 Male 32  years

PRESENTING PERSONAS

PRESENTING PERSONAS

Once the personas are ready, you can present them to your team or client. In this section, you will find some tips on how to prepare your personas for a presentation.

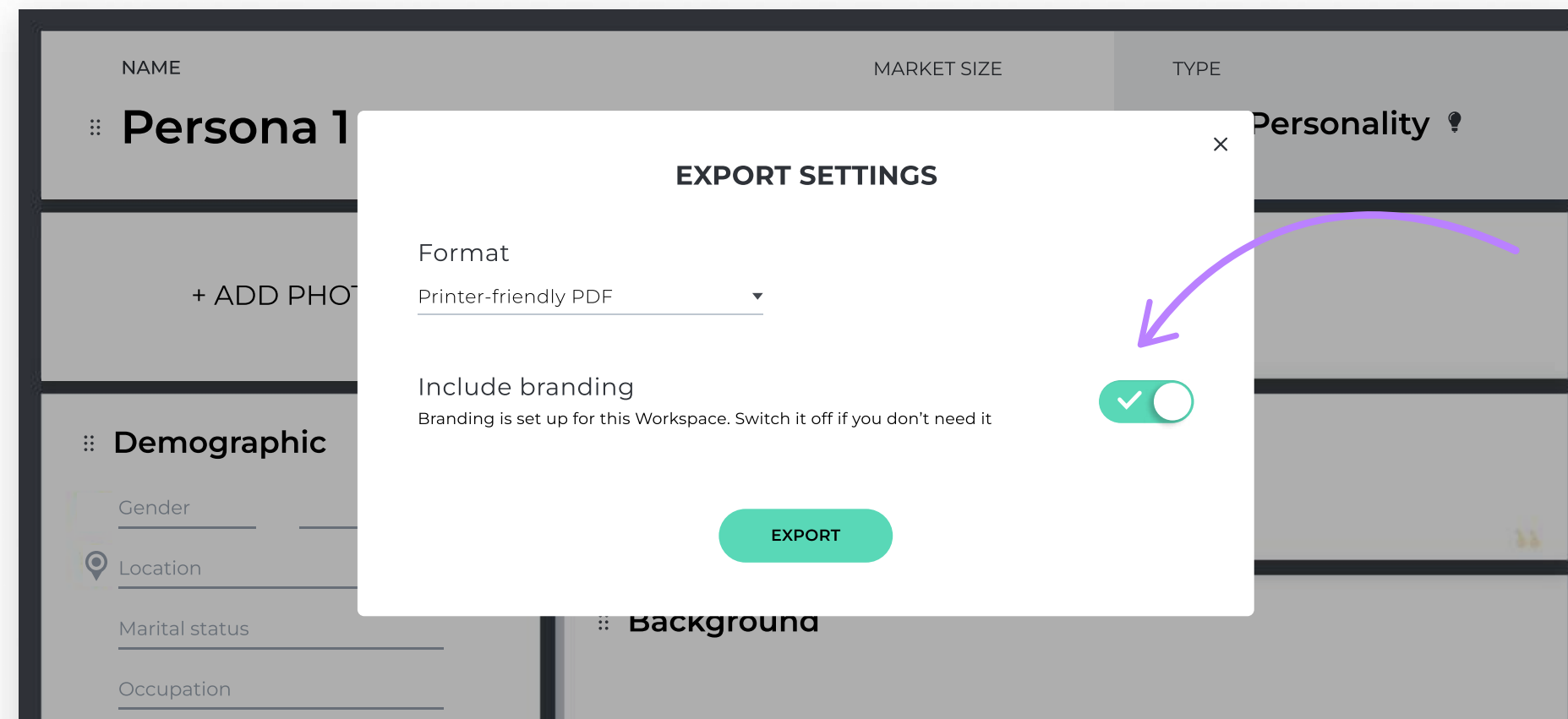


PRESENTING PERSONAS

Tip 1: Polish your personas

Make personas visually appealing before taking them to a meeting. Add some style to your text and set color accents to make an impact on the audience.

