

Whitney Quesenberg “Whitney the Storyteller”

Roles: Designer, mentor, user analyst

Goals: User centered design for every product, Web site and application

Objectives: Get everyone to listen to the stories that people tell, and use them in their designs

“The computer screen is just a very small stage”



Whitney Quesenberg is a user interface designer, design process consultant, and usability specialist with a passion for clear communication. As the principal consultant for Whitney Interactive Design (wqusability.com) she works with large and small companies to develop usable Web sites and applications. She enjoys learning how people around the world work with technology and hearing their stories.

The techniques of usability are one of her interests, and she has worked on standards and methodologies more than she cares to admit. As a result, she’s spent many weekends working on articles and presentations and arguing the fine points on industry forums. She’s proud that one of her articles won an award as an STC Outstanding Journal Article, and that her chapter “Dimensions of Usability” in *Content and Complexity* turns up on so many course reading lists.

An active volunteer, Whitney is President of the Usability Professionals’ Association (UPA), on the Executive Council for UXnet, and manages a popular usability Web site at <http://www.stcsig.org/usability>. As director of the UPA Voting and Usability Project and a member of the Advisory Committee for the Elections Assistance Commission, she works to ensure the usability of voting systems.

Before she was seduced by a little beige computer into software, usability, and interface design, Whitney was a theatrical lighting designer on and off Broadway, learning about storytelling from some of the masters. The lessons from the theatre stay with her in creating user experiences. She can be reached at whitneyq@wqusability.com.

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STORYTELLING AND NARRATIVE

Whitney Quesenbery, Whitney Interactive Design

PERSONAS WORK BECAUSE THEY TELL STORIES

A human being is nothing but a story with a skin around it.

—Fred Allen

Storytelling does not just mean the once-upon-a-time of fairy tales or the suspended disbelief of scary ghost stories. Stories are a way of explaining the real people personas are based on. In fact, it is storytelling that makes personas work, by distilling information and analysis into a character and a narrative that ignite the imagination and bring the personas to life. Personas and their stories represent a shorthand by which we can convey the world of user research discovery to everyone on the team.

If personas are the nouns, stories add the verbs, showing the personas in action over time with goals and behavior—a beginning, middle, and end. Storytelling is used throughout the persona life cycle, adding depth to the characters and connecting them to the context of the project. Every time we create a scenario or a short anecdote to imagine how our persona might interact with our product, we are creating a story that shows the persona in action and that helps us to understand that persona and how to better design for him or her.

An Experiment

DOES YOUR BRAIN MAKE UP STORIES?

Most people (even many who work on the brain) assume that what you see is pretty much what your eye sees and reports to your brain. Actually, your brain adds very substantially to the report it gets from your eye, so that a lot of what you see is actually “made up” by the brain. There is a blind spot (actually two, one for each eye), a place pretty much in the middle of what you can see where you can’t see.

Instead of a big hole in the middle of our vision, the brain fills in the gap. “What you see is something the brain is making up, since the eye isn’t actually telling the brain anything at all about that particular part of the picture.”

If you want to see this for yourself, there is a simple experiment described on the Serendip Web site. <http://serendip.brynmawr.edu/bb/blindspot1.html>

Paul Grobstein, Serendip

Let’s start by looking at why storytelling is such a powerful tool in our human culture, including business. We will then examine the elements that make up a story, and end with some ways of creating good stories around personas.

WE ARE WIRED FOR STORYTELLING

All human beings have an innate need to hear and tell stories and to have a story to live by.

—Harvey Cox

Stories are a very old form of communication—so old that we are wired to be receptive to learning from stories. Movies, books, TV, and even the gossip around the water cooler are all part of this basic aspect of being human. As Walt Disney imagineer Bran Ferren puts it, “Most people function in a storytelling mode. It is the way we communicate ideas richly, as well as how we structure our thoughts.”

Bryn Mawr College neurobiology professor Paul Grobstein describes the brain as a “semi-autonomous, evolving, creative agent” and paints a picture of the nervous system and brain as “an exploratory device, one that is continually building and revising models of the world by generating outputs and observing the resulting inputs” [Grobstein 2002].

The concept of being hardwired for storytelling is found in the work of many people, from business storytelling expert Steve Denning to novelist Jonathan Franzen. In an article about using stories for teaching, The Turner Learning Web site says that “neuroscience is discovering that the brain is wired to organize, retain and access information *through story*.” They go on to suggest that this means that stories are an effective way of teaching—that they allow students to better “remember what is taught, access that information, and apply it more readily.” When we use personas and create stories for them, we tap into this deep core of human cognitive process.

SHARED STORIES CREATE CULTURE

Everyone is necessarily the hero of his own life story.

—John Barth

Every culture has its stories, whether you call them folktales, myths, urban legends, or even history. One way of looking at a culture is as a group of people who share a set of stories. Some stories have survived intact for thousands of years. Epics such as *Beowulf*, *The Labors of Hercules*, *The Mahabharata*, *The Odyssey* and others are still a rich part of our culture. Other stories have been told and retold, recast to echo each culture in which they appear (see Figure 9.1). Although the details may change, the outline and strong metaphors of the story are easily recognizable. There are folktales from Europe and the Middle East, such as Briar Rose (or Sleeping Beauty), Hansel and Gretel, or Baba Yaga, which appear in hundreds of variations.

People who study stories and culture believe that there are commonalities of pattern among important types of stories. Joseph Campbell (author of *The Hero with a Thousand Faces*), for example, believed that there is a single pattern for one type of story—the heroic journey—and that all cultures share this pattern. Homer’s *Odyssey* may be one version of a heroic journey, but every story of a person overcoming obstacles (and having adventures) on their way to a goal evokes this archetype. The *Odyssey* was retold in the recent movie *O Brother, Where Art Thou?* In both book and movie form, *The Lord of the Rings* is another modern telling of the story of a reluctant hero.

Still other stories evolve and change over time. They keep their basic narrative, but change their message as they travel between cultures or across time. The book *Little Red Riding Hood Uncloaked* traces the evolution of this familiar story and how it has been adapted from the original fable of sexual morals in the sixteenth-century court to a modern lesson of self-reliance in a dangerous world. Along the way, it has become a cultural icon strong enough that any image of a red cloak, hat, or hood is enough to evoke the story (as shown in Figure 9.2).



FIGURE 9.1: This storyteller figure is a modern variation of a long tradition of Pueblo pottery figures, first created by Cochiti Pueblo artist Helen Cordero. They capture the sense of story as a timeless art form. [Michaelis (2004)] (Helen Cordero, “The First Storyteller,” 1964 from the Girard Collection, Museum of International Folk Art (Santa Fe, NM)) (Photo by Michel Monteaux. Reprinted with permission.)



FIGURE 9.2: *These four illustrations—from the original story by Perrault in 1867 to a modern comic book, record album cover, and costume—show the enduring power of Little Red Riding Hood as a character: (a) illustration from *Les Contes de Perrault*, dessins par Gustave Dore, Paris, J. Hetzel, 1867, (b) cover of *Classics Illustrated* junior comic book downloaded from <http://ksacomics.com/cj/n/510.htm> (Copyright © 2004 First Classics, Inc. All rights reserved. Reprinted with permission.), (c) cover of “Sam the Sham and the Pharaohs” album downloaded from www.robert-kruse.com/samudio/pages/albums.html (courtesy of MGM records/ United Artists Corporation), (d) adult costume downloaded from www.lovethegifts.com/prod.itml/icOid/7626.*

This ability for just a few details to stand in for an entire story and its characters is part of what makes personas work. Like characters in myths and folktales, personas are archetypes, standing in for a type or group of people. With the right details and well-chosen stories, you can create the outline of an entire life history, personal attitudes, and motivations.

STORIES ARE NOT JUST FOR BEDTIME

It is all storytelling, you know. That is what journalism is all about.

