

Presented by



Lasselle-Ramsay

Personas: A 360° Approach to Understanding Users

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Prepared for



SOCIETY FOR TECHNICAL COMMUNICATION


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Why Is Knowing the User Important?




Context is Everything

How to Improve Productivity at our Regional Manufacturing Facilities



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How to Have a Green Thumb



Count the F's

- How many F's?

FEATURE FILMS ARE THE RESULT OF YEARS OF SCIENTIFIC STUDY COMBINED WITH THE EXPERIENCE OF YEARS.

Finding Information Isn't An Intelligence Test

- **Getting the information you need shouldn't be like finding F's.**

The Goal: Information That Works for the User

Information design
enables you to
deliver the

RIGHT CONTENT

at the

RIGHT TIME

in the

RIGHT FORM

to the

RIGHT PEOPLE

User

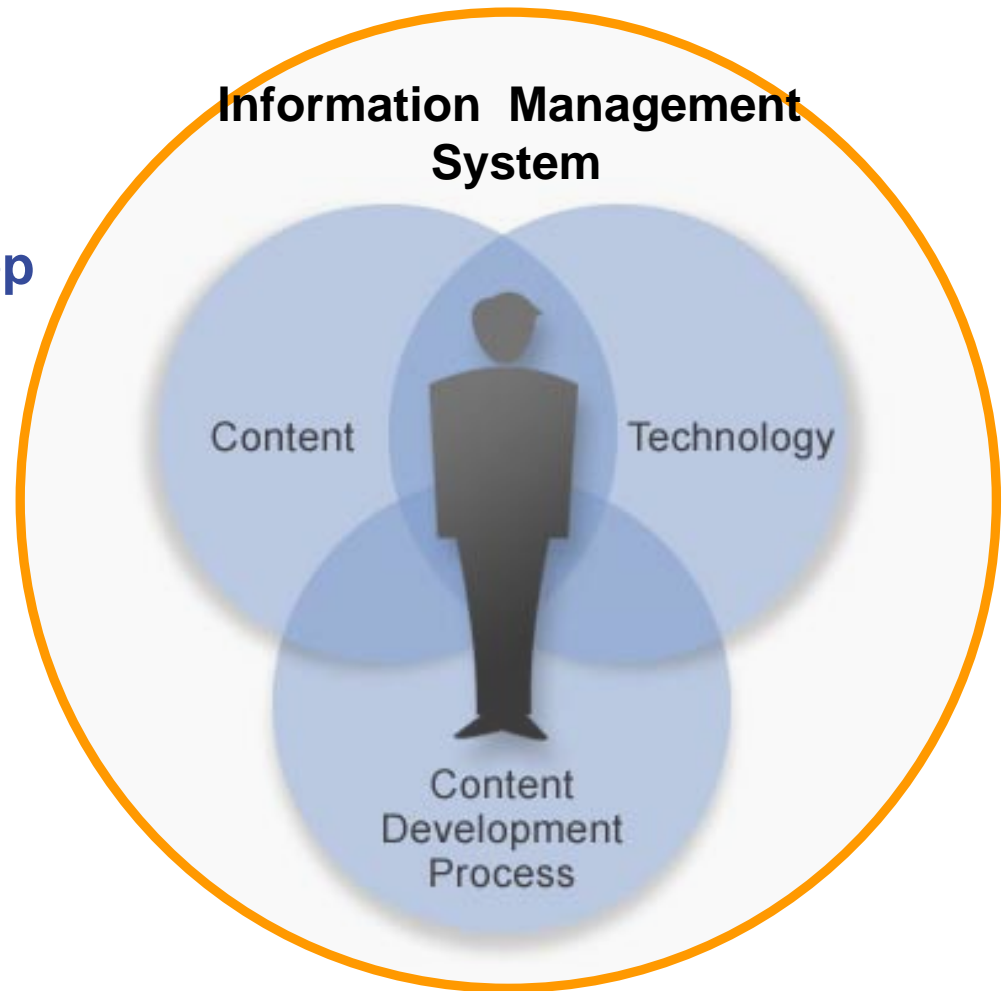
- Targeted to needs to drive job performance
- Accelerated job skills and knowledge
- Improved customer experience

Information Architect

- Leverages content through reuse
- Lower development and maintenance costs
- Faster development time