Feel free to add some [brand flavor](#) to your personas. With UXPressia, you can brand your exports by putting your logo on the top of your persona or map and setting a custom color for the branding stripe behind the logo.



PRESENTING PERSONAS

Tip 2: Present in person or online

Whether you present your persona in person or online using screen sharing, take advantage of the [presentation mode](#) to have quick view access to all personas within your project folder, zoom them in and out, and go fullscreen if needed.

The screenshot displays a software interface for managing personas. At the top, a dark header bar shows "PROJECT: untitled" and "PERSONA: Albert Stone" with a close button (X) on the right. On the left, a vertical sidebar lists four personas: Nick Martin, Albert Stone (selected), Alex Fox, and All Personas. The main content area is divided into several sections:

- NAME:** Albert Stone
- MARKET SIZE:** 28% (represented by a pie chart)
- TYPE:** Rational (with a help icon)
- Goals:** Build a career as a Production Manager.
- Background:** Includes "Past position: Production Manager, manages a team of 12 people.", "Experience: 3 years at an enterprise.", and "Desired salary: \$75,000-90,000/year." Below this, a paragraph reads: "Albert has been working at the same company for three years. He asked his boss for promotion many times." and "Albert decides to change job."
- Demographic:** Male, 32 years, United States, Marital status.
- Browsers:** (Section header visible)

Navigation and control elements include a zoom slider on the right showing 93%, a fullscreen button, a back button, and a "2/4" indicator at the bottom.

PRESENTING PERSONAS

Presenting your persona in the editing mode might be a good idea, too, if you want to capture feedback from the team on the go. You can leave quick notes within the textboxes using the commenting mode, or switch between personas as you present.

The image shows a user interface for editing a persona. The main content is divided into sections: **Goals** (Build a career as a Production Manager.), **Background** (Past position: Production Manager, manages a team of 12 people. Experience: 3 years at an enterprise. Desired salary: \$75,000-90,000/year. Albert has been working at the same company for three years. He asks for promotion many times. Albert decides to change job.), **Technology**, and **Browsers**. A commenting overlay is active, showing a comment from 'ann.rslk@gmail.com' with the text 'Add more details about background'. The overlay includes a text input field, a 'POST' button, and a 'CANCEL' button. To the right, a 'COMMENTS' sidebar shows the comment and '0 replies'.

Goals

Build a career as a Production Manager.

Background

Past position: Production Manager, manages a team of 12 people.

Experience: 3 years at an enterprise.

Desired salary: \$75,000-90,000/year.


Albert has been working at the same company for three years. He asks for promotion many times.

Albert decides to change job.

Technology

Browsers

COMMENTS [All \(1\)](#) Open (1) Resolved (0)