—Tom Brokaw

It is easy to dismiss stories as fiction, something just for amusement or art, just a little bit of “once upon a time.” Even if you take stories seriously as an underlying cultural motif, it can be difficult to see how they apply to business. But as you will see, stories are just as powerful

within a business context, serving the same purpose of communicating key elements of the culture as they do in the larger society. These stories are different from those created for entertainment, but they draw on the same traditions and power.

Knowledge management and corporate communication intersected when people such as Steve Denning and John Seeley Brown saw storytelling as a way of organizing and transmitting information. They also focused on its value as a catalyst for corporate change. A research group at IBM called this “knowledge socialization” as they focused on ways in which the strength of storytelling can be used to enable informal knowledge transfer. Three of the roles stories play in an organizational setting also explain why the story of a persona is such a powerful tool: stories allow you to (1) communicate culture, (2) organize and transmit information, and (3) explore new ideas.

Stories communicate culture

If stories are part of being human, our stories show us (and tell others) who we are. In an organization, stories create a shared history and communicate the values or issues important to the company.

Peg Neuhauser, who writes about storytelling in corporate culture in *Corporate Legends and Lore*, talks about the power of storytelling as a management tool and as a means of communicating culture and preserving a corporate history. These stories serve many purposes. They may share an event that makes people proud of their organization, help the group “let off steam,” or identify the values of the group.

Neuhauser points out that any “series of events can be told as a positive story or a negative story. It all depends on the telling” [Neuhauser 1993]. Neuhauser stresses the importance of constructing a story so that people learn something from hearing it. This is the “spin” you put on a story; the point of view it communicates. For example, a story about someone having trouble using a piece of software could be about how dumb users are, or it could be about how they think differently about a task. A story does not need to have a happy ending to be one that communicates well. A good story for a persona is one that helps illustrate the persona’s point of view.

Example

SAME PROBLEM, TWO CULTURES

Which story sounds like your corporate culture? Which would you like to be part of?

“Chris was leading a team design session on a part of new installation that was giving people trouble. After several hours, the team gave up, deciding that this was something that users would just have to learn to do. ‘If they want to use computers, they’ll just have to figure it out.’”

or

“Jason took his third call in one day from customers having trouble installing the new product. He realized that there was an easier way to explain it, and added a note to the service knowledge base. He also sent a note to the product team, so they would know about the problem, and could make a change in the next release.”

Stories organize and transmit information

One of the goals of knowledge management is to capture the information spread around the organization and make it available in a form everyone can use. There are two problems knowledge managers encounter. The first is collecting information. It is notoriously difficult to get people to contribute to knowledge management systems. The work of thinking through the lesson learned, writing it down, and fitting it into the online format becomes an extra task that is often the one put off until later. But most people tell stories naturally, especially when they are the “hero” of the story.

John Seely Brown and Paul Duguid write about this in *The Social Life of Information* [Brown and Duguid 2000], where they describe how the Xerox copier field service staff would meet at local restaurants for breakfast or after work. These sessions served a social purpose, but they also allowed the technicians to swap stories about problems they had encountered—and their solutions. Through these stories, they shared complex technical information about the difficulties of their work in a memorable way.

The second problem the knowledge manager encounters is how to make these stories available to a larger audience. The copier repair stories spread easily because they were valuable to other field service technicians. The difference between a story and a simple procedure is that the story includes context. When the reader can identify with that context, it makes it easier to know whether the story is the right answer to a problem and how to make use of the information.

Story from the field

STORIES MAKE DETAILS VIVID

This is a story from a user research session on how people look for health information online. When we asked the participant (let’s call her Alicia) how she found Web sites to visit, this is what happened:

“Alicia picked up her handbag from the chair, opened it and pulled out a wad of paper. There were magazine and newspaper clippings, little note papers and wrappers with notes written on them. She said, ‘My girlfriends and I are working on this together. We find these Web things—what do you call them? Earls?—everywhere and we get together to try them out. We’re kind of teaching each other. It’s fun.’”

We used this story to illustrate a point in our report about how the people we talked to browsed the Web with someone else. It made our point more memorable than if the report just said, “Seventy-five percent of our participants reported co-browsing activities with family members or other friends.”

Another reason stories are a good way of transmitting information is that they are easy to remember and retell. (That they may add just a bit of fun to dry material does not hurt either.) When people need to know exact details, they can be included along with the story, but it is the story that makes the core information memorable by providing a context and a narrative. The message often survives long after the data has disappeared, and even if the exact story is changed or forgotten.

A good story about a persona uses details from the data you gathered and weaves them into a compelling and memorable narrative. The use of specific details grounds the narrative in a believable reality, but it is the message—the point you want the team to remember—that makes the story a useful part of the design process.

Stories explore new ideas

Stories can look back to preserve and explain the past, but they can also look forward. When you are trying to instigate change, the most difficult part can be getting everyone to see that things really can be different. Stories are a great way of exploring alternative visions of a future that does not yet exist.

When you present a new idea as a story you change the dynamic of the discussion from detailed technical discussion to one that looks at the core of the idea. Everyone in the discussion is encouraged to think about how they can contribute to making a vision come true, instead of seeing how many flaws they can find in the proposal.

Stories from the field

STORIES OPEN UP THE IMAGINATION

Saul Carliner, an expert in instructional design, created a workshop exercise that shows the power of stories in bringing ideas to life. He divided the group into small work teams and handed out project briefs. The assignment was to create a conceptual design for the online help for a new class registration system. Half of the groups were bogged down in the outline of the help file, while the other half had imaginative ideas that focused on the different people who would use the tool. When the groups swapped project briefs, they understood immediately what had happened. The first groups had been given a list of key functionality and three-line user definitions. The others had short character descriptions and stories illustrating different ways users might register for classes.

The moral of this story? Put stories into your design process and get more imaginative designs as the result.

Saul Carliner, *Presentation at STC 2003*

Video Guy :30

Jimmy adjusts himself into a more comfortable position as camera dollies back ...

5A



V.O. (mother cont.):
...have you seen it?

... revealing TV issues piled up under the cushions.

5B



Jimmy considers his situation.

6



ANNCR V.O. :
Hiding something ...

Over the shoulder shot of papers sticking out from under sofa cushions

7



... from your mommy?

2

FIGURE 9.3: Commercial film storyboards translate the script into visual frames, showing a sketched version of a "working plot line." (Storyboard by Luis Castillo, image courtesy of Leigh Devine.)

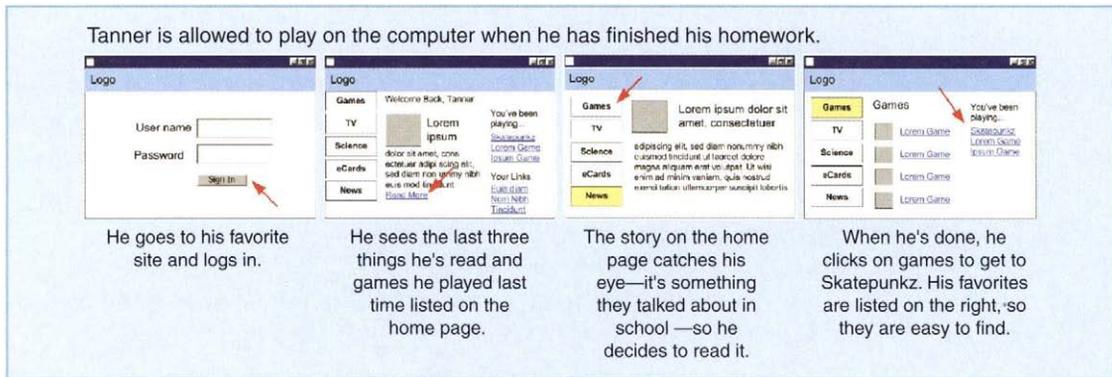


FIGURE 9.4: Storyboards for software show how the persona (and eventual users) might interact with the program.

