Hello and welcome to our second podcast with AXIS: A Global Feedback Exchange for Trainers, Designers, Developers, and Auditors. Today we are excited to share with you some more information about personas and organizational archetypes. I'm joined here today with some of our co-organizers. So my name is Ashley Fowler and I work at Internews.

I'm also here with Georgia and she's representing Simply Secure, as well as Tiffany and Carrie from Okthanks. And so hello everyone! Okay, awesome. I think we can maybe go ahead and jump right into our topic today and we'll just have a few questions that we'll run through over the next few minutes, but this is really meant to be an introductory conversation. We'll be sharing out some more resources for folks who want to dig deeper into any of these topics. But to start off, let's just start with the basics, so what is a user persona?

Tiffany: Oooh, pick me! So I would describe a user persona as a secure and privacy-preserving way of identifying and understanding different types of people in their behaviors.

Ashley: Excellent, that's a great introductory definition of what a persona is, and I think over the next few minutes we'll explore that a little bit deeper and dive into again, how these are created and what they're used for. I think it's also worth noting in particular reference to this event, we are looking at a lot of at-risk users, and so what does it look like for at-risk communities to create and use these user personas to make sure that their needs and their experiences are still represented in the design and development of open source tools as well as programming and other things. So I kind-of introduced us to a persona which is capturing an individual's needs or wants or challenges, but I think it's also important to note that there are organizational archetypes which look at the organization level. So thinking beyond the individual and thinking about how that individual interacts with their colleagues or with their community. So organizational archetypes build on user personas and often include some of the same information, but again, just with that more community or organization focus. So for example, the archetype might capture the specific types of challenges that people face with an organization, whether that's working on collaborative documents or perhaps using a shared password for a specific account that needs to be shared across multiple people within the organization, archetypes are also really helpful for capturing the specific capacity of an organization, so sometimes it might look at the number of staff within that organization, it might look at the resources, you know, what financial resources do they have at their disposals, and then sometimes even most importantly, do they have any technical expertise within their organization, and do they have anyone that can help them address those security challenges when they do come up?

Again, we'll be digging deeper into each of these, and talking a bit more about what is included in them. But I think the best way to talk about these is to perhaps jump into some examples of user personas and user organizational archetypes, so with that I will... maybe jump over to Georgia, can you tell us a little bit about some of the personas and templates that Simply Secure has developed over the years.

Georgia: Sure, thanks Ashley. Yeah, some examples and we can share the links along with a

podcast that we have look at not just the people would be using a tool, but also thinking about people who introduce a threat or risk to a tool. We have some templates that we've built that allow you to dig into defining who the person is, so giving a little bit so we understand their demographics or things that are specific about their regional or local context, maybe what their role is. We really like to include a quote that captures a person's personality, maybe, or intentions or goal. And we'll talk a little bit about their behaviors, some threats that they might personally experience. And our security-specific template, which I'll include a link for, includes things like their technical expertise from low to high or their needs around public or private information. Yeah, I can share some examples in resources as well, but yeah, hopefully that's a good start, a description of an example persona.

Ashley: Yeah, we'll also share those templates out, I think people will be excited to see the outline of what Simply Secure includes in a persona, and just to again clarify, there are many different types of templates and different organizations and different tool teams like to include different types of information. So in this case, it is very technical-focused, and so that's really useful for developers or others who might be looking at this to gain more information. I'll jump over to our folks at Okthanks and see if you all have anything further to add about personas or templates that you all had to build.