1  ann.rslk@gmail.com a few seconds ago

Add more details about background

0 replies

ann.rslk@gmail.com

Add more details about background

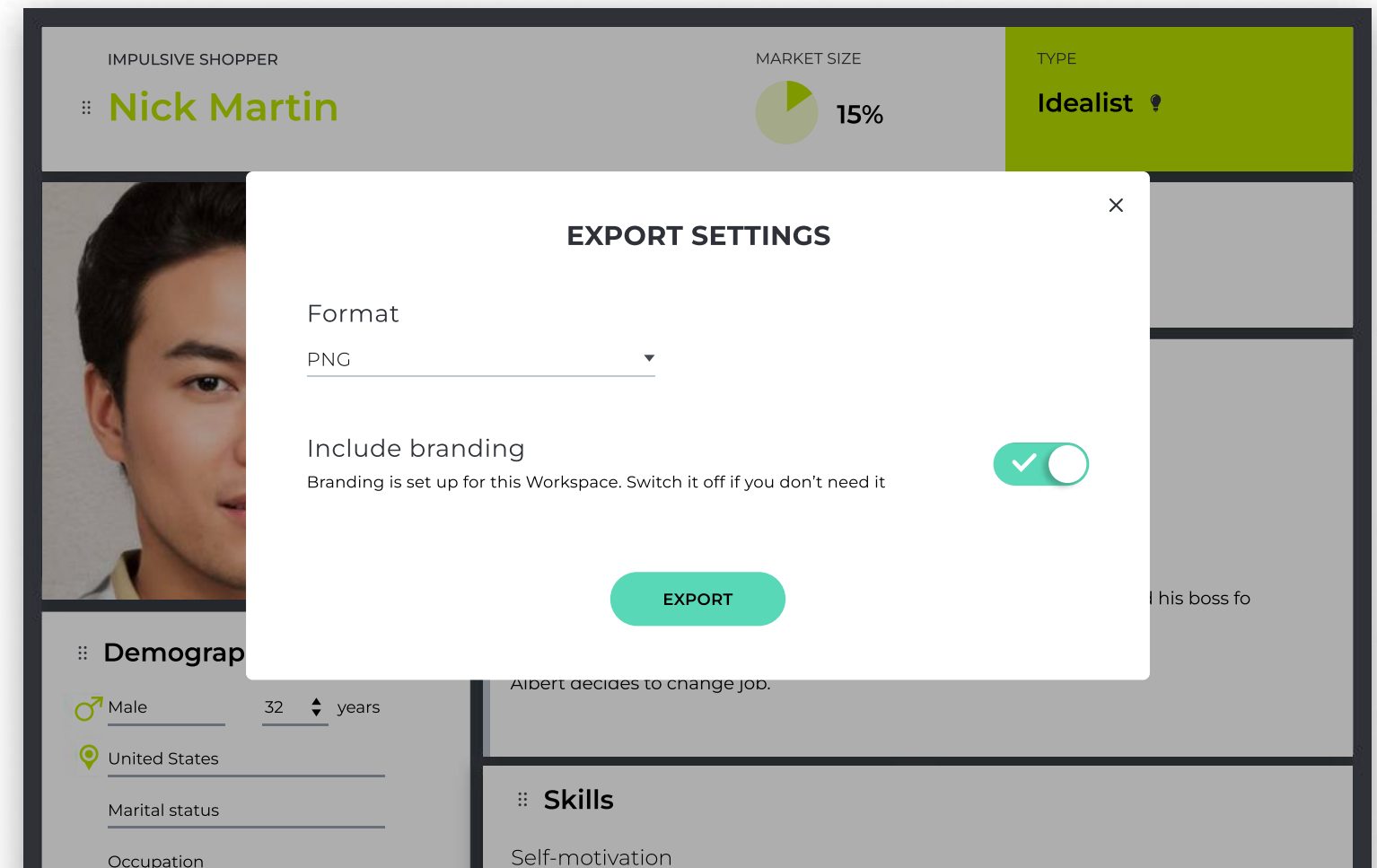
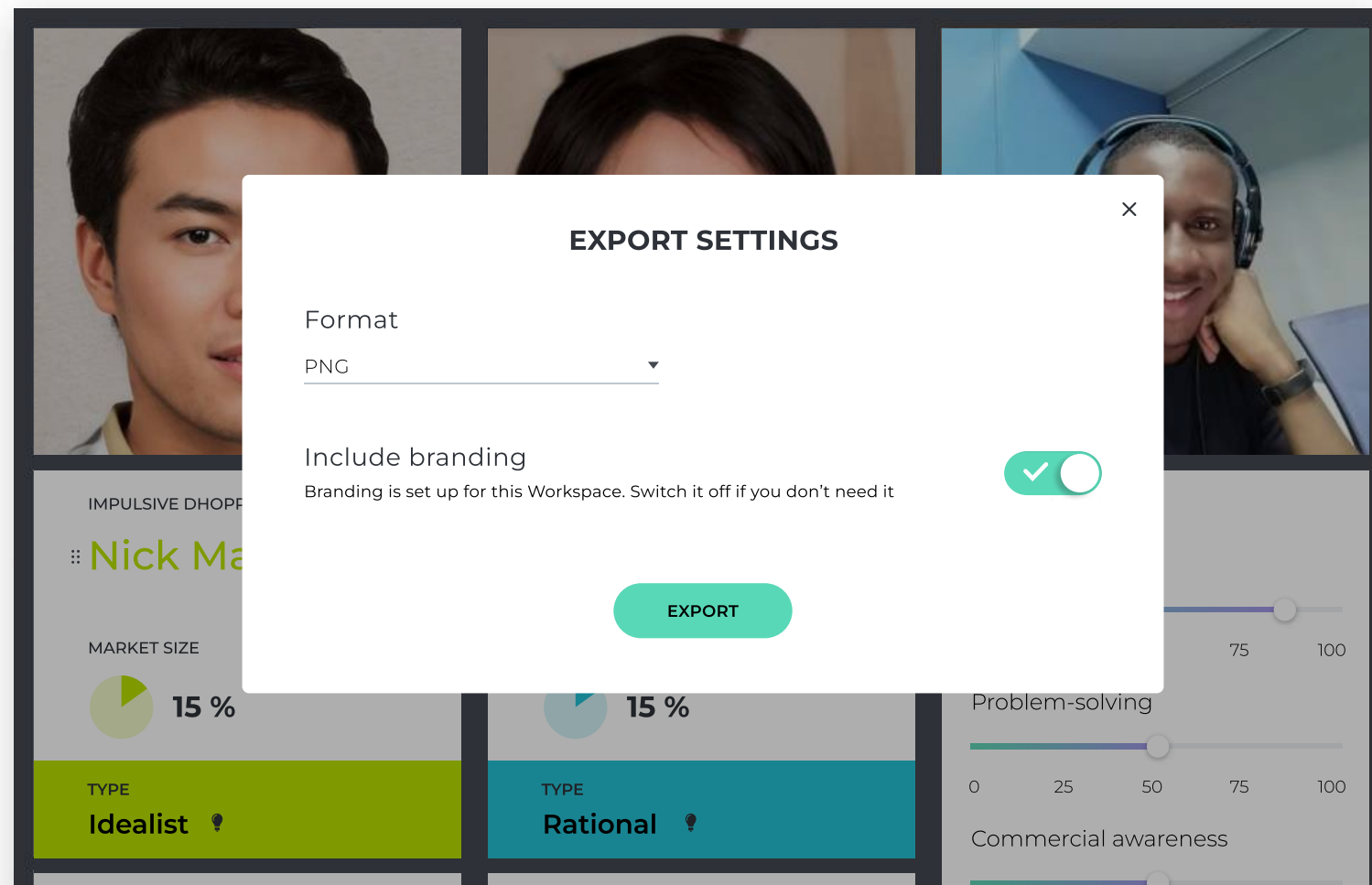
Markdown supported: **bold** *italic* etc. Reply: Ctrl+Enter