In his article “Design as Storytelling,” Tom Erickson [1996] defines a good story as one in which “people have been engaged, drawn into discussion of ideas about which—before the story—they would have had nothing to say.”

In filmmaking, storyboards (see Figure 9.3) are used to map out the details of the movie and serve as a transition from the words of the script to the multimedia of the finished film.

Persona stories can be illustrated with early design sketches in a sort of storyboard (see Figure 9.4). This combination of narrative and visual presentation can help communicate a new idea, even in an early, evocative form.

Inspiration

STORIES HELP US IMAGINE

Stories have the felicitous capacity of capturing exactly those elements that formal decision methods leave out. Logic tries to generalize, to strip the decision making from the specific context, to remove it from subjective emotions. Stories capture the context, capture the emotions. Logic generalizes, stories particularize. Logic allows one to form a detached, global judgement; story-telling allows one to take the personal point of view, to understand the particular impact the decision is apt to have on the people who will be affected by it.

—Don Norman, *Things That Make Us Smart* [1994, p. 129]

Most techniques for user and task analysis use logical methods to carefully look at each detail of a problem. A Design Map is a detailed walkthrough of a specific scenario. Stories, in contrast, focus on the people and the situation. The story that kicks off a Design Map provides the persona and the starting context, and might include the general shape of the design solution from the point of view of the persona. We will examine the difference between scenarios and stories further as we look at how to create a good story. All three uses of corporate storytelling relate directly to personas.

- As part of communicating culture, personas' stories share their cultural history, giving them a context and a point of view communicated in a highly efficient way.
- When we need to organize and transmit information, personas are a good way of encapsulating a lot of information in a short, coherent format.
- Personas (and their stories) allow you to explore new ideas and possibilities for interaction with the new product.

THE WELL-CRAFTED STORY

A good story cannot be devised; it has to be distilled.

—Raymond Chandler

In writing stories for personas, you have to consider the purpose of each story, and then select the facts and shape the story to make the point. A complete story has to have facts, context (frame of reference), characters, plot, and resolution. In other words, something has to happen in the story. The stories created for personas show them in different situations and how the “problem” of that situation is resolved. Fragments of stories can also be used as an introduction to set the stage, introduce a situation, and connect the audience to the information that will follow.

Speechwriters (and scriptwriters) know how to use storytelling techniques to get the audience interested in the subject. A short example from the television show “The West Wing” is a good illustration of the difference between an overblown introduction and telling a story. In this episode, President Bartlett is rehearsing an introduction to a show about space exploration. He starts by reading what the agency press department has written.

Good morning! I'm speaking to you live from the West Wing of the White House.

Today we have a very unique opportunity to take part live in an extremely historic event which....

At this point, he stops and asks his speechwriters to do better. The version they come up with is quite different.

Good morning. Eleven months ago a 12-hundred-pound spacecraft blasted off from Cape Canaveral, Florida. Eighteen hours ago it landed on the planet Mars. You, me, and 60 thousand of your fellow students across the country along with astro-scientists and engineers from the Jet Propulsion Lab in Southern California, NASA Houston, and right here at the White House are going to be the first to see what it sees, and to chronicle an extraordinary voyage of an unmanned ship called *Galileo 5*.

In 81 words, they created a mini-drama with a background (a spacecraft hurtling through space), a situation (it is recently landed on Mars), characters (you, me, 60,000 students and rocket scientists), and an event about to unfold (seeing what *Galileo 5* sees). Who wouldn't want to stay tuned to see what happens?

Good stories are short

Attention spans are short, so our stories need to be short as well. The goal is to make a point quickly and effectively, not just to entertain. This compression of data is an important benefit of using personas. They boil down a lot of user research into a package that is easy to communicate. So, persona stories must be efficient, too. Stories do this very well, because they suggest data rather than spelling it out.

The examples in this chapter are all less than 350 words (about half a page) and take just a minute or so to tell. Although there are times when a story needs to be longer, the best stories are the result of ruthless editing that eliminates all unnecessary words and extraneous detail.

For example, think of what we know about Tanner, the central persona in the G4K case study (or about any of the personas in the book). If you wanted to tell someone about him, you could give them a long list of facts, but you could also tell a little story like this one:

Tanner was deep into a Skatepunkz game—all the way up to level 12—when he got a buddy message from his friend Steve with a question about his homework. He looked up with a start. Almost bedtime and his homework was still not done. Mom or Dad would be in any minute....

Even in that short beginning of a story, we have learned a lot about Tanner.

- He is a kid (he still has homework and a bedtime).
- He is an avid computer games player, and good at it.
- Maybe he's not such a great student.
- He has friends who also use the computer.
- Getting a message is an everyday way to communicate.
- He is probably on a cable modem or some connection where it does not matter how long he stays online.

- He is probably playing in his room, or somewhere his parents cannot see him and watch exactly what he is doing.
- We might be able to infer that his family is comfortably well off.

This story is a memorable way of communicating both a long list of facts and all of the analysis that went into understanding them. The power of using stories is that they can do these things in a few words. (This example was inspired by work by the IBM Research project on knowledge socialization. [IBM 2003])

Good stories have just the right details

A good story has the right details. Too little detail and the story loses authenticity; too much and it gets bogged down in the minutiae of a single instance.

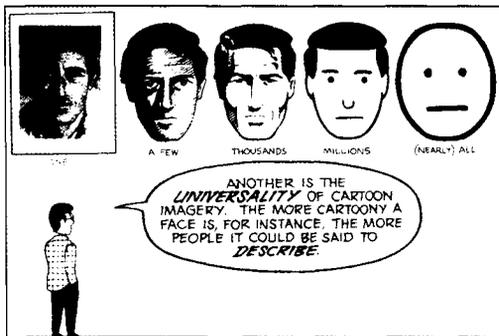


FIGURE 9.5: *What makes cartoons so appealing? Scott McCloud shows us that specificity can get in the way of universality. The more detailed an image of a face the fewer people it can represent. (Copyright © 1993, 1994 by Scott McCloud. Reprinted by permission of HarperCollins Publishers, Inc.)*

Sometimes it can be better for the details to be a little sketchy. In *Understanding Comics*, Scott McCloud talks about drawing comic book characters. He says that the less realistic the drawing style the easier it is for the audience to identify with the characters [McCloud 1994, p. 36]. “The cartoon is a vacuum... an empty shell that we inhabit, which enables us to travel in another realm. We do not just observe the cartoon, we become it.” (See Figure 9.5.)

This sounds backward. Is not one of the values of personas and stories that they are specific, rather than general descriptions of “a user”? You need enough of the right details to represent what you know about users, but you need to not be so quirky or overly specific that the story can only represent one person in one situation. The trick is to make the outline, or general shape of the character, easily distinguishable, but not fill it in so much that you leave no room for each person’s imagination to work. You need to make the stories unique, but neither so specific that they can be disregarded nor so generic that they could apply to anyone.

When you pick the details for a persona, you think about which pieces of information will help people understand the archetype. The same thing is true of a story. In telling a story about Tanner, it probably does not matter what color his shirt is, or even what type of shirt he is wearing. It may not matter what he ate for lunch, or who his favorite teacher in the fourth grade was. However, if you were trying to explain how technologically advanced Tanner is you might start a story this way:

Normally it was a drag to have to wait for his kid sister to get out of her soccer practice, but his new wireless card and the discovery of a hot spot at a nearby store changed all that. Tanner was hanging out running a chat with some of his friends and playing games when....

Choose the details for your stories to provide a context or frame of reference. In as few words as possible, you want to let your audience identify with the situation. Then, you can use the events of the story to paint a picture of how the product will help the persona do something better than he could without the product.

