

The Scottish AI Playbook Personas Workshop Report

The Workshop

A 90 minute workshop was held on 5th August 2021 online with 30 participants. The participants were mixed from members of the public, to senior leaders, to members of the Scottish AI Alliance.

After some scene setting on the what why and how the participants defined 6 users, these will probably not be the final set, but act as a base to start building on. This was done through a discussion with the group.

After 6 had been chosen the participants were split into 6 teams where they started a proto persona looking at name, role, relevant demographic, quote and a description of a possible image.

Persona Template

What do they look like? 	What is this person's background?	What are their challenges?
Name	Why are they coming to this service?	What do they need from this service?
Role	What are their objectives from this service?	What would this person say about this service? “ ”
Personality		

On returning 2 were highlighted and talked through as examples, the teams did a good job of shaping the personas in a short amount of time, some interesting ideas came through in the personality segments especially Eg *“Analytical, inquisitive, critical; professional integrity; social conscience; eco-/ethical living aware” Anna the Academic Researcher*

The next section looked at motivations & behaviours, what were the users motivation to use the AI Playbook, what was their user goal, motivating and inhibiting factor and what may trigger them to use the AI Playbook?

Using Anna above again as an example her inhibiting factor was interesting *“Inhibiting Factors: difficulty to address ethical issues in her project due to lack of AI expertise; might be concerned about vague principles that are not practical in guidelines”* would give the design team something to think about with the pathways and overall design.

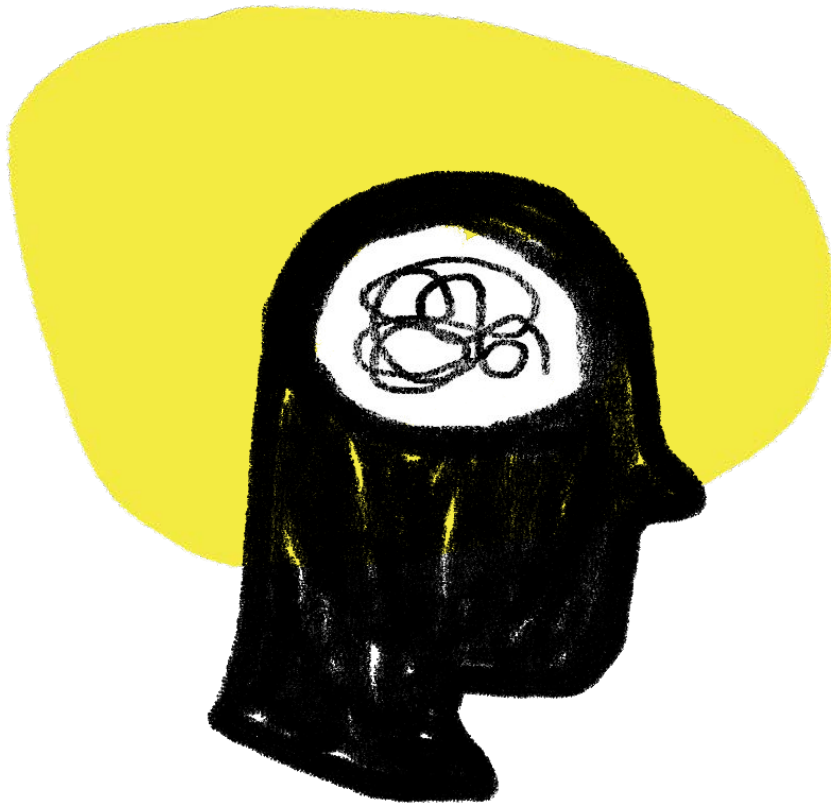
Stevie the student in team 4 also had an interesting trigger to use the AI playbook, a surge in use at graduation time would be interesting to explore *“Trigger - Graduating and looking for the next step Expectation from future employers”*

The session wrapped with thank yous and next steps, members of the public expressed a positive interest in what next with the AI Playbook design.