Carrie: Yeah, great, thank you, Ashley. In regards to templates, we have a persona-builder that we have pulled together and this represents, for us, it represents the different types of factors that we typically would include in a persona, it's kind of like a full look at generally things that we consider gathering when we're doing personas, so that's available on our website we'll also link to it in the resources. But the personas we develop vary from project to project really, and it depends on what we're... What stage in the process we're at, and what we need to understand at that given stage so one example that I'll share is... it's been a few years actually since we put these together for our communities in Latin America, but there was a specific problem we were trying to address with a product which was considering the needs of individuals that are using low-end devices and often have poor internet connections and are constantly running out of data. So we're trying to capture from a... From a cultural perspective, I guess you could say, what the means are within that context, and those were a more broad look at individuals and what they're facing and they're behaviors within that environment. So if I'm constantly running out of data, understanding what people do in that case, do they just use it anyway? Do they turn to the radio for music instead? Do... like, what happens? And what observations have our partners on the ground noticed that can help us in our understanding as we build products and tools that help people share files online or offline.

So that's one example of one of the personas sets we've done and happy to share more a little later as we dive into more about how they're used.

Ashley: Awesome, thank you, Carrie. That's super helpful to hear, again, how they're so different yet still resulting in the same output of a user persona. I think from the USABLE perspective, we've taken a slightly different approach. So whereas you all are often working with a particular context or with a specific tool team to really try and dig deeper to a specific community or a specific user base, when it comes to USABLE personas, we haven't really focused on tool specific personas. Instead we've tried to capture some generic profiles that would be applicable across a wide range of tools or a wide range of circumstances. I think it's also worth noting that, we have oftentimes relied

directly on communities, so users themselves, or in some cases, the digital security trainers, or the auditors who are working directly with these communities who already have this intimate knowledge of their users. We've relied on these folks to develop the personas themselves, and then Internews has kind of stepped in to help review and scrub any sensitive information that might need to be redacted before publicizing. But for us, again, it's not really looking at a specific tool or a specific case, but rather thinking more broadly about communities, whether those be LGBTI users or environmental activists, and the specific challenges that they might be facing, again, at a broader level, not necessarily something that is tool specific. So again, this is a quick snapshot of many different ways that, or many different types of personas that exist out there. I spoke before about the archetypes, and so again, this is something that Internews has used organizational archetypes in the past to even better understand the projects that we develop and to better understand the needs of the communities with which we are working.

And so that's something that we can talk a bit more about later in this session as well. But now that we've talked about what exists and the different types of personas that are out there, I think it's interesting to find out a bit more about how these persons are developed and how they're created, so I shared a bit about the usable process, but, Georgia, could you maybe walk us through some other processes that, and ways in which, new personas are developed?

Georgia: Sure, I'd be happy to. Usually when we're working with a team, we will start from understanding the types of things... we use a couple different starting points: one is understanding the types of tasks or workflows are made possible by tool, and I'm trying to go from there to who are they thinking about or expecting to use the technology, what problem is trying to be solved here and who has that problem and who needs to have this tool work for them. So sometimes we go from the technology out to understand that context. And a lot of times we will start from interview data, so talking to lots of people or communities that... And just understanding their needs and then looking for themes and specific contexts and maybe things that might be regionally specific or even role-specific, so what are the things that are important to a journalist versus a researcher versus a human rights organization. They might all end up using a similar technology, but the nuances of their needs may be something we wanna capture in a persona representing each of those different types of people.

Sometimes we'll do that through survey data, survey data can be useful as a way to get a broader range of participants to feed into that information. Yeah, I think those are sort-of the core ways. So interviews and surveys, thinking about it from a task and problem solving perspective and kind of iterating on those tools together, so fill that into themes and context.

Ashley: Awesome, thank you. I'll just jump quickly over to our folks at Okthanks and see if you all have anything additional to add to the process or how these resources are created.

Carrie: Yeah, just, I wanted to build on what Georgia was saying. Geor, you spoke about doing interviews to understand context, to understand different types of people. I will say what we have found is often personas are an outcome of the research done, it's a way of synthesizing the data, it's a way of synthesizing what we've learned so that as we move forward in the process, our design team, as well as our developers have a quick way to say like, "Oh hey, remember, we can't forget about Arlo", which would be one of the persona names that we could possibly use, but it really is...