STORIES WORK WHEN PEOPLE BELIEVE IN THEM

Storytelling reveals meaning without committing the error of defining it.

—Hannah Arendt

What makes people believe in stories, or makes stories create that “Aha!” of recognition? Stephen Denning, an advocate of storytelling as a way of instigating change, has studied what he calls the “springboard effect” [Denning 2000, 2004], which helps people get inside an idea and experience it from the inside, not just as a collection of facts. When this happens,

Example

STORIES SPARK THE IMAGINATION

Stephen Denning's example of a springboard story is the one he used to start the idea of the World Bank as a knowledge-sharing organization.

He starts, “Let me tell you what happened in Zambia.... In June, 1995, a health worker in Kamana, Zambia logged on to the Centers for Disease Control Web site in Atlanta and got the answer to a question about how to treat malaria.”

In the World Bank, the point was that if this can happen in a small town in Africa, it can happen anywhere; if it can happen in the CDC, it could happen in the World Bank; and if it can happen in 1995, it can happen now.

What this story did was start the World Bankers thinking about why it wasn't happening there, and how they could make it happen. The story was the spark that turned the World Bank into a model for making their information available.

Stephen Denning, *The Springboard*

stories act as accelerators that can light a fuse. They help people connect the information they already have to create a new idea. He says that stories with the springboard effect are:

- *Understandable to the audience:* They have to show a situation that is at least familiar to the audience, and which they can identify as a problem. Persona stories that show how a known “point of pain” can be eliminated are easy for a team to understand and empathize with.
- *Told from the perspective of a single central character, the protagonist:* This is, of course, exactly what personas do: create a central character for the stories.
- *Prototypical:* Just as a persona must be a “typical” (or archetypal) person, the story must be a typical situation. You can use stories to explore unusual situations, but the stories to start with are those that would happen frequently or represent typical uses of the product.
- *Have a degree of strangeness or incongruity, but are verily familiar:* If the story just sounds like “life as we know it today,” there is not much reason to tell it. The story about the Novartis customer service worker is based on anecdotes from user research but was clearly on target as an example of a real situation.
- *Are based on a real event:* In fact, Denning suggests that your springboard stories should be based on facts or stories that have really happened. Grounding them in reality makes the inferences or results you draw from them more believable. The story of the aid worker in Zambia started as a real event.

Example

THE STORY THAT CAME TRUE

When we were introducing a new set of intranet tools at Novartis Consumer Health, we created short stories to illustrate how they might be used. This was one of them:

“February 17th. 11:23 a.m. London, England: Susan Bentley needs product information. She just received an inquiry from a pharmacist concerning a customer on vacation from San Francisco who lost his allergy medication. He needs to find a place to purchase it in the UK or to have an alternative.

Sue uses the Product Encyclopedia to access the entire consumer product database. A search by product name, ingredient and country produces three different options. She contacts the pharmacist and forwards the information.”

Shortly after release, the project manager received an email with a series of messages that were almost exactly the situation we had imagined in the story. Talk about eerily familiar!

The more your stories can be based on things you have observed in user research the more compelling they will be. You may have to fill in details, or adapt them to fit precisely into the situation, but if they start from a real event they have more authenticity.

Ginny Redish [2001] has pointed out that you can make up scenarios, but when you do you are likely to “write *from* requirements rather than *for* requirements” and you miss the interesting stories because they are not the most typical.

There are two other advantages of using anecdotes from your research. One is that the “voice of the user” comes through more clearly when you do this. It keeps the personas from going feral—changing and mutating to fit into new scenarios. The other is that if you are challenged you have the data to back up your story.

It is especially important to start from a real context or event if you are using a story to illustrate a new idea. The more innovative or unexpected the idea the more it must start from a familiar context. The pattern for a new idea for a story is simple. You start by painting a picture of the situation. If the problem is not well understood, you can tell the negative story of how bad the problem is right now, which can be an effective way of making a team aware of the problem. Then, you lay out the scenario of how the new idea resolves the problem in a new and positive way. The following is an example.

One Sunday afternoon, Jane decided to give online banking a try. In the middle of registering, she was confused by an error message. Seeing a “contact us” link in the message, she doubtfully typed in her problem and sent it off, thinking, “A lot of good that will do on a weekend.” But that same day, she got a message with the name and direct number of someone to call—and got right through! The technician fixed the problem and got her account set up. She’s been an online banker ever since.

This is a story that resonates well with people who use e-commerce Web sites. They immediately recognize the problem: they try new things in the evening or on weekends and can rarely get help when they need it. Their usual reaction is to begin telling their own stories about their terrible customer service experiences with online shopping or services. Think about your own reaction to this story. Did you think, “Fat chance!” or, “Yeah, that level of support would be a real winner in our marketplace.” Either way, it can spark a good discussion about how and when customers will use the site, and what they might need to be successful.

When you create personas, and scenarios for them, you are making up stories. These stories must ring true—sound believable—to be compelling. It is not necessary that each story be journalistically accurate, but they will be more compelling if they are based on facts and real anecdotes. In fact, the story about Jane and the online banking service is based on a real event. Really. I could not make up something like that.

PUTTING STORIES TO WORK

It takes a thousand voices to tell a single story.

—Native American saying, tribe unknown

Until now, we have focused on stories as an efficient way of establishing context and of helping someone get to know the persona better. They set up the situation in which the persona will interact with the product. More detailed stories can also be used to explore specific tasks or interactions. These stories are sometimes called scenarios.

Example

SIMULATION SCENARIOS AS STORY

In his book about his years as a NASA flight director, Gene Kranz tells a story about how they used scenarios to plan for a flight. They ran simulations that tested the crew and their equipment under both normal and unusual circumstances. Just before the first moon landing, they ran a scenario that included an error message. In the simulation, they aborted the landing based on this error, but in debriefing, they discovered that they need not have done so. They stayed up all night to revise their procedures, so they would be able to tell a dangerous situation from a harmless warning. The best part of this story is that this scenario actually came true, with the same error occurring in the real flight. Without that simulation, Armstrong would not have landed on the moon.

Gene Kranz in “Failure Is Not an Option”

STORIES AND SCENARIOS

What’s the difference between a story and a scenario? These words have been used so loosely for so many years that there is not a hard line dividing them. Both refer to techniques for creating sequential narratives, telling us what someone did (or might do), in what order, and what happened (or might happen) as a result of their actions. And both have many different variations built into common practice.

Let’s start by looking at how stories and scenarios are used. A good overview of different types of scenarios used in the design process is from JoAnn Hackos’ and Ginny Redish’s book *User and Task Analysis for Interface Design* [Hackos and Redish 1998]. They discuss four levels

of scenario: brief scenarios, vignettes, elaborated scenarios, and complete task scenarios. These scenarios grow from a brief description of a user's goals a product must handle, to a specific story of a user trying to reach a goal but without details of steps, to one that shows the details of the tasks and steps in the interactions. They grow in depth and scope, and they fill different places in a design process as they move from broad exploration of users, context, and goals to a detailed view of the task and steps in an interaction.

Another way to look at stories and scenarios is to see whether they appeal to logic or emotion for understanding a problem. There is a continuum of types of narratives that runs from the purely evocative at one end to the purely prescriptive and factual at the other. If we plotted the various types of scenarios and stories they might look as shown in Figure 9.6.