CANCEL POST

PRESENTING PERSONAS

Tip 3: Export personas

Demonstrating personas online is not the only way to present your insights. You can also [export your persona](#) to a PNG or vector-based PDF file. Once the file renders in a new tab, you'll be able to save it to your computer and then send the file to your team or client as a file. We recommend having each persona separately and a single sheet with all personas overview.



PRESENTING PERSONAS

Tip 4: Print your personas

[Printing your personas](#) and hanging them in your office can help you keep the entire team on the same page. This will also help you collect feedback as people in the company will be able to put sticky notes with their ideas on printed personas.

To print a persona, it's best to use a printer-friendly PDF version. As it's fully vector-based, the persona will scale to any size without losing the quality.



KEEPING PERSONAS ALIVE

Personas will have value only if you keep them updated and make a part of your workflow. Otherwise, your personas won't bring about lasting quality changes. Here's how you can use UXPressia to create personas that won't end up on the shelves:

KEEPING PERSONAS ALIVE

Engage the teams

Customer-centric transformation can only be achieved when you engage the entire company in the process and make sure that people across all the departments know what their customers look like. We built our platform to help you collaborate with the team and share your insights across organizational silos. Here are some of the features that UXPressia offers:

- **Real-time collaboration**

In UXPressia, you can collaborate in real-time with an unlimited number of users on the same document. Each collaborator will see every change in the document once it's made. You can use this feature to run fully digital workshops and brainstorm sessions. Your team can be thousands of miles away while still being in the same virtual room with your digital “sticky notes”.

