STEPS AND TIPS FOR CREATING PERSONAS

Developed by the LMI Institute and the Washington Employment Security Department

What is a Persona?

A persona is a concise, human-centered profile of an audience or user group that is built from people's real behaviors, motivations, and challenges. Personas can be used during the research, design, and communications/marketing phases of a public data project to help teams understand various user needs and to guide development so that services, products, or websites are accessible and inclusive.

A persona gives a team one specific, memorable stand-in built from real data, so that the team can think concretely about a user group and its needs at each decision point.

Benefits

- Personas create a shared understanding of real needs to use across the organization and over time.
- Personas guide us to solve the right problems with clarity, empathy, and consistency.
- Personas help us prioritize decisions based on what really matters to customers.
- A named, human persona sticks in a way that bulleted lists of survey findings don't. It gives everyone on a team, from designers to leadership, a single reference point to argue from instead of everyone privately picturing a different "typical user."



Steps for Creating Personas

1. **Identify the audiences or customers you want to build personas for and be specific enough to be useful.** "Job seekers" may be too broad, while "recent graduates exploring their first job search" or "adults returning to the workforce after a gap" gives you something specific to research.
2. **Define what you need to learn.** Think about which tasks are hardest, which communications platforms people use, or where they get stuck.
3. **Connect with stakeholders who represent your customers and gather accurate and relevant data.** This could be through a user-needs survey or focus groups. For example, the Washington case study below shares how staff surveyed the community and technical college system about how people use labor market information (LMI) data in their work.
4. **Analyze data to look at patterns on customer preferences, behaviors, needs, and pain points.** This could mean coding open-ended survey responses into recurring themes to identify distinct users who rely on LMI data. Group respondents by shared behavior and goals, not just demographics — for example, by career stage or comfort using online tools. Washington segmented by role and point of use within the college system (a Navigator advising a student in the moment needs something different from an IR Analyst pulling data for a grant report) and built its personas around those distinct roles and the stages at which each one turns to the data.
5. **Evaluate and refine personas with your stakeholders, confirming personas accurately represent them.** Bring the draft persona back to the stakeholders and to customers.
6. **Operationalize personas in day-to-day decisions about product improvements, user experience, and marketing.** Washington is using its personas to guide updates to its LMI website and data products and has built in a feedback loop with these same users to check whether each update is closing the gaps the personas identified.
   See the case study and examples below.

Tips for Creating Personas



Align expectations for all parties. Agree upfront on how it will and won't be used — for example, to prioritize feature upgrades, not as a substitute for testing with real users.



Be thoughtful about how and when to narrow down data so valuable information doesn't get lost. Keep it to the 3-5 traits that actually change a design decision.



Have the right people at the table and leverage their different strengths and skills. A persona built by one team in isolation gets ignored by everyone else. Pull in design, program, and frontline staff who talk to these users, so the finished persona reflects more than one team's assumptions.



Gain trust from executive leaders. Without leadership buy-in, personas tend to get shelved after the initial presentation instead of shaping anything.



Build relationships and listen to understand. Treat early conversations as the start of an ongoing relationship you'll keep checking the persona against, and a way to build a stronger relationship with users.



Plan to revisit personas periodically, or after a major shift in strategy or content. A persona that never gets updated will quickly stop matching real customer needs.

Case Study: How Washington Built and Used Personas

Washington's Employment Security Department (ESD) surveyed the state's community and technical college system on how staff use labor market information (LMI), drawing more than 250 responses. ESD and the State Board for Community & Technical Colleges (SBCTC) then convened users in person to explore what data each group needed, when in their work they needed it, how they used it, and where they struggled. The result was a set of role-based personas: navigators, faculty, grants specialists, program strategists, and institutional research analysts. These personas now guide updates to ESD's LMI website and data products, and a feedback loop with the same users confirms the changes work. By asking "*Does this work for Marisol?*", ESD built products that better serve its users.