A Systematic Approach That Begins with the User

- **Profile the user**
- **Audit content and develop information model**
- **Select tools to develop and deliver content effectively and efficiently**
- **Map the content development process to the information lifecycle**
- **Perform iterative assessment**



User-Centered Information Design

Creating an information design that works for users

- **User personas**
- **Task analyses**
- **Scenarios**

Begin with Personas

- **What are user personas?**
 - A rich description of each key audience group based on
 - > Behavior patterns
 - > Goals
 - > Skills
 - > Attitudes
 - > Environment

Build the Personas

- **Identify all groups**
 - Look across functional areas
 - Account for global differences
- **Collect data**
 - Structured interviews and observation
- **Analyze data**
- **Build personas**
 - Make them real
 - Give them a face, a name, and a voice

Profile Components

- **Demographic description**
- **Job responsibilities**
- **Technical profile**
- **Personal profile**
 - Goals, needs, and anxieties
 - Problem-solving approach
- **Learning style**
 - Basic learning approach
 - Best and worst learning experience
 - Obstacles to attaining proficiency
 - User's assessment of when they are fully trained

Clinician Persona



Dr. Vlck

Clinician

"The less you use the device, the less time you're interested in investing in it."

Age: 44

Education: M.D., University of Minnesota Medical School

Certifications: Internal Medicine, Cardiology. F.A.C.C.

Years in the field: 16

Does about 6 or 7 usually ad-hoc IVUS cases a week as the primary operator. Consults on a few more cases each week.

- **Work environment**
- **Learning environment**
- **Information and learning needs**
 - Theory
 - Advantages
 - Hands on
 - Advanced interpretation

Operator Persona



Vicki
Operator

"Doctors are so dependent on the techs. That's why it's so important to know the ins and outs, to be able to troubleshoot."

Age: 31

Education: AS in Radiology, certification in ultrasound

Title: Cardiovascular technician

Years in the field: 5

Spends most of the day in the cath lab doing cases. Uses Galaxy 2 to 3 times a week.



- **Work environment**
- **Learning environment**
- **Information and learning needs**
 - Hands on
 - Troubleshooting
 - Accurate measurements

Conduct a Task Analysis

- **Information-processing analysis (procedural analysis)**
 - Identify tasks and subtasks
 - Identify the steps to complete each task
 - Show the relationship of tasks through a flowchart and/or outline
 - Validate tasks with users or subject matter experts
 - Map tasks to user groups

Map the Tasks to the User

Task Analysis

– 30 September 2004 • v1.2 –

Task		Clinicians	Operators	Helpers					Sellers	Approvers
				System Admin	Bio-med Tech	Field Service	Trainer	Support		
— User Tasks —										
156	Understand workflow	•	•			•	•	•	•	
9.3	Prepare the system	•	•							
9.4	Login			•		•				
9.5	Perform a session for a new case	•	•							
9.6	Create case information	•	•							
9.7	Edit or delete a usage profile	•	•							
9.8	Perform imaging	•								
150	Interpret imaging	•								
9.9	Start & stop recording for a manual run	•	•							
9.10	Start & stop automatic pullback	•	•							
9.11	Review run	•	•							
9.12	Create or delete a bookmark	•	•							
9.13	Edit a bookmark label	•	•							
9.14	Edit a run label	•	•							
9.15	Perform automatic lumen & vessel segmentation	•	•							

Create User Scenarios

- **Based on the persona and the task analysis**
- **Reflects goals and organizes tasks that link to proficiencies**
- **Based in reality: A day in the life**
- **Shows team interaction**

Create User Scenarios

Vicki



Preparing for a procedure

- 1 Vicki moves PlainView into the lab and positions it near the table.
- 2 She connects the system to the power outlet and to the monitor cable.
- 3 She connects the motordrive cable to PlainView.
- 4 She turns PlainView on and checks the start-up screen to make sure it's working properly.

Performing a procedure

- 1 Vicki creates a new case.
- 2 She enters the case information.
- 3 She puts the motordrive into a sterile drape.
- 4 She removes a catheter from its sterile packaging and flushes it.
- 5 She attaches the catheter to the motordrive.
- 6 She installs the motordrive into the sled.
- 7 She selects the correct usage profile for the catheter.
- 8 She selects a run description.