They're a great tool in synthesizing that research so that we can keep our eye on the ball, if you will, as we move through these often long processes of building technology and building experiences.

Tiffany: Yes, and just to add on to that as well, or bring home the point of how important the personas have been for us within our decision-making process, but also when we're communicating with the developers on the other side of the process. So we've done the research, we've synthesized it into these personas, and then now we're able to have a, in a lot of ways, a more friendly a more approachable way to communicate with our developers about some of the design decisions that we may be wanting to make or that may make the most sense for the community.

Ashley: Awesome, thank you, I'll just quickly follow up on that and see if there's anything else to add about how these resources are used. You all as designers and user researchers, but also what do those conversations look like when you're working specifically with tool teams, what are the questions that they're asking and how are these personas or other resources helping to fill those gaps?

Georgia: Yeah, I can just wanna jump in and say that one of the usual next steps of activities after we've created personas is to think through and create stories that relate to those personas. So how is this person solving this problem and how does the tool fit into it, and therefore what does the tool need to be able to do. And I think that can be really general and applicable to things like training, so if you know that you're trying to solve a specific... You're trying to help people learn how to use a tool to solve a specific problem, it's a similar process. What are the contexts in which they are trying to do this? What problems might they run into, let's say, day-to-day, work- life? And how does this fit in, and how do you build that into the way that you approach teaching? How you build that into the way that you approach support and the way you think about the technologies and how they work.

Ashley: Awesome, thank you Georgia. I think that also brings up the point, that we talked about earlier, of oftentimes these tool teams, many of them are, as we've talked about before, are based in the West, they have pretty limited access to these at-risk users or these at-risk communities, and so despite their best efforts, it's really hard for them to understand the lived experiences and the day-to-day realities of these communities. And so personas give us that opportunity to present those cases and present those experiences in usually a nicely formatted way that looks nice and allows them to feel more in touch with those users who they might not know, or most likely do not know, personally and again, in many cases, would probably put the users at-risk if they were to connect directly, so these personas and these archetypes really serve as an integral intermediary between these two communities, allowing them to communicate, but doing so in a safe and monitored way. I'll jump back over to Okthanks and see if you all have anything else to add around this question of how are personas and archetypes used in kind-of day-to-day life for developers and tool teams.

Carrie: Yes, thank you, Ashley. I would say this is in line also with, Georgia, what you had shared about pulling out a story. Often, we actually use... extract stories from our personas as well, and use them as we measure the effectiveness of our designs, for kind of a lack of better of saying it. Honestly, on a weekly basis, so it just went through and worked through this workflow that we need in one of our apps and as I go back to that and measure how is this doing what it needs to. And we often have this core user story that, for example, a lawyer's running an online training and they

within a group chat with 10 people and it's a sensitive conversation. So the story is often helps me walk through that workflow or helps us walk through that workflow, but then having that tied to a persona then allows us to go deeper and say like, Okay, what else do we need to understand about this story. We know that many of the participants in the group or members of the group may have really low bandwith connections, so what do we need to consider there. But it basically opens up a more broad understanding of context and again, just makes that information super accessible because it's synthesized in that form.

Tiffany: Yes, and with that it also allows us to really to continue to consider people and behaviors and even with threats and challenges that they may be experiencing on a day-to-day basis that we don't. And so just beig able to tie that back to a story, or back to a persona, really helps us just continue to consider and be inclusive in the design process.

Ashley: Awesome, all of this conversation harkens me back to our podcast last week that was really focused on human-centred design, and so I think that's kind of the thread that pulls through all of this is, at the end of the day, we're trying to humanize these users and making sure that the developers aren't just creating some abstract tool that serves maybe their own needs or the needs of their immediate community, but they are thinking about real people who rely on these tools to do their work safely, to communicate with their networks and to maintain and stay connected and make sure that they have access to information, so I think that human element is critical here. Georgia, I'll jump back to you quickly.