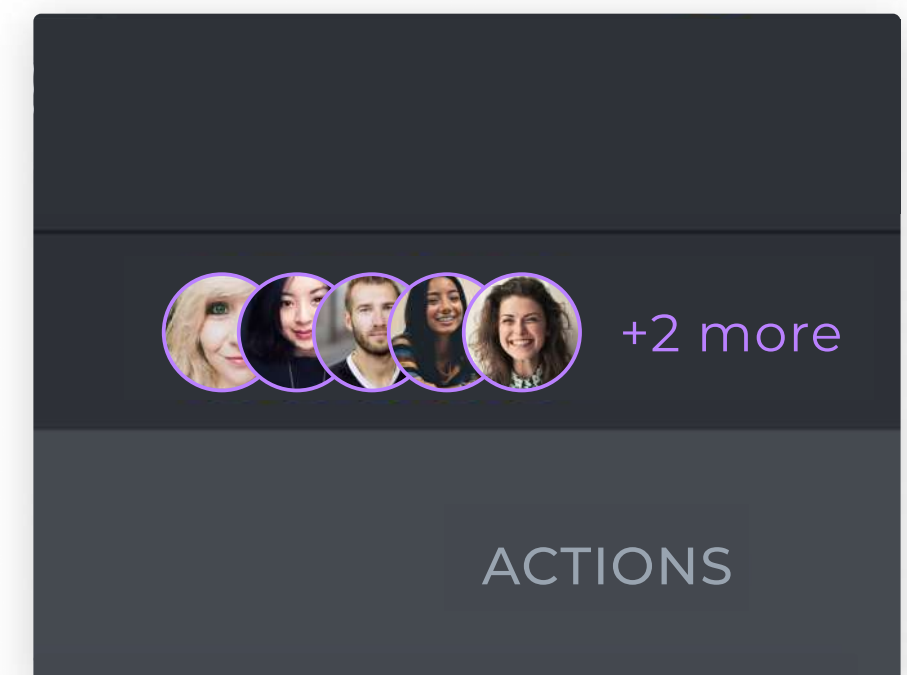
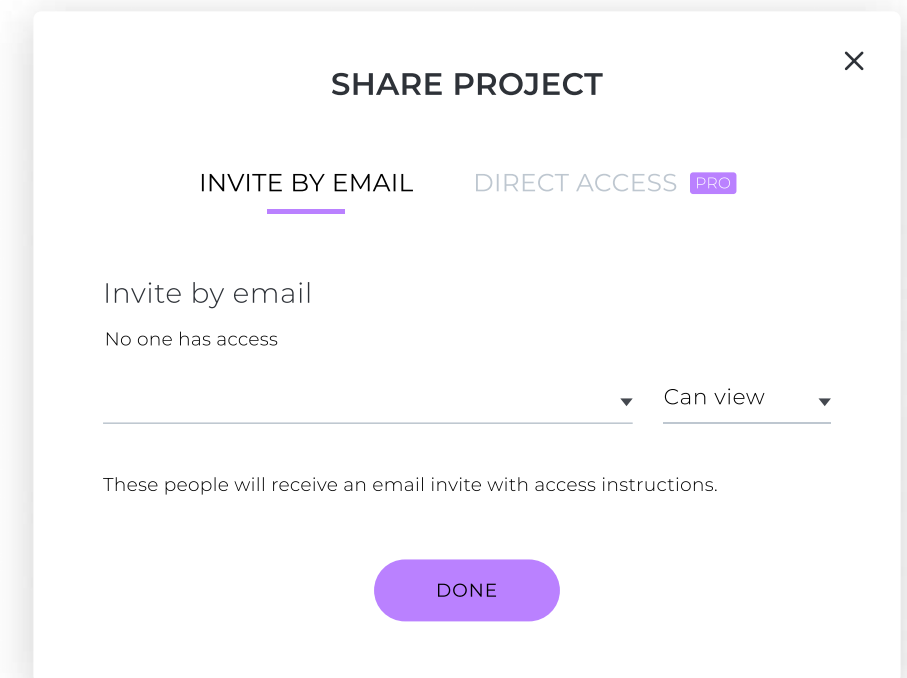
KEEPING PERSONAS ALIVE

- **Project sharing**

You can invite your teammates to your projects via [email](#) or a [direct link](#). The latter will let you share projects with those who don't have an account at UXPressia. It's perfect for those cases when you need to quickly share your work with someone who needs one-time access to view your persona or make edits in it.

