

Chapter Spotlight

PDMA Carolinas chapter—Personas and Scenarios Workshop launches PDMA Chapter in South Carolina



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Product developers talk about the voice of the customer (VOC) yet too often products and services seem to fall short of filling those key needs or miss how the customers actually behave when using them. The “personas” and “scenarios” tools addressed by a Carolinas chapter workshop provide an alternative to dry descriptions of target customers and complement and enhance the use of VOC best practices. The tools make users visible and tangible participants in a development process. It has to be easier to remember users after giving them names, pictures, attitudes, and behaviors! —Tricia Sutton

What do Michelin, IBM, Microsoft, and Rubbermaid have in common? In addition to innovation and new product development excellence, they all use “personas” and “scenarios,” which are design tools for representing users and focusing on what is important to those users.

What do Milliken, Techtronic Industries North America (TTI), and Michelin North America have in common? They are all headquartered in the Palmetto State and attended the PDMA Carolinas chapter’s first event in South Carolina on April 3, 2008, a two-and-half hour evening workshop dedicated to learning how to use personas and scenarios and to bringing PDMA (Product Development and Management Association) to the region.

It was not your typical event. The workshop was about empowering attendees and learning by doing, learning from peers, and learning while having fun. The objective was to give attendees some intuition and motivation to explore personas and scenarios further, and possibly employ them at work. Michelin North America sponsored and hosted the event at its flagship store in downtown Greenville, creating a memorable experience for all 35 attendees. Dedicated to the improvement of sustainable mobility,

the Michelin Group designs, manufactures, and sells tires for every type of vehicle in 170 countries and publishes travel guides, hotel and restaurant guides, maps, and road atlases.

The workshop began with networking and a brief address by chapter and sponsor officials. Then Bryan Haltom, Vice President of Marketing, PDMA Carolinas chapter, and Value Stream Manager, Lord Corporation; and Claire-Juliette Beale, President, PDMA Carolinas Chapter, and Cofounder, Touch360, presented an overview on using the personas and scenarios tools and introduced the exercise—a competition to identify innovative new service ideas.

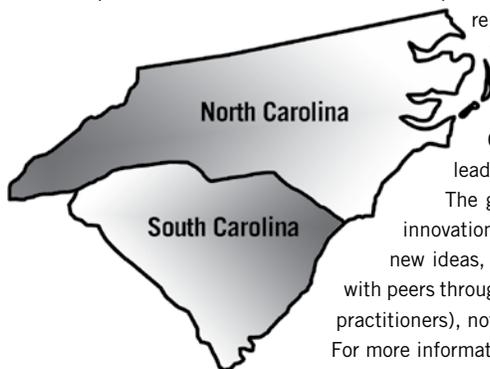
About personas and scenarios

One of the key challenges to successful innovation and new product development is making key users the focus of the design and keeping them in mind throughout the process. Personas and scenarios are tools used by design professionals to focus on the issues of greatest importance to users and create better user experiences.

Simply put, personas are archetypal users that represent real

PDMA Carolinas Chapter—Finding New Ways to Serve a Larger Region

The PDMA Carolinas chapter is a community for North and South Carolina professionals and organizations that have a stake in the broad areas of product and service innovation, development, and management—from the Front End of Innovation to manufacturing. The chapter



reinvigorated in 2004 around a core group in Raleigh/Durham, North Carolina. Since then, PDMA Carolinas is finding innovative ways to better serve its members in key metropolitan areas across the two states, such as adding local volunteer committees to serve the Charlotte and Winston Salem/Greensboro regions in North Carolina and the Greenville in South Carolina. The chapter seeks involvement of additional committee leaders and sponsors to help support the growth in programming.

The goal of the PDMA Carolinas chapter is to help businesses increase and realize their innovation potential. The chapter brings its community value by providing opportunities to learn new ideas, approaches, and best practices from world-class organizations as well as to network with peers through events and meetings throughout the year where the users (new product development practitioners), not just keynote speakers and gurus, take center stage.

