PERSONA

What: Create personas to personify the needs of the target group(s) of your planned project. It can also be used at an organisational level, to explore ambitions, motivations, constraints etc.

Why: It can be tempting to think that you know all you need to know about your target group, especially if you have worked with the given topic/area for some time. But do you really know what motivates them? What their desires and main concerns are? The persona tool can help you test your assumptions and answer some of these questions.
Personas are not stereotypes, but rather a holistic fictional, yet representative, archetype of a given stakeholder group based on research and experience. When you put a 'face' on your data, you make your insights visible and memorable. This helps the project design team to get a deeper understanding of the target group(s), so the solution proposed can be as impactful as possible.

When: Personas are particularly useful to create in the early stages of the project cycle when exploring needs and designing how to address them. But they can also be used (again) later in the cycle if additions or adaptations to the project are needed.

Step 1

PREPARE THE EXERCISE

Face-to-face: Print out the persona template in A3 (if possible). You will need one printout per stakeholder group that you want to make a persona for.

Online: Prepare a bunch of sticky notes. Copy one Miro template per stakeholder group that you want to make a persona for. Before the workshop, encourage participants to familiarise themselves with the chosen online platform. If you use Miro, you can share this short video tutorial youtube.com/watch?v=kRdtn8G4tII (3. min) in advance.

Facilitator tips
When identifying exercise participants, consider putting together a group who knows the target group(s) well and from different perspectives. This will give you a more nuanced persona. Remember, however, that a persona is an internal tool and this exercise should not include target group(s) members.

Step 2

DETERMINE YOUR TARGET GROUP

Introduce the participants to the timeframe and the purpose of the exercise:

- What are we going to do today?

INFORMATION

PHASE
DESIGN

TIMEFRAME
60-120 MINS.

MODE
BOTH

PARTICIPANTS
3-6

FACILITATION LEVEL
MEDIUM

MATERIALS
TEMPLATE PRINTOUTS ON A3 PAPER, STICKY NOTES, PENS MARKERS, AND A TIMER.

- Why are they invited?
- What are their roles (if participants do not know each other well)?
- What is the timeframe?

Move on to agree among the participants which stakeholder group(s) you need to understand better for the specific challenge you are focusing on. Often, it will be necessary to make personas for more than one stakeholder group.

Use these guiding questions can support the discussion:

- Who are the target group(s) of the project? For example, who will use the proposed service? Do the users of the service share same characteristics or different ones – are some women, other men; some from marginalised parts of the community, other from advantageous parts; some have disabilities; some work, others do not; some are children, other are adolescents, etc.?
- Who are the implementers of the project? What are their characteristics?
- Who are enablers of the project? For example, are there stakeholders crucial to ensuring access or ability to use the proposed service? Is permission needed from someone? Are there gatekeepers who can accelerate project impact?

This list of questions is not exhaustive. Make up more if more guidance for the project is needed.

Remember, personas are not created just for the communities we serve and work with but can also be used to understand other key stakeholders important to the project. If you are looking to get a better understanding of new or existing partner organisations and how to interact with them, use the organisation persona template in the side bar instead.

Allow approximately 15 minutes for this step.

Facilitator tips
If the participants have worked with the chosen target group(s) for long, they may think that they know all there is to be known. Therefore, when conducting this exercise, challenge participants' prior knowledge by asking how they know X, Y, Z and probe for blind spots and bias encouraging the use of data.

Step 3

PERSONA CORE DATA

- Fill out one persona at a time, if you are doing more than one stakeholder group.
- Start by deciding on a fictive person who can represent an archetype of your stakeholder group (i.e., the stakeholder group persona). It is important for this exercise that the template is filled out at the fictive personal level.
- Find a picture representing the chosen persona or make a drawing if more convenient. This might seem silly but putting a face on the persona helps you personify and emphasise with the target group.
- Note down key characteristics of the persona following the template. Remember that the persona is an archetype representing a group, not a stereotype.
  If in a larger group, it can be beneficial to divide the personas between the participants and have them work on a persona in pairs/groups of three. The persona contents can then be adjusted and validated by the entire group later in the exercise. If splitting into smaller groups, make sure to have enough persona template copies (one persona template for each stakeholder group per group).

Face-to-face: Start adding the persona data to sticky notes and wait with filling out the actual persona template until the end when all participants have agreed on the content.

Online: Start adding the persona data to digital sticky notes and wait with filling out the actual persona template until the end when all participants have agreed on the content. If splitting into pairs, use break-out rooms.

Allow 15–30 minutes for this step, depending on the number of personas you wish to create.

Facilitator tips
Remind everyone to be aware of their bias and that personas should built on data available and solid experience. If working together in pairs/small groups, one participant can play the 'devil's advocate' to challenge the characteristics of the persona and probe for how representative they are.

Step 4

FILL IN THE PERSONA TEMPLATE

The participants/groups fill in the persona template from 1–6. Fill out the persona characteristics on sticky notes and write directly onto the actual persona template in the end, when all participants have agreed on the content. These guiding questions can help along the way:

- What data do we need to truly understand the persona? Do we have this data? Do we need to reach out to others to learn more?
- What do we know about the given persona's relation to the challenge we are addressing?
  - How are they affected by the challenge? What are their current pains in relation to the challenge?
  - What are their hopes and dreams regarding the challenge (gains)?
  - What are they trying to do and why is it important to them when facing the challenge (jobs-to-be-done)?
  - What are they doing to address or live with the given challenge (reality)?
  - Based on experience and/or data, what observations can describe their experience and motivations (stories, motivations)?
  - What in the context is critical to consider in relation to the challenge to be addressed (context)?
  - What would their expectations be of your intervention?

For an example of how to fill out the template, see the – pre-filled example under "Templates" to your right-hand side.

Allow 30–45 minutes for this step.

Facilitator tips
When looking at the data needed, participants can refer to recent needs assessments, evaluations, field visits, information from target group representatives, other colleagues, external partners, etc. In addition to looking into written data, it can be useful to just pick up the phone and reach out to the above for some quick insights. It is not the intention that the participants should spend much time reading reports, etc. Therefore, it is important to emphasise that this is a quick exercise, and that the persona may not be perfect from the first go, but more details or adjustments can be made later.

Remind everyone to apply a protection, gender, and inclusion lens as well as a conflict sensitivity lens when filing out the persona.

Step 5

PRESENT, DISCUSS, AND ADJUST

- Assign one of the participants to lead the consolidation of inputs to update and finalise the persona canvas as you progress through each of the persona characteristics. This way, the persona canvas is updated instantly, and you have a final product by the end of the exercise for each chosen stakeholder group. When all needed stakeholder groups have a complete and consolidated persona, and if you had split into smaller groups, come back with the entire group to discuss and agree on input.
- Now present the personas to each other and discuss if anything needs to be adjusted, or if more data is needed to validate the information. If no more data is needed, validate the personas as a group. Do this for one persona at a time.

When all needed personas are done, tell the participants to be mindful of updating them if new insights are gained, for example, trough new interactions with the stakeholder groups. The personas are of best use for project design and implementation if they are dynamic documents.

Allow 15–30 minutes for this step.

Next step: Ask the participants which insights the exercise has brought to light. Share your own insights and how their efforts will be used. Remember to thank everyone for their time and inputs.

Facilitator tips

Be conscious of potential ‘herd mentality bias’ and challenge how the individual participants feel the different characteristics are known. Consider assigning one participant as ‘the bias detector’. The more accurate the personas are, the more useful the tool will be for project design.