

Information sheet: How to Create Your Own Persona

Before you begin: Review the “What is a Persona?” information sheet.

The personas we’ve created are based on our research with library staff and patrons, but you may want to customize personas to better fit the experiences your staff will encounter when working with patrons. To help you with this process, we’ve included recommendations for how to develop your own personas.

Anthony: First-Time Online Shopper

Goals:

- Purchase a pre-owned car within budget online.

Personality Traits:

Frequency of Internet Use: ★★★★★ (High)

Online Risk Awareness: ★★☆☆☆ (Low)

Digital Literacy: ★★☆☆☆ (Low)

Frictions:

- Anthony recently transferred from an out-of-town community college. He needs a car to get around, but he couldn't find a car within his budget on the nearby car dealers.
- He resorts to online shopping but didn't know what to expect since he's never done it.

Scenarios in the Library:

- **Time 1:** Anthony was not sure where and how to buy a car online, so he posted to a Facebook group asking for help. Several people provided links to external sites.
- **Scenario Situation:** How can Anthony tell if a seller is trustworthy? How to spot a scam?
- **Time 2:** Anthony just spotted a car within his budget on Facebook Marketplace. But the seller asked Anthony to pay a monthly deposit before the car delivery.
- **Learning Librarian Role:** What should Anthony do?

Motivations:

- Online shopping

Technology Use:

- Smartphone
- Social Media
- Library Computer

Age: 20
Work: Student
Family: Single
Thoughts:
"My friend advised me about buying online because her money was stolen from her account the first time."
"I need to be very careful, but how can I tell if there's a scam or not?"

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Above: An example of a persona.

There are three main parts to the process of developing personas:

1. Information gathering and analysis to identify common staff-patron interactions related to using personal information;
2. Developing persona descriptions that reflect the various challenges that might arise during these interactions; and,
3. Scripting and creating scenarios to analyze the challenges and identify potential solutions or policies related to the scenarios.

Information Gathering and Analysis

To ensure that you are not making assumptions about your patrons, you should collect as much information about your patrons as possible.

There are many ways you can choose to collect data about your patrons; we’ve listed some options below. When figuring out the best method, ensure that you are not infringing upon the privacy of your patrons.

1. For one month, have all library staff document privacy concerns raised by patrons in the Data Collection worksheet. These notes should include basic information about the patron such as approximate age, traits, and digital literacy experience to help inform the creation of your personas. For example, you might note that a patron who was struggling to create an email address was an older adult and an immigrant whose native language is not English. At the same time, be careful that the details provided do not make it easy for other staff to identify that patron.
2. When possible, have staff talk to patrons that have information needs that involve sharing private information or when patrons appear unaware about the risks of sharing certain types of information. Staff may have limited time to talk with the patron, but try to ask the following:
 - Is the patron aware of privacy concerns associated with their request/question?
 - If so, what are their privacy concerns? Why did they choose not to address them with the library staff?

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- If not, let them know the privacy issues. In light of this new knowledge, would they address their concerns differently with library staff?

The main goal of these questions is to better understand what knowledge the patron does (and doesn't) have and additional details that help contextualize their request.

3. If your library offers programming on digital literacy or technology use, document the questions and challenges participants had that were related to privacy.
4. If you are unable to engage in a more rigorous data collection, ask staff to recall previous patron interactions that involved sensitive data or raised privacy concerns. What were the concerns of the patron? What do they remember about the patron that could be a contributing factor in why the patron had their specific concern? Instruct staff to reflect on these experiences and to write some notes about these interactions to share at the next session.

Developing the Persona Descriptions

Based on the information you gather you can begin mapping your branches' patron types with privacy challenges and risks. Get feedback from other staff members and discuss which patron types truly reflect data privacy issues commonly seen in your community. Aim for consensus across staff regarding a set number of patron types that will be transformed into personas.

The purpose of developing and working with personas is to be able to develop solutions, programs, and services based upon the real needs and goals of patrons in your community. Describe your personas to express enough understanding and empathy to understand your patrons. We've created a template you can use to do this, and we recommend including the following:

- Give each persona a name.
- Find an image to represent your persona. It can be an avatar or a photograph. (NOTE: You can find copyright-free images and avatars at [Pixabay](#), [Unsplash](#), and [Pexels](#).)
- Include details about the patron's education, lifestyle, interests, values, goals, needs, limitations, desires, attitudes, and/or patterns of behavior to provide helpful context for the scenarios.
- Add personal details to make the persona more realistic, such as their profession, their age, the number of family members they have, etc. This could be fictional if you don't have the information.

Information sheet: How to Create Your Own Persona

- Include 1-2 specific information needs that are connected to this persona. This will be what you use in creating scenarios to accompany your personas.

Scripting and Creating Scenarios

There are many ways to use personas. One method of using personas is to develop scenarios that paint a picture of an interaction between library staff and the persona. These specific situations should help staff ascertain how to address different privacy concerns of library patrons. Scripted scenarios usually involve placing the persona in a specific context with a question or problem they have. See the personas and scenarios we've created for examples of specific situations that emerged from our research. [Build a script around the privacy scenario that describes a potential interaction between a staff member and a patron.]

Scripted scenarios should be relatively short and concise and should be written to closely reflect actual conversations between library staff and patrons. They should clearly identify the privacy-related challenge or risk and detail how a staff member might respond. Your goal with the script could be to model a staff response that aligns with current library policy, or to have the response fall short or include mistakes that could be discussed by staff after reading the scenario. You may want to include questions to guide a discussion amongst staff regarding the actions of the staff member and whether other approaches would have worked better.

Once prototype personas and scenarios have been developed, check with library staff who were not involved in the initial process of developing the personas, and ask them for feedback. This can be done informally or formally; the goal is to ensure the personas and scripts reflect the real experiences of staff/patron interactions.

Sources

Dam, R. F. & Siang, T.Y. (2020). Personas – A Simple Introduction. Interaction Design Foundation. Retrieved from: <https://www.interaction-design.org/literature/article/personas-why-and-how-you-should-use-them>

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