- **Setting up a team workspace**

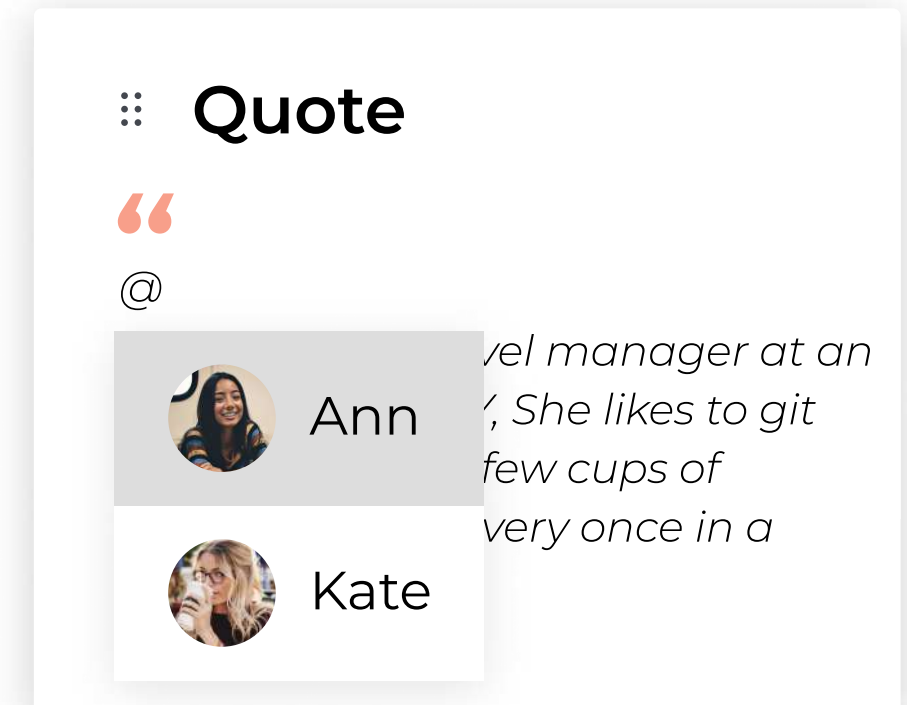
If you have a core team that creates and updates personas regularly, you can [invite them](#) to your workspace. Users with the Contributor role will get full access to all platform's capabilities, while [Viewers](#) will be able to view projects, maps, and personas and leave comments.