For more information on the chapter and photos of the event, visit www.pdma.org/carolinas.

users. Ideally, they are developed from the organization's marketing research data and they represent typical users within targeted segments (data-driven personas). They can also be developed from knowledge and assumptions held by stakeholders (assumption personas). Where the user is typically described with dry statistics, basic sociodemographics, and long descriptions, personas have a name, face, and story that bring to life their social and cultural context. Although personas are intended to give a memorable, tangible sense of the user group, they are developed from and supported by hard data. To ensure that the personas reflect "real" users, they need to be based on a described understanding of the users, taking into account their goals, roles, and priorities—the more specific and detailed the personas, the more valuable.

The process that leads to the birth of the persona generates deeper insights into users—and customers—through qualitative and visual descriptions of user personalities. Personas are excellent tools for communicating brand values or product goals to internal and external stakeholders, helping with key decisions throughout the project life cycle, and gaining insights about various types of users.

Scenarios are narratives that put personas in action mode within specific situations where users may use a product. Scenarios provide further insight to the personas through the description of the users goals, behaviors, needs, and wants, in relation to a particular outcome, task, or situation. Scenarios are often used to gain—and communicate—insight into the various ways customers use the products and identify opportunities to improve products or even introduce new features. Although effective on their own, scenarios can be used in conjunction with other visual tools, such as mapping and storyboarding to assist in internalizing the characteristics of target users, buyers, influencers, and so on.

For further exploration of the tools, refer to "The Persona Lifecycle: Keeping People in Mind Throughout Product Design," a book by John Pruitt and Tamara Adlin.¹

User experience—practicing what we preach

Following the presentation of key principles, Haltom and Beale described a challenge to build a persona and a scenario, then identify innovative new service ideas for Bezon Wireless, a fictional telecom company. To help achieve the challenge, attendees received information on nine basic personas, based on the book "Karma Queens, Geek Gods, and Innerpreneurs," written by Rentel and Zellnik.² Equipped with handouts, flip charts, and markers spread over the store's two levels, teams of four to five individuals collaborated to meet the challenge.

Building assumption-based personas with strangers can be a challenge. Teams brought together creative and analytic brains, designers and engineers, marketers and product managers. The team members were individuals like Becky Gordon (Product Manager, NuVox), Lisa Clark (Market Manager, Milliken) who discovered the tools, and Lisa Perpall (Emerging Business Development, Michelin) who "had heard about them but had never had a chance to practice," as well as professionals who use them already. "It was fun and the team worked together well to learn from each other and develop the concept," Perpall said. Her team included her colleague Bart Thompson and two members from TTI, including Thomas Parel, an industrial designer who "was particularly great at illustrating and presenting our ideas."

Order emerged quickly and all teams were ready in time to

present their concepts to their peers and a jury composed of representatives from VantagePoint, Michelin, and PDMA Carolinas board. Members of the three winning teams received prizes. Not surprisingly, the Perpall/Parel team that combined business analysis and industrial design skills came up with one of the winning concepts: a cell phone targeted at busy suburban mothers that would enable her to easily communicate with her family (and the au pair) to coordinate all her many appointments and events.

Personas and scenarios are powerful tools to help designers innovate and to keep users in mind throughout the development process. For the Carolinas chapter, which serves a community spread over two states, bringing users into the heart of the development process and designing the user experience for individuals and corporate members are both the objective and the means. §

Endnotes

1. John Pruitt and Tamara Adlin, *The Persona Lifecycle: Keeping People in Mind Throughout Product Design* (Morgan Kaufman Publishers, 2006).
2. Ron Rentel and Joe Zellnik, *Karma Queens, Geek Gods, and Innerpreneurs* (McGraw-Hill, 2007).
3. John Pruitt and Tamara Adlin, *The Persona Lifecycle: Keeping People in Mind Throughout Product Design* (Morgan Kaufman Publishers, 2006).
4. Ron Rentel and Joe Zellnik, *Karma Queens, Geek Gods, and Innerpreneurs* (McGraw-Hill, 2007).



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Sometimes the simplest design provides the ideal mix of form and function. From top-selling housewares for Cuisinart, to life-changing medical devices for CR Bard and ubiquitous food storage containers for SC Johnson, Big Bang develops products that are exciting and executable. The application of innovation.