Dr. Vlk positions the catheter across the lesion. He tells Vicki to start pullback.

- 9 She starts pullback.

Images appear on the monitor. As Dr. Vlk watches them, he tells Vicki to bookmark certain frames.

- 10 Vicki creates bookmarks.

Dr. Vlk tells Vicki to stop pullback.

- 11 Vicki stops pullback.

Dr. Vlk and Vicki do several runs to give him the information he needs.

Perform Content Audit

- **Inventory existing content and learning components—identify gaps**
- **Analyze product requirements and engineering information for future products**

Develop Information Model

- **Identify content functions**
 - (background, procedure, troubleshooting)
- **Identify content elements**
 - (specific topics and procedures and troubleshooting tips)
- **Assign database IDs for each content element**
- **Validate content elements**

Build Content Matrix

Information Content Matrix

Updated: 2/1/2005

Row# for Sort Only	DB ID	Source	Content Element	Function	SME	User Manual	Setup Guide	Service Manual
1	1	GUG	01. USING THE DEVICE	Section		Include		
2	466	GUG	01A. Workflow	Subject	J Smith	Include		
3	467	GUG	General Workflow	Statement	J Smith	Include		
4	468	GUG	Alternate paths to workflow	Statement	B Jones	Include		
5	2	GUG	01B. System Setup	Subject	B Jones	Include	Include	Include
6	3	GUG	Component descriptions	Statement	J Smith	Include	Include	Include
7	4	GUG	To connect the MDU	Action	J Smith	Include	Include	Include
8	5	GUG	To connect the Catheter	Action	J Smith	Include	Include	Include
9	6	GUG	To connect the TSC	Action	J Smith	Include	Include	Include
10	7	GUG	To turn on the System	Action	J Smith	Include	Include	Include
11	791		Caution: Power up sequence	Alert	J Smith	Include	Include	Include
12	826	GUG	Warning: Single Use	Alert	J Smith	Include		Include
13	8		01C. Starting a Case	Subject	J Smith	Include		Include
14	9		To log in	Action	B Jones	Include		Include
15	10		To enter patient data	Action	B Jones	Include		Include
16	11		01D. Run Descriptions	Subject	J Smith	Include		Include