KEEPING PERSONAS ALIVE

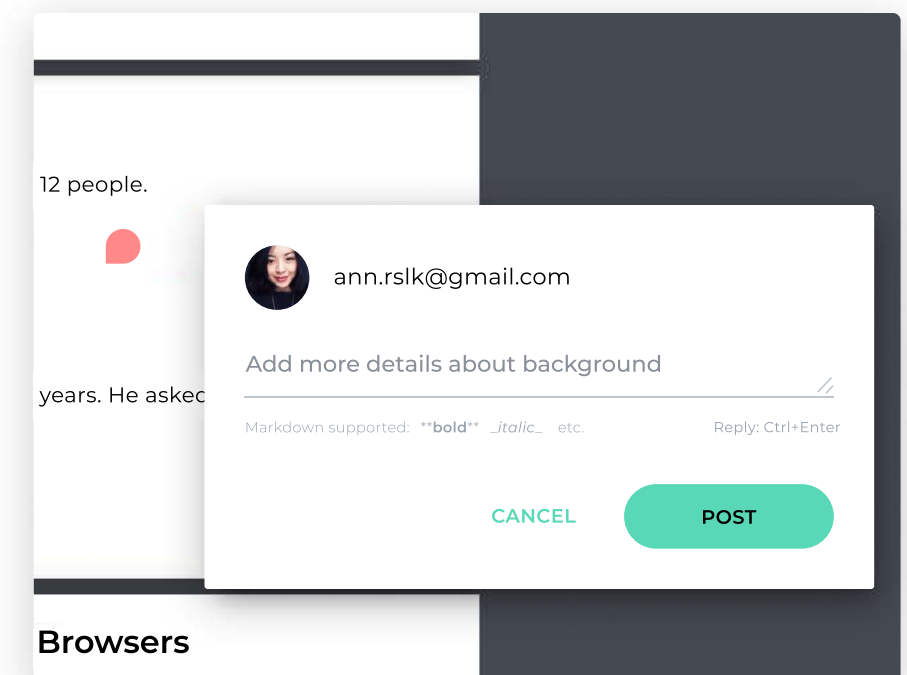
- **@ Mentions**

[Mentioning](#) teammates will help you assign tasks to them or indicate who suggests a specific idea. Type @ inside any text box, and you'll be prompted with a drop-down list with all the teammates who have access to this project. The person you mention will be notified both via email and inside the app.



- **Commenting**

UXPressia lets you [leave comments](#) across personas, resolve them, start threads, and mention teammates. All that happens in real-time, so you can use this functionality to discuss CX insights with your team and clients. And the best thing is that they don't need to be workspace contributors to participate.



KEEPING PERSONAS ALIVE

- **Slack integration**

[Integrate](#) UXPressia with the Slack channel that your CX team uses to help everyone in it get instant updates on any persona-related activity and stay connected all the time.



Slack

Send notifications about important events such as adding new maps/personas, sharing updates and comments to Slack

