Eaton University Enhanced Learner Personas

2/23/2012

What are Personas?

- Fictional representations of real-world users that serve as a model to guide interface design

- The *person* depicted in the persona is fictional, the description is very real and supported by user research.

- This set of personas was developed as the result of many hours of preparatory work on the part of the Eaton University team, a profiling workshop and 30 phone interviews with Eaton employees.

Why create personas?

- "Personas tap into a fundamental human skill—the ability to make predictions about how other people will react based on mental models of them." Dr. Charles B. Krietzberg*

- "You are not your user" is an oft repeated mantra in user centered design, but it's harder to achieve than it would seem—personas can help

- Personas are memorable and easy to share; the team can develop a communication shorthand

* http://msdn.microsoft.com/en-us/magazine/dd569755.aspx

Enhanced Learner Personas

- Producers
  - Learning Professional
  - Course Owner
- Consumers
  - Non-elective user
  - Guided user
  - Self-directed user
  - Power user

Kristine Lawrence

Learning Professionals at Eaton fall into two categories:

Primary: Professionals whose primary job responsibilities are tied to learning (e.g., HR, training, organizational development)

Ancillary: Professionals with job responsibilities that have a significant learning component (e.g., operational & functional excellence leaders, standards & compliance professionals)

"When I need help I'abuse the personal network' but there are probably more official channels I should be using."

Learning Professional
Content Producers

Understanding Kristine

- Kristine is mid-career; she has established a high degree of competency and is confident in her abilities. She has a well developed professional network and is savvy about leveraging it.

- She is accustomed to thinking about learning from the perspective of the subject or topical areas she is responsible for. She is not as accustomed to thinking about her work from the perspective of the people who consume content; this creates some tension for her when it comes to trying to assess learning needs.

- Kristine is more focused on tackling the myriad items on her to-do list and working to achieve ambitious goals in a resource constrained environment than in giving a lot of consideration to "customer satisfaction."

- Success metrics and measurement are perpetually on her "should do" list, but often fall by the wayside as she addresses the more urgent day to day demands that chew up her time.

How we can help Kristine

- Although Kristine has a basic understanding of what Eaton University has to offer, she would benefit from more structured communications from Eaton University, reminding her about offerings she may not have at front of mind.

- Kristine will benefit most from assistance with audience definition and needs assessment; this is a significant pain point where Eaton University could have a big impact.

- We could help Kristine by personalizing and publicizing the recommended process for reaching out to Eaton University, particularly around trouble-shooting and problem-solving, and by making the process as transparent as possible.

- Improving ease of use for end-users is an indirect way to help Kristine that will nevertheless have significant impact.

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Nathan Lee

Course owners are learning professionals with a unique set of needs and challenges.

Course owners often manage several relationships simultaneously, including:

- Relationships with third party vendors (including tools/technologies and content creators)

- Relationships with instructional designers (both within Eaton and externally)

- Relationships with instructors/facilitators of courses

"I hate to say it, but it's easier for us when we use third party vendors. The only reason we don't do it more is that we want to be good corporate citizens."
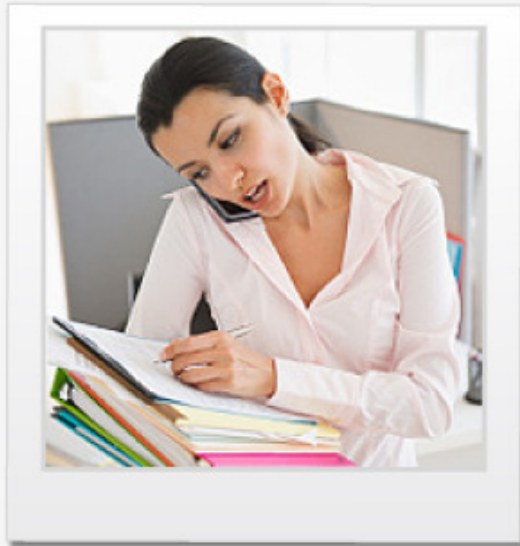
Course Owner
Content Producers

Understanding Nathan

- Nathan's job demands that he keep several plates spinning at all times as he juggles the moving parts that make up course ownership, maintenance and delivery.

- Nathan has a good working understanding of the LMS, including both strengths and weaknesses. Generally his feeling is that his life would be easier if the LMS had fewer quirks and constraints, but he and his team have created solid work-arounds and troubleshooting guides for students- if only they could get students to refer to them.