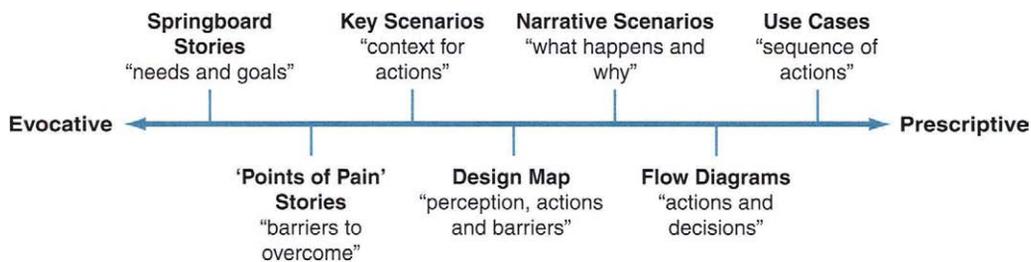


FIGURE 9.6: A continuum of stories.

As you move from left to right on this chart, you move from types of story (or scenario) whose purpose is to explore context and motivation to those that help explore the details of the interaction. This also maps to the progress of a design process as it moves from initial discovery and exploration to detailed interface and interaction design. To be effective, you need to use the right type of story for the right reason (and at the right point in the process).

Let's look at some examples of each type of story, using Tanner Briggs and the G4K case study. The first four are narrative stories. The last three are diagrammatic tools that can be used to look at the program structures the stories suggest.

A springboard story

These stories may be the most difficult to write. Like a haiku, they must be short and compelling, both illustrating a dilemma and hinting at the way out. They may be the spark of a new innovation, or based on an anecdote from user research. This story conveys a moment in which Tanner and his mother begin to see their home computer as more than just a games machine.

When Tanner comes home from school, he logs on to G4K and collects the essay he began during study period in school. He is usually not allowed to play games on the computer until he finishes his homework, but he tells his mother, “This is my homework.”

This story sets the stage by creating a short vignette with the context and the problem revealed in just a few words. Tanner wants to spend more time on the computer. His mother wants him to do his homework. Can we provide a way to bridge this gap?

A “points of pain” story

These stories illustrate problems, and often can point forward to possible solutions that could be part of the new design. They create a vivid view of the problem from the point of view of the persona. There are many different types of pain: gaps in the process of reaching a goal, places where current solutions do not fit together, usability problems that make a task more difficult than it should be, or new needs that have no current solution at all.

Ten minutes is not enough. That is Tanner’s opinion about the time limits on using the computer at school. Last Friday, he started working on a geography assignment. He used the school encyclopedia program to look up some information about the animals in Africa. He had just gotten started when his turn on the computer was up. He’d like to work on it over the weekend, but he does not have the same things on his computer at home. He prints out a few things, and figures he will retype what he’s done when he gets home. What a bore.

This story shows how a reasonable-sounding rule limiting the time students can spend on the computer can be seen from another perspective. For Tanner, the rule just makes it more difficult to do his homework. The story illustrates the “point of pain” so that everyone can understand the problem from the persona’s perspective, rather than arguing about what “a user might do.”

A key scenario

These stories lay out more complex scenarios the design must accommodate. Where the first two types of stories are intended to be evocative, key scenarios start to move into concrete illustrations of how personas (and real people) interact with the product.

Tanner has been a member of G4K for a few months. He’s been traveling (virtually) on an animal safari, along with two of his classmates. They are thinking about doing a science project that shows the various types of animals that live in their backyards, just like the program shows animals living in different parts of the world. He wants to save some of the cool pages he’s been finding and then go back and look at them again later.

His mother, Laura, discovers that she can create a personal folder for him to save pages he finds. They talk about it and decide that this will be better than just using the browser

bookmarks or printing out the pages. Laura uses her parent password to create the folder, and the next time Tanner signs on to G4K the folder is waiting for him in the corner of the screen.

The next day, at school, Tanner collects some great pictures of animals while his friend starts to draw out the chart of their backyard environment. That evening, at his friend's house, Tanner logs on to G4K, opens his folder, and shows all of the pictures he has found. They talk about which ones they like, and decide to print a few of them out to paste onto the chart.

This scenario begins to elaborate on how Tanner might use G4K. It not only shows how the personal folder feature might be used but puts it in a social context and shows how it supports Tanner in his task of completing a school assignment.

A narrative scenario

As the design is developed, these stories present an entire task in narrative format. The story format carries context and other environmental information to help make sure the proposed design, flow, or use case makes sense when seen from the point of view of a persona. These stories are usually longer than more evocative types of stories because they need to follow a task or scenario from beginning to end.

Laura has a busy life keeping up with her two kids, house, and job. She thinks it is important for her son, Tanner, to learn to use computers, but she worries about all the things she's read about the Internet. Tanner, on the other hand, thinks that computers are just great.

When Tanner is playing Skatepunkz, he sees a Web address on the splash screen and decides to go check it out. First he writes down the address carefully. Then he dials in to their ISP, signs on to the Internet, and types in the URL.

The G4K home page comes up, and he is immediately attracted to the Get a Hint logo he recognizes from other Gigantic games. He uses the mouse to click on the icon.

He reads the free hint, but also sees a link to get more hints if he signs up. He clicks on the link and types in his name. He's not sure about what password to use, so he enters the same one he uses to get onto the Internet.

The next thing that happens is a bummer. He sees a message that he needs to get his parents to give him permission to go into this site. He turns off the computer and waits for his mother to come home.

After dinner, he finally gets a chance to tell her about this new site. They turn on the computer together and go to the Internet. Tanner shows her the G4K page, and signs in. The same message comes up, saying he needs permission from his parents to continue.

Laura clicks on the “Information for Parents” link and takes a few minutes to read about the site. She decides that this site is okay for Tanner to visit and signs in to give him permission, setting up her own parental password.

Narrative scenarios explore how the design implements a complete task or workflow. In this example, the task of signing up for G4K includes two people and at least two different sessions on the computer. These scenarios are a good way of reviewing the overall flow of the program set in a real-world context. Do all of the features fit together? Do they support the way the persona will actually work?

A Design Map

In creating a Design Map, the team explores some of the details of an issue, either in preparation for creating a scenario or to explore one more deeply. The steps in the process are seen from the persona’s point of view and may or may not involve the product.

The Design Map shown in Figure 9.7 decomposes the story into the details of the steps Tanner will take, and provides a way of exploring the questions, ideas, and assumptions that must be addressed in the final design. (For a complete view of this Design Map of the sign-up process, see Chapter 10.)

Design Maps can be used to explore a key scenario more deeply, or to look at the interaction details of a complex feature, as this illustration does. Design Maps help the team shift from the vision of motivation and inspiration of the early stories to the concrete specificity of a completed design.

A flow diagram

Flow charts are a commonly used technique for walking through the logic of a process. They can be done at a very technical level for a system design, but they can also be used as part of a user interface design process to show the different pages and ways of moving from place to place. Used this way, they are like the skeleton of a narrative scenario, mapping out the pages that have to be designed. An example is shown in Figure 9.8.

Flow diagrams allow the reader to explore possible experience paths, but are not narrative story techniques. You can use them to discover stories, or to identify points of pain that might show up in an overly complex flow. They can also be used to analyze the implications of a story and how it might be implemented in the design.

Use cases

Use cases were developed as part of UML – the Unified Modeling Language for object-oriented design. Although there are many different templates and formats for creating use cases, they are usually a sequence of actions by the “actors” (which include people, processes,

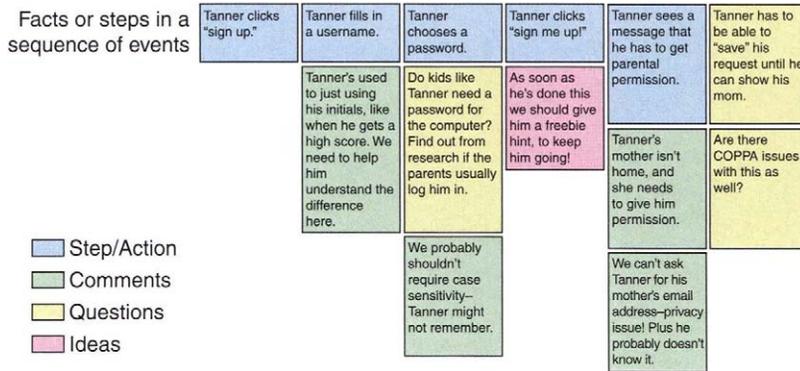


FIGURE 9.7: Example of a Design Map.

and machines) that interact during the use of a system, mapping out what happens during a transaction. Consider the following:

Task: Log on to system, with a pending parental permission

1. *The user requests a page in the Web site.*
2. *The system looks for a saved log-in ID, and displays the log-in page if not found.*
3. *The user enters log-in name and password.*
4. *The system validates the log-in and looks for a parental permission token for this account.*

And so on.