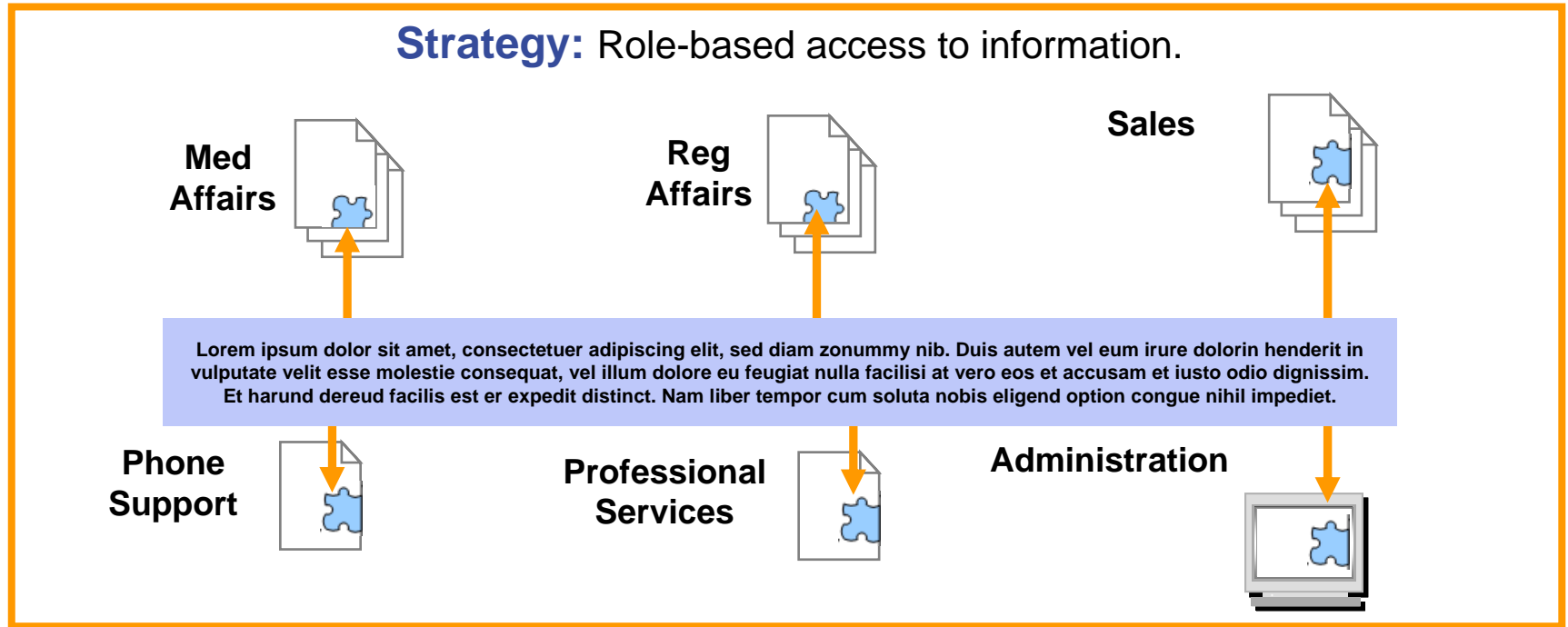
Define Content Strategy

Strategy:

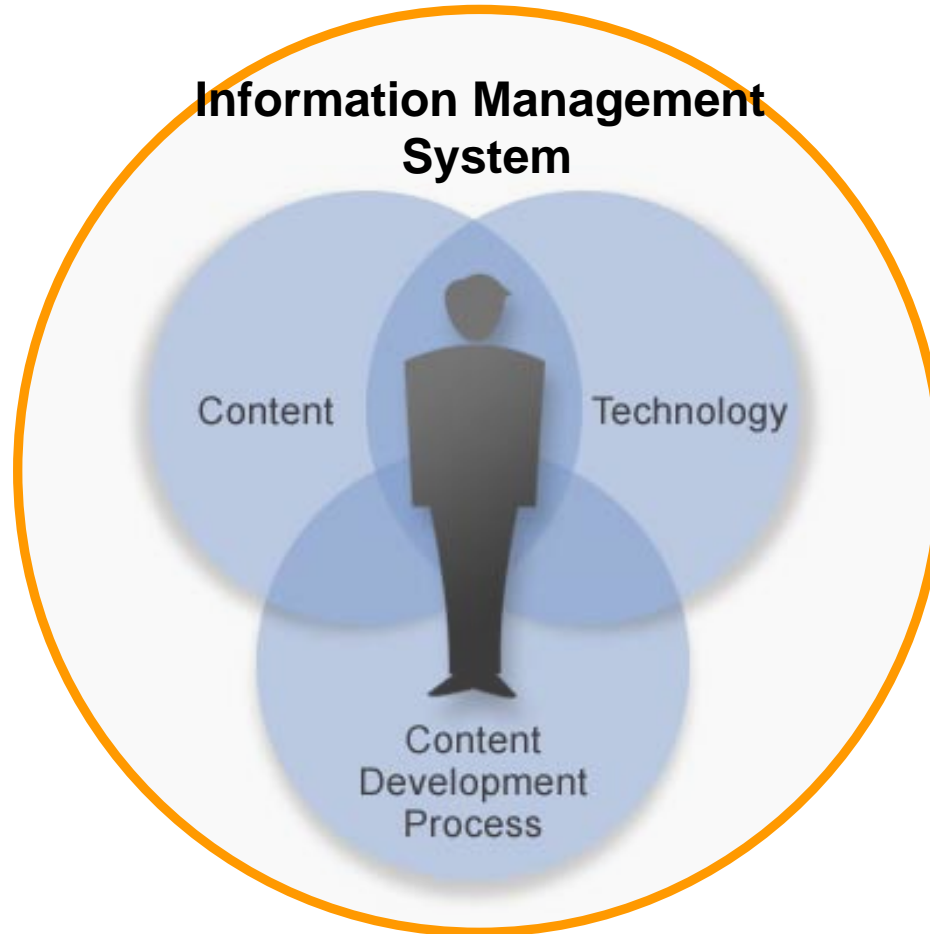
Address each audience separately



Strategy: Role-based access to information.



Identify the Technology that Meets User Needs



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