- He tends to think about audiences in terms of job title and salary band, which is typically the information he uses to determine who courses will be offered to, particularly required courses. Nathan is pretty sure that he is casting a wider net than would be ideal, but doesn't know how to target learners more narrowly.

- A significant amount of Nathan's energy is devoted to tracking course completion, particularly when there is a standards/compliance component. This bogs him down and distracts him from being able to focus more strategically, but this tends to be a critical metric in his own performance evaluation.

How we can help Nathan

- Nathan will benefit the most from having Eaton University help him minimize the time he has to devote to logistics and troubleshooting so that he doesn't lose sight of the big picture.

- Nathan is open to the idea of more regular touch points with Eaton University professionals that will help him improve his skills and suspects there is a lot he could learn from other course owners and learning professionals but he needs more structure to facilitate that.

- Nathan is looking for enriched communication options in the LMS that will allow him to communicate more easily and frequently with students who haven't completed required courses. To manage this today, he has set up a parallel email system outside the LMS that creates extra work but is the only way to get the level of participation he needs.

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Non-Elective User
Content Consumers

Understanding Vicky

- There are not enough hours in the day for Vicky to do her job, keep her boss happy and meet her performance goals.

- Vicky is in a sales and marketing role and has to stay up to date on a huge amount of detailed information about products and services, much of which changes on a regular basis.

- Vicky has to take several mandatory courses related to legal and regulatory topics each year. She finds some of the content valuable but it's often irrelevant to her role.

- She is resentful of the technical frustrations that accompany required courses, from classes that don't show up unless searched for with exactly the right keywords to not receiving credit for a course unless the system is exited in exactly the right way.

- If pressed, Vicky wishes she had time to focus on professional development, but she's really too busy to worry about it much.

How we can help Vicky

- We need to make the experience less painful for Vicky by making it faster and easier to interact successfully with the LMS. Vicky's perceptions of Eaton University are largely (and negatively) colored by her frustrations with an interface that is making her life harder than it needs to be.

- We also need to broaden Vicky's perception of what Eaton University is and what it has to offer. She is a captive audience in that she has to show up to take required courses—we need to capitalize on her presence and find ways to expose her to relevant content and services that she's not aware of.

Vicky Hood

Non-elective users are people whose interaction with Eaton University is defined by (and often limited to) taking mandatory courses. A sizeable number of employees—regardless of role, function or time with the organization-only interact with Eaton University in the context of completing mandated/required courses.

We suspect that non-elective users make up the largest consumer user group.

"Sometimes I feel like I spend more time on classes related to litigation topics than doing my job."

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Harrison Lathi

Guided users are those participating in a structured program of professional development where courses are prescribed for them. This includes new employees completing orientation courses.

"I've never had a job with such comprehensive training before."

Guided User
Content Consumers

Understanding Harrison

- Harrison is a recent college graduate participating in a year-long development program in Eaton's Finance function. He doesn't have a highly developed personal network and is still figuring out how to navigate a complex corporate environment. Harrison is eager to excel in his program; he wants to impress his boss and establish himself in his career.

- Harrison knows what courses he needs to take and has a clear understanding of how the courses are relevant for his role.

- He experiences a lot of the same frustrations with the LMS as non-elective users, but they are perceived a bit less negatively because he is not as time-starved and feels the benefits of what he is learning outweigh the negatives of frustrations with the interface.

- He wants to make sure that his Eaton University transcript makes him look good—he's had a couple nasty surprises where he "failed" quizzes by going back to review content which was allowed in other courses.

How we can help Harrison

- We need to help Harrison make a smooth transition when his program is complete so that he continues to benefit in his career development from the resources Eaton University has to offer.

- eLearning course construction should focus on maximizing learning and students shouldn't encounter any surprises around success measurements. Guided users report being more engaged when courses included quizzes and interactivity.

- The end of orientation and development curriculums can serve as an excellent touch-point trigger for informing employees about Eaton University resources and services.

- We need to look for opportunities to make relevant connections between content, identifying ways to bubble up content he might be interested in.

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Paula Hickman

This is a small but important group of users, as they are the most ripe to become more deeply engaged with Eaton University.

Self-directed/exploratory users bring an attitude of continuous learning to their work and they are receptive to learning opportunities. They often read and/or pursue professional development activities on their own, although they may not be familiar with the Eaton University library or have made heavy use of Eaton University courses.

"These days more than ever my job requires perpetual learning."