Use cases are another way of looking at the details of the interaction. Where Design Maps focus on the human side, use cases look in more detail at how the computer system functions. If use cases are part of your development process, use them to make the bridge between your scenarios and implementation details.

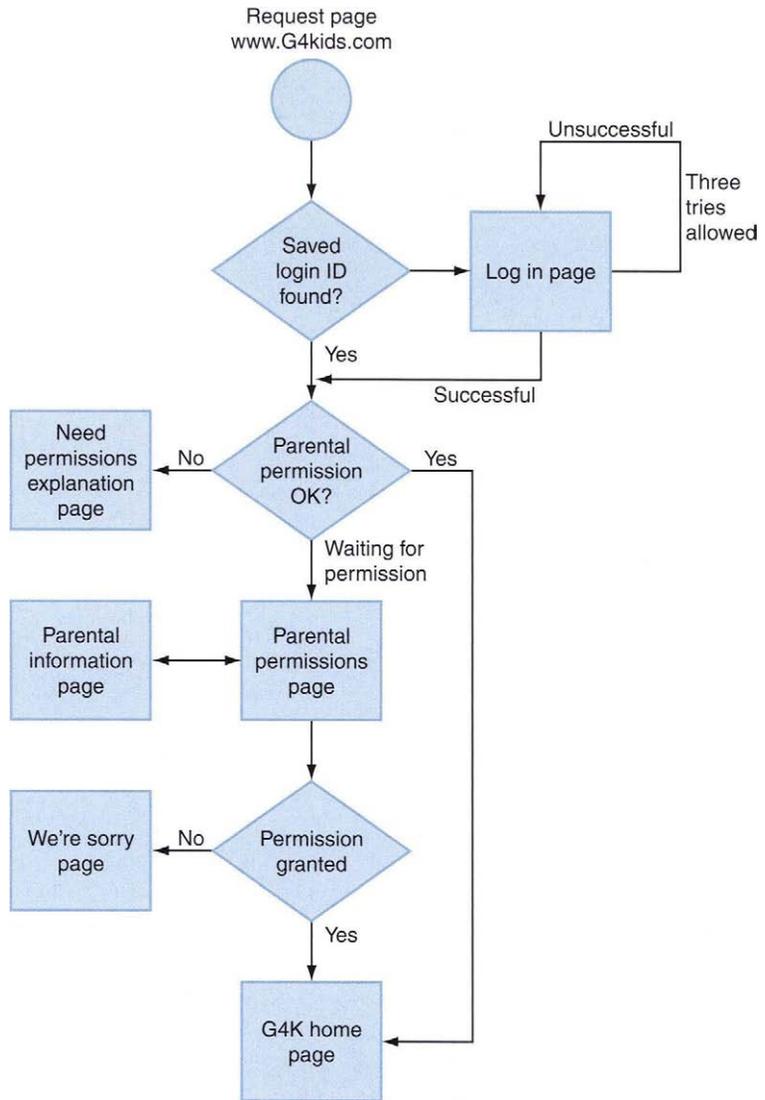


FIGURE 9.8: Flow diagram.

CRAFTING A STORY

The dirty secret of art is you do not have to show people your bad writing. That is what we have the delete key for.

—Robert McKee

Inspiration

WRITING EXERCISE

In college, we were given writing assignments to write “in the style of” famous authors. It’s amazing how much easier it is to start writing if you’ve just read someone else’s work and can mimic their prose voice and style.

If you are having trouble getting started, reading other stories can help you get started. They can be stories from this book, from other projects or anecdotes from user research. Just make sure you have your own goals and characters in mind as you start to adapt the stories to your own project. It sounds basic, but it’s an easy way to get going.

Tamara Adlin

Let’s get over writer’s block first, and how difficult it can be to get past the blank page. Even people who like the idea of personas, and who understand the power of scenarios of use, can get the jitters about writing a story. They think they do not write well, are not “creative” enough to create a good story. But persona stories are not about great writing, and they are not really about creativity. This type of storytelling is a design technique, using a narrative form to make a point. The goal is to communicate what you have learned in a powerful and persuasive way.

Like the personas themselves, their stories start with a goal—a clear reason for the story to exist. The story is then structured from what you have heard or seen, details you have observed, and anecdotes or phrases that were particularly memorable.

Stories are very simple to create, with few hard and fast rules. We will cover the basics: the reason to create a story, the elements that make up a good story, and techniques for improving and refining your stories.

Reasons to write a story

Stories show personas in action and help you and the rest of the team explore how the personas might interact with your product. As you work, be clear about your goals for each story and what you are trying to communicate. You can write a story to:

- Establish a situation or context
- Illustrate a problem or a positive experience
- Propose a new solution.

Establish context

Stories that establish context help round out the personas by supplying vignettes of their lives. These stories may show problems, but more often they simply help the team understand the persona better. The action of the story may not involve the product, and the resolution may be incomplete. They can be used to help introduce a persona and may be the basis for the team's understanding of the situation in other stories. The story about Tanner works to establish context. The following story should help dispel any notion that payroll for a small company is done in a quiet, organized, and uninterrupted manner:

Marjorie is the office manager for a small construction company. In fact, she's the only person in the office except for the owner. She manages payroll, orders supplies, pays the bills, duns the customers, and handles any correspondence. Thursday is her busiest day because it is payday. Each of the site managers drops by to turn in time cards, pick up their crew's checks, and have a little chat. It is their one chance to actually see each other during the week, and Marjorie uses it to keep in touch with "her boys" as well as take their orders for supplies. Of course, none of this stops the phone from ringing with the usual daily business. Today, everything was crazy, so it is 5:30 and she's just finishing the bookkeeping...again. It is quick and easy spaghetti for dinner again tonight!

When actors start to work on a new script, they sometimes create "back stories" for their characters. These are stories about things that happened before the action of the movie or play begins, and they help the actor understand the character better. These types of stories can help the team get to know the persona better. They provide a type of running start so that you can see what happened to the persona before any interaction with your product begins.

There is a danger in background stories. They can be seen as irrelevant, taking you off track into discussions of "what the personas ate for dinner" rather than things that have an impact on the product design. The following version of a context story about Marjorie does little to provide useful insight for a team working on a payroll program.

Marjorie is the office manager for a small construction company. She always dresses carefully for work. Her pants suit is neatly ironed, and she wears the scarf her nephew gave her for her birthday. Today, she needs to take her car to the shop, so she makes sure she wears a pair of flat shoes so that she can walk to the office after she drops it off. As she walks back to the office, she does a little window shopping. Then, she spends a hectic afternoon finishing the payroll.

If you decide to include personal details or background in a story, make sure you have a clear goal and that the story clearly relates to how the persona might use (or not use) the product.

Illustrate a problem

Stories that show a problem typically show how the current situation prevents the persona from reaching a goal or completing a task. They illustrate the points of pain by showing them in a dramatic way, and provide some explanation for how the persona behaves. These stories may end badly and seem negative, but the implication is that the new product will change the ending. You can use these stories to explain what problems the personas are encountering with the current product (or lack of one). The following version of Jane's banking adventures might be the trigger for a discussion about how to provide better customer support through a tricky registration process.