Georgia: Yeah, I think the one thing I just wanted to add is a lot of times, especially, and this is true for anyone working on any specific knowledge task, but thinking, talking about a developer for a moment, there are many ways to solve a problem, and a lot of times you need some frameworks or guidance to be able to say, this option is better than this because we need to meet these conditions. So the personas and the stories that we're talking about, the sort-of organizational constraints of an organization archetype, help to give you a framework for making those decisions, right? Even just saying like, Oh, we want an application to be as secure as possible, that can be solved in a number of different ways, and security might mean things in different contexts. It may be really important that data isn't stored locally because theft of a device is a serious risk for a specific set of people, and therefore you don't want that on that device, because that adds risk to people, so where you might have decided, Oh, the most secure solution is to do no internet storage, actually, the opposite might be true, depending on what you need to actually solve for. So I think they're... It's not even just that people don't know, it just helps so, so much to have a guiding framework for making decisions when you're trying to decide which choice or which direction to go in, and a lot of that needs to come back to what need is being solved for whom in what context? And what are the set of challenges we need to take into account?

Ashley: Yes, thank you for highlighting that. It is critical to this process. I think maybe I'll just shift us slightly in a different direction. So we've talked about how designers and developers and tool teams, more-broadly, use personas, but I think it's also important to highlight that personas and the process of creating a persona can be incredibly powerful for end users themselves or for digital security trainers and auditors. So in this case, I'm thinking specifically about during a digital security training, sometimes if you're inviting participants to create this anonymized character or this quote unquote fictional character, it's much easier for them to talk about hypothetical situations.

So let's say that I'm creating a persona and I'm gonna name her Anna, and it's easier for me to say that Anna is maybe using the same password across so three different platforms, whereas in reality, maybe this is me, Ashley, who is using the same password across multiple platforms, but that is embarrassing to admit and could possibly make me look bad in front of my colleagues or my community, so it's much easier for me to talk about very real threats and very real vulnerabilities that exist in our workflows, if we're talking about someone hypothetically. So I think thinking about personas as a tool for threat modeling is really critical.

I think it's also important to consider the implications that personas and archetypes can have for trainers and auditors as well. This really gives you a more in-depth look into the communities and the organizations with which you're working so that you can design and develop your programming, or your trainings, or your digital security interventions to make sure that they're meeting the real needs and the real risks. And as I said before, it is just a very nicely packaged, nicely synthesized collection of information. So I think this has been a super insightful conversation, and I've learned things, even though I've been working with personas for several years now, so I hope that others are taking away from really interesting facts and learning something new from this discussion. I'll just pause and see if there's any closing thoughts from any of our guests here today.

Georgia: I think, the only last thing I would add is, you know, a lot of times we might say, Oh, I know who I'm doing this for, I remember or I'm definitely thinking about this person.

I think also coming back to the framework can be really useful to be like, Oh, I forgot to write down this or I forgot this detail point, so even for as we are experts in our own areas, that sometimes allows us to forget details because we're so used to doing the activity so I think it's really useful, even if you think you know or you feel really comfortable with what you're doing, I think it's really good to circle back to it as, again, an accountability framework of: Are we actually keeping track of all of the pieces of information case that we want to? Are we addressing all the issues? Are we definitely helping the people that we are aiming to help. So yeah, even for everybody who's been doing it for a long time, it's helpful to come back to that framework.

Ashley: Yes, it's always good to continue the education and revisit and make sure that things are still aligning with our original goals and intentions. So hopefully again, this was valuable for everyone. We also will be next week exploring how we create these personas and archetypes ourselves, so we'll, as Georgia said earlier, be sharing links to some of these examples that we've referenced on this podcast, so please do explore these a bit further, look at these examples, think about what you would include in a persona that was representing either yourself or your communities. And we'll look forward to creating some of these together next week. Thank you all for joining and we'll be in touch soon!

Thank you!