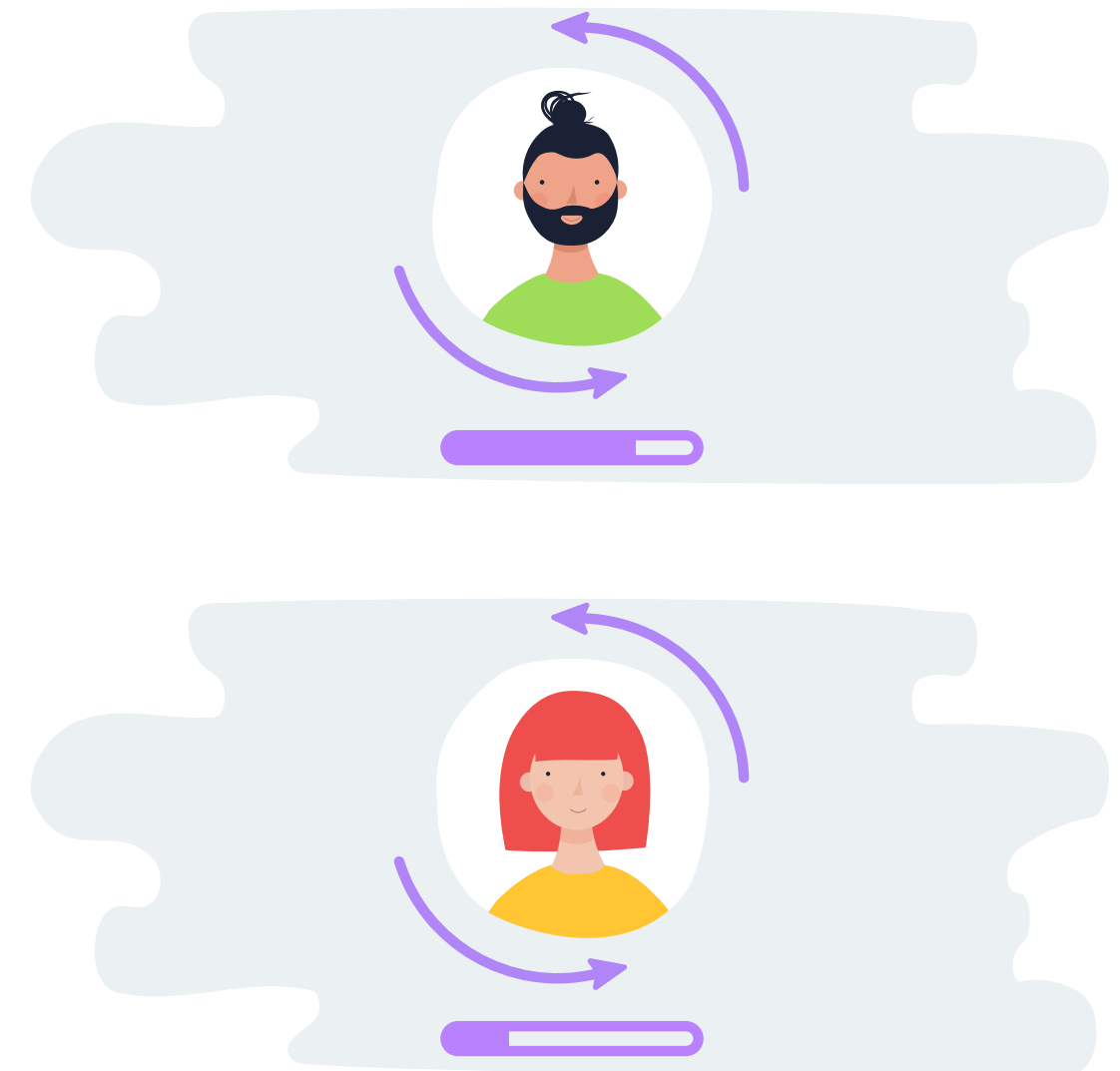
CONNECT ACCOUNT

KEEPING PERSONAS ALIVE

Regularly update your personas

Your customers and business continuously evolve, and so should your personas. Keeping them up-to-date will ensure that you have the latest insights and that you and your team see the as-is state, rather than used-to-be.

Revisit your personas once in a while to see what changed since you last opened them and to brainstorm for more ideas around delivering a better experience to your customers.



[Discover more ways on how to make your personas actionable.](#)

Need more tips on creating effective personas? Take [the Personas course](#).

APPENDIX

APPENDIX

User interview template

1. Getting to know the user

- Please tell me about your job.
- How and why did you choose this career?
- How long have you been working in the current role?
- Why do you work for this company?
- What's your company's industry, and what's your role in it?

2. Domain knowledge

- What skills help you do your job?
- How do you keep up with your job and industry?

3. User goals

- Please describe your job duties.

- How do you define success or progress in your job?
- Are there any metrics that you use to measure it?

4. Attitudes and motivations

- What do you love about your job?
- What do you value most in your job?
- What motivates you to do a good job?

5. Work processes

- Please describe your typical workday. What do you do?
- How do you perform the following task: ...? Please describe every step you take.
- How much time do you typically spend on such a task?
- Can you show me how you do [a task]?
- What are the major tasks that take up most of your time at work?

APPENDIX

- What activities are vital to your success?
- Is there anything that you do during your typical workday because of the industry you are in or your company?
- Have you developed any processes on your own? What are they?
- Does learning from your colleagues help you work better?

6. Working environment

- Is your office organized to help you complete your tasks and reach your goals?
- How do you use the office to accomplish your goals and tasks?

7. Pain points

- Are there any difficulties or challenges that you deal with at work? Is there anything that annoys or frustrates you?

- Do you forget about work when you are not working? Are there any issues that you keep on thinking about when your working day is over?

8. Technology and tools

- Is your office organized to help you complete your tasks and reach your goals?
- How do you use the office to accomplish your goals and tasks?

9. User's mental model

- In your opinion, what types of people are the right fit for your position? Why?
- Describe [a process] and give details on whether it has changed over time. Describe the changes if there are any.

APPENDIX

10. Organizational structure and relationships

- Is there someone you interact with at work? Please don't mention your clients and customers.
- To whom do you report?
- Who reports to you?
- Do you usually work on your own or collaborate with your colleagues?
- How do you collaborate with others?

11. Closing out the interview

- Is there anything you would like to share or anything else you would like us to know about you?
- Do you have any questions?

Learn how to ask the right questions during a customer interview with our [practical online course](#).

Thank you

Get in touch with us to start your journey with UXPressia.

support@uxpressia.com

We are looking forward to having you aboard!