Jane had been using a home finance program for years, but had resisted online banking. While she was balancing the family checkbook one Sunday afternoon, she read a letter from her bank offering it for free. Why not join the twenty-first century, especially if they have finally met my price? she thought. In the middle of registering, she received an error message. She could not figure out how to go any further, even after calling a friend for advice and starting the entire process over. That night at dinner, she amused her family with her adventures online. She and her husband agreed that perhaps they were not ready for online banking—or maybe online banking wasn't ready for them! Jane tossed the letter in the trash.

You can also use these stories as the beginning of a conversation or to open up a design discussion. You might end them with some of the questions the persona has or that the story suggests. For example:

- Does Jane always pay her bills on the weekend? Are support staff available if she needs help?
- What are the various problems Jane might encounter? How many of them can we eliminate to be sure she gets through the initial registration?
- What would make Jane feel more comfortable, and help her get over her trepidation regarding online banking?

Propose a new solution

Finally, stories can explore new ways personas can meet their goals. These stories help explore possible new features and design approaches by showing them in action. They can be created early in a project, to propose design goals. They can also be used during the design process. For example, each story that illustrates a problem can be balanced with one that shows the personas succeeding.

Elements of a story

Once you have the goals of the story defined, there are only a few things a story needs to be complete. Whether the story is a short, evocative anecdote or a complex scenario, it starts from the basic “who, what, when, and why.” All stories need characters, situation, action, and resolution.

- *Characters:* The main character will be the persona, but there may be other members of the supporting cast.
- *Situation:* What is the beginning of the story? What is the context or motivation for what will happen? What is the main character trying to do?

Inspiration

THE ANATOMY OF A SCREENPLAY

There are many theories of writing, and systems for writing well. I like Dan Decker’s Character Structure as an approach to writing persona stories. He starts building a script by understanding the characters, rather than creating a plot. He defines four structural characters whose relationships and interactions are the basis for the action of the film:

- The Main Character – the person who makes the decisions that set the plot in motion
- The Objective – the person who represents the main character’s goal
- The Opposition – a person whose own Objective is mutually exclusive to that of the main character
- The Window Character – the person through whom we see the changes in the main character, and who is part of the story from beginning to end.

In the movie *Casablanca*, Rick (the bar owner) is the main character, Ilsa (played by Ingrid Bergman) is the objective, Victor Laszlo (Ilsa’s husband) is the opposition, and Capt. Louis Renault is the window character.

Dan Decker, *The Anatomy of a Screenplay*

- *Action*: Something has to happen. What is it? What influences the decisions the main character has to make?
- *Resolution*: What is the ending situation? What has changed during the story?

All of these elements must be clearly defined, but the most important thing a story needs is a reason to be told.

Putting it together

Before you start to actually write a story, make sure you have all of its elements assembled. It can be helpful to write out the answers to the questions outlined in Figure 9.9 in preparation for creating a story.

Think about the research you have for this persona and the situation or task. Are there any great observations, quotes, or anecdotes that can help bring this story to life? Next, put it all together into a short sequential narrative, starting from the opening situation and ending with the outcome. Do not worry too much about making the language elegant in your first draft. Just get it down on paper (or screen) so that you can see it take shape. Then, get ready to edit—or, as we like to say, iterate.

Element	Questions	Answers
Goals	What is your goal in writing this story?	
Character	Who is the persona in this story?	
	What other characters are involved?	
Situation	What is the situation before the story begins?	
	What is the goal of the main character?	
	What triggers the action of the story?	
Action	What happens during the story?	
Resolution	What is the outcome of the story?	

Figure 9.9: *Story element chart.*

Refining your story

Iteration is simply part of the process. Occasionally, a story will come out just right the first time, but most of us need to test and edit them to make them work. The first iteration is to edit the story yourself. Read the story out loud (or better, have someone read it to you) and listen to how it sounds. It should be “easy on the ears,” using everyday speech patterns. Look for and eliminate:

Inspiration

HOW HEARING IS DIFFERENT FROM READING

In a presentation at Storycon 2002 (a conference on many uses of storytelling), Doug Lipman talked about the role of the listener in oral storytelling. He reminds us that stories are interactive; they need a speaker and a listener, and the communication takes place in what happens between them. If you tell the stories (rather than writing them down for others to read), you must imagine the events as you describe them, or you will not convey the story well.

The key, he says, is to remember that stories are not *words*, but *images*. The role of the story is to create images in the minds of the audience; the words are just the bridge to these images.

The magic of stories is that the very specific subject of the story – 1 place, 1 time, 1 character, 1 action – allows the story to be more than a summary of events, and to trigger both the message and the meta-message as the listener imagines the events unfolding.

Doug Lipman, Story Dynamics

- *Technical or insider jargon*: Use the terminology (words and phrases) of the persona's own vocabulary.
- *Passive voice*: Stories are active. The persona does things (or did them, if you are writing in the past tense). Make the language of the story active, too.
- *Lengthy explanations that are distracting or confusing*: Keep the story as short as you can, without losing critical details.
- *Judgments or conclusions*: Let the events of the story speak for themselves.
- *Technical details that focus on the product rather than on the persona's actions and motivations*: Watch for overuse of actions such as "and then he clicked on..." that focus on the computer.

Next, usability test it. Tell someone else the story and see what they hear in it.

- *What is the portrait of the persona suggested by the story?* Ask them to describe the main character. This is a good way of determining whether you have remained true to the persona or are introducing changes you may not intend.
- *Do they understand what happens in the story?* Ask them to repeat the story back to you in their own words, to see if the narrative actions are clear.

- *Do they understand the point or message of the story?* Ask them what they take away from the story. You want to be sure that the story is meeting your goals for it.

Finally, see if the story rings true, making sense both for the persona and for the person listening to the story. If the story seems unbelievable (no matter how closely it is based on a real anecdote), you will spend your time justifying it and the story itself will be lost.

Inspiration

ALL THE LITTLE STORIES ADD UP

In an interview for the *New York Times*, the actor Kevin Bacon was asked about his work as a director. He said:

“To me, directing is telling a story. All day long, that’s all I do—in every single detail. Is she using a pencil, or is she using a pen? And what story do you want to tell with that? You see, you tell all these little stories in the course of a film, and then hopefully it all wraps up into one big story.”

Kevin Bacon, quoted in
“As for Directing, It’s Telling a Story”
by Dave Kehr, *New York Times*,
December 30, 2003

Finding the right details

One of the most difficult aspects of writing a good story is finding the right details, and the right level of detail. Too few specifics and the story is not grounded well enough to spark the imagination; too many and it drowns in unnecessary information. Use descriptive details to establish context, or to set expectations for the rest of the story. Consider the differences among the following descriptions of someone getting into a car:

- Mary got into her car.
- Mary slid into her brand new Audi A8.
- Mary herded her kids into the minivan.
- Mary climbed into the cab of her not-quite-antique pickup truck.

All of these tell us something about Mary through descriptions (or lack thereof) of types of cars. However, we probably do not care what color the vehicle is unless that fact will be relevant to the rest of the story in some way.

Any details you include should help reinforce the persona's character, goals, and roles. If you find yourself stretching to make up details, it is a good idea to reread your materials about the persona to keep yourself grounded. The types of details you use also place the emphasis on different aspects of the persona and the situation. The following are four descriptions of someone reading his e-mail:

- When John checked his e-mail, he had a crisis waiting for him... (emphasis on the crisis; e-mail is just setting up the context).
- John wandered around the airport until he found a WiFi hotspot so that he could check his e-mail. He liked to use flight time to answer routine messages, or prepare for anything he needed to get to right away when he landed... (emphasis on staying connected while traveling).
- John slid into his cube, and decided to check for any updates to his current support tickets before getting on the phone. He liked to keep his "in progress" cue as empty as possible... (emphasis on work patterns).
- After he got the kids to bed, John liked to disappear into his study and check his e-mail. Tonight, however, it was not for work. He wanted to see if he'd been the high bid in an online auction for... (emphasis on social context).