Self Directed User
Content Consumers

Understanding Paula

- Paula is a plant manager with a busy, dynamic role. She has three direct reports and encourages them to focus on continuous improvement in their professional development and day to day activities.

- Paula pays for a subscription to the Economist out of pocket and regularly reads vendor literature and government regulatory information but is only vaguely aware of Eaton University Library.

- Paula struggles with the LMS when it comes to identifying courses offered locally, as travel is limited. She doesn't understand why she has to manually register for wait listing in courses class by class and finds that only having 24 hours notice for wait-listed courses means she can never take them.

How we can help Paula

- Paula isn't always fully informed about what Eaton University has to offer, so we need to look for opportunities to enrich her understanding, potentially by taking advantage of the APEX process (which Paula takes very seriously) as a touch-point.

- We can't afford to dampen Paula's enthusiasm by making it hard for her to browse the catalog and filter courses to identify location, availability, etc.

- We can help Paula by enriching browsing and filtering in the LMS so that she can:
  -find courses associated with functions/job role (for herself and her team)
  -have mapping between competencies as defined in APEX and associated courses that will help skill build in those areas
  -filter results for things like seeing courses offered in a local/nearby city and courses by calendar date
  -compare/contrast courses at a glance rather than having to click into individual classes one by one for information
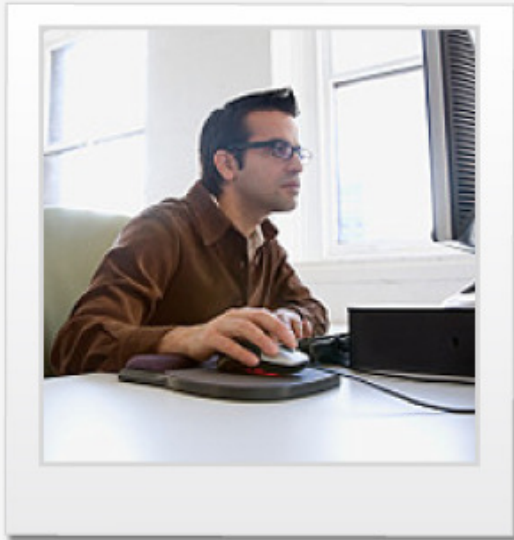
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Louis Herrera

Although small in numbers, in many ways these are the "ideal" Eaton University users. Power Users are comfortable interacting with a variety of Eaton University platforms, generally experience success, are undaunted by challenges, and resourceful about seeking out assistance when they run into problems. A number of engineers (and most content producers) fit this profile.

"Eaton University is a place I go to find training, a place to get tools, a place that helps steer my career. It helps me use the saw and sharpen the saw."

Power User
Content Consumers

Understanding Louis

- Louis is a skilled professional at the peak of his career. He is an electrical engineer who has held roles in a number of different parts of the company and now works in the Innovation Center where he thinks non-stop about coming up with the next Big Thing for Eaton.

- Louis belongs to several professional organizations and regularly attends conferences and reads journals.

- He looks at Eaton University as part of a broader arsenal of resources at his disposal and he moves easily between "external" and "internal" resources. "My area of expertise is very specialized, I don't expect any one source to meet all my needs."

- He makes heavy use of the Eaton University, setting up alerts on topics that interest him, but he also refers to a variety of websites. He is intrigued by the idea of social networking and would like to see the kinds of "people who looked at this item also looked at these items" that he encounters on Amazon at work in Eaton University

How we can help Louis

- Louis feels the Eaton University library is a bit harder to use than it should be; we can help him by reducing the re-learning curve when he has been away for a while and by making alerts more robust so that content he is interested in will be pushed to him via email.

- Louis makes heavy use of SharePoint project and team sites and would like to have relevant links to library and other Eaton University resources embedded so that people don't have to leave the environment they're working in.

- He notes that while he will go the extra mile, a lot of his colleagues do not.

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Appendix

Learn more about Personas:

- Online sources:
  - "The Power of Personas"

    http://msdn.microsoft.com/en-us/magazine/dd569755.aspx
  - Personas from A-Z

    http://www.deyalexander.com.au/resources/uxd/personas.html
- Book:
  - The Persona Lifecycle by John Pruitt & Tamara Adlin

    http://www.amazon.com/Persona-Lifecycle-Throughout-Interactive-Technologies/dp/0125662513/ref=sr_1_1?ie=UTF8&qid=1330020856&sr=8-1