Finding a style and voice for the story

One of the attractive things about writing stories is that they can have a *bit* of fun to them. They can go beyond the neutral analytic language of most business reports and task analysis. In fact, they should. One of their roles is to provide a conduit for the personas' voices. All of those great quotes, quirky turns of phrase, and unexpected anecdotes help make the stories—and the personas—come alive. With that said, there are a few things to watch out for.

- Use the language and style of speech the persona uses, but be careful not to turn dialect or accents into a caricature. This is just as unacceptable in a story as in a picture of a persona. Unless you are *very* good at writing in dialect, this is best left to professionals.
- Do not use stories to poke fun at the persona, or at the product. Even if you have a direct quote from your research, remember that a story can backfire if it makes a team member too defensive.
- No matter how irate the language or behavior you observed, it is probably a good idea to keep the stories within commonly acceptable ranges, and leave out the profanity or excessive slang.

You must also decide whether to write the stories in first or third person. That is, are they being told *by* the persona or *about* the persona?. Use first-person stories if you want to let the persona speak directly to the team. These stories are good as parts of displays or when the story will be seen in print or on screen. First-person stories are also a good way of contrasting attitudes or goals among a group of personas, with each talking to the audience in his/her own words.

Use third-person stories when you will be telling the story to the team (whether in writing or orally). Unless you plan to act out the part, it is probably more natural for you to talk about the persona just as you would if you were introducing a new colleague to the group. You may also find third-person stories a little easier to write. Consider the following case study of a narrative written in first person.

Case Study

LETTING PERSONAS SPEAK FOR YOU

Back in 1995 the documentation department at AT&T wanted to convince the product teams to use online and multimedia documentation to replace the volumes of paper they created. The first version was a typical corporate presentation about the new technologies they wanted to use and how their ideas would benefit the company, which generated little enthusiasm.

We decided to create a new presentation that revolved around the needs of the many different people who use documentation. We created seven characters: sales rep, trainer, product team leader, repair technician, support center operator, customer telecommunications manager, and receptionist. For each character, we wrote a short story and created a video vignette lasting about 90 seconds. Each video showed the character in a situation in which online documentation made their work easier. We chose situations we felt were common, easily recognizable, and had a clearly identified pain point. The new presentation was a success within the company and won Best of Show in the STC International Online Communications Competition. But what made it work?

- It used seven different voices to make the point that many different people used the documentation and had different needs. As each AT&T department heard the presentation, they saw themselves portrayed sympathetically.
- The stories were short. Visual details helped create the sense of place, but the scripts relied on the beginning situations to make the point about the need, and focused on showing the solutions.
- The content was realistic and accurate. It was important not to have glaring mistakes that would annoy people who were very familiar with the products.
- The presentation was relaxed, in a style that did not get too serious and that encouraged the audience to sit back and enjoy the story. Two of the scripts even used outright humor.

The script from the Sales Rep episode (following) is written in the first person, with the character narrating the story as though she is talking to her colleagues. The music under the narration is from the theme from the TV show "Dragnet." An entire world of the sales department is evoked in just 94 seconds.

Sales Rep, working at desk in hotel room: *This is the territory. Big-time telephone sales. I'm sharp and I work for the best company in the business. But no one can know everything a customer might ask about a feature-packed system like ours. Or can they? This is the story.*

(Case study, continued)

It was 12:05 p.m. I got a last-minute appointment with a Fortune 500 bigwig at 2:00 p.m. I was hungry, and not just for food. I wanted this sale badly, but I had to work fast. My mind was racing. I remembered my successful presentation last month with another corporate hotshot. He had questions, tough ones. Thanks to the interactive documentation, I had answers. I knew what I had to do. I changed the name...and some minor details...to protect my methods. The system did the rest.

Sales Rep and Customer, in Customer's office: I showed him my stuff. How we stack up against the competition. What we can do for his bottom line. He was very impressed, but he still had doubts. He wanted proof I had what he needed, so he tossed me a live one. But I knew how to diffuse it. My secret weapon: Expert in a Box. It gets them every time. Lucky for me our competitors do not have it. He was buying, and I had a great late lunch.

It is like I always say: big-time sales take big-time sales tools. I'm glad I was armed with the powerful, fast-acting software from the documentation group.

AT&T Product Documentation Development Demo Project Team:

Jim Duyme (AT&T)

Andy Kienzle (scripts and video)

Todd Reichart (multimedia development)

Marc Reed (visual design)

Whitney Quesenbery (concept)

Practice makes perfect

If it seems uncomfortable to think about your work in terms of stories at first, stick with it. As you practice thinking about personas in action you will get better at it and stories will start to come more naturally.

Your personas do not have to start out with a full set of stories. Instead, they can evolve, with new stories added as they are needed to help the team work through design challenges. Using stories and scenarios to work through design issues is also a good way of keeping the emotional context of the personas' roles, goals, and tasks in the process. Avoid (especially in the early stages of design) constructions such as "...and then he clicks on..." This sounds more like technical documentation or a use case with names than a story that will help you understand how (and why) a persona might behave.

Inspiration

TEACHING PERSONAS

Both personas and stories are easier to *do* than to *explain*. A professor of technical communication teaches personas in her class on information architecture and Web content.

“At first (the students) didn’t see much value, but it was an easy assignment. Then they really got into the research and design of their particular persona, complete with picture and daily schedule.” In the end, “they loved the idea of personas.”

Gail Lippincott, University of North Texas

One way of using stories throughout the process is to employ them as aids in thinking about a problem from a different perspective. Even if you started out as an “outsider,” it is easy to absorb so much information about the product or software that you start thinking like an insider. Creating on-the-fly stories can help keep the personas in the center of the process. It is a good way of banishing the generic “user” from your work.

Writing the right story

The following are a few final thoughts to keep in mind as you write your stories. A good story does not have to be long. In fact, the more the purpose of the story is to establish a context or make an evocative point the shorter it should be. Your stories should not be much longer than the examples in this chapter. Be sure you are clear about the purpose of the story, and match the style to the goal you want to achieve.

- To get your audience to think about something in a new way, start with the known facts—perhaps the bad news about problems with the current situation. Then, as briefly as possible, suggest a direction or solution that could solve the problems.
- If you are trying to explore how one of the personas might react to a new feature, consider mixing short narrative sections that establish context with bullets or other visual techniques to make the sequence easy to follow.
- Do not overload your stories with too much detail. The information you include should be just enough to make the story clear. Remember that your personas already carry a lot of context and background information.
- Be true to the personas. Do not let the stories force them into actions or decisions that are not part of their personalities, or that are inconsistent with other things you have said about them. Stories that do not make sense are one sign that the personas are going feral.

SUMMARY

Stories set the personas in motion. The personalities and characteristics you have established for the personas drive the shape of these stories, just like the characters in a film drive the plot. If they are both believable and ring true, your design ideas are probably sound as well.

The stories you write for your personas help you explore the possibilities for interaction, whether you are working on completely new feature ideas or on details of the design. Personas and their stories have a power of persuasion. They allow one person (or a small group) to reach many and to ignite the imagination of an entire development group. They are more effective than argument because they are memorable and can be easily repeated, creating a “viral marketing” effect for your ideas.

The power of storytelling may be the single most important reason why personas work. In using personas and their stories, you are not arguing or trying to convince each person on the team (one by one) that your understanding of the users is correct. You are creating a vision of the users’ worlds and inviting others to enter it. If you do the work well—if the stories are compelling and convincing—not only will your personas be accepted but others will be able to use the information embedded in them to create new products that are useful and usable.