Introduction and further reading on personas

Personas are archetypal users who embody the goals and aspirations of real users in an easy-to-assimilate and personable form. Personas were first developed as a tool to support the development of software (Cooper, 1999). Cooper (1999) recognised that software developers often had a poor understanding of the intended users for their products and would make design decisions based on unfounded assumptions about people's preferences and skills or would revert to making decisions based on people like themselves. He proposed the use of persona characters to improve team communications and to provide a consistent reference point for design activities. Personas are now used widely within many sectors of the design industry, particularly in relation to the design of user experiences for digital products and services (e.g. McKay, 2013; Mulder & Yaar, 2006). Personas can be assumption-based and such 'ad hoc' personas can be effective early in a project to articulate what is already known or being inferred about users (Adlin & Pruitt, 2010). However personas are generally accepted to be only as good as the data on which they are built and should therefore be based wherever possible on robust qualitative research

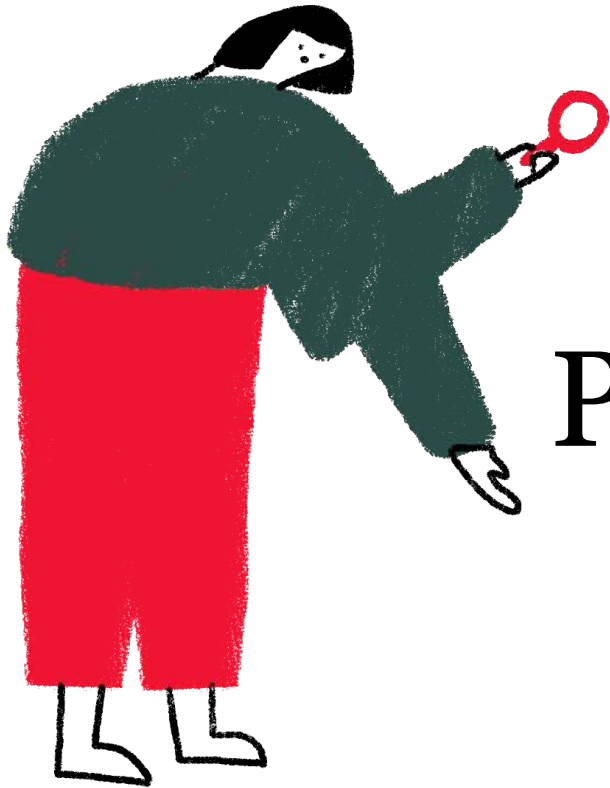




Pruitt & Adlin highlight three particular benefits related to using personas. Firstly, personas make any assumptions being held by the design team explicit and therefore help build a shared understanding of who is being designed for. Secondly, personas support decision-making by providing a small number of specific users to design for. Although focusing the design of a product or service to meet the needs of a narrow group of users can sound dangerously limiting, designing for a few well-defined personas provides meaningful constraints and boundaries to the problem space and therefore is likely to improve the quality of design decisions. Finally, as personas contain personal and believable characteristics, they are more engaging than other representations of user data. A well-defined persona will therefore encourage empathy towards users and engage the interest of stakeholders.

(Cooper, 1999). The study presented in this paper attempts to provide this robust underpinning to the resulting personas in the context of domestic renovation.
Cooper, A. (1999). *The inmates are running the asylum*. Indianapolis: Macmillan Computer Publishing.
McKay, E. (2013). *UI is communication: How to design intuitive, user centered interfaces by focusing on effective communication*. San Francisco, CA: Morgan Kaufmann Publishers.
Mulder, S., & Yaar, Z. (2006). *The user is always right: A practical guide to creating and using personas for the web (Voices That Matter)*. Berkeley, CA: New Riders.
Adlin, T., & Pruitt, J. (2010). *The essential persona lifecycle: Your guide to building and using personas*. San Francisco, CA: Morgan Kaufmann Publishers.

The Proto Personas



Proto Persona

1

Thinking

“Is this the right country for my startup? What support is available?
What are the legislative requirements? Where’s my audience based? Where’s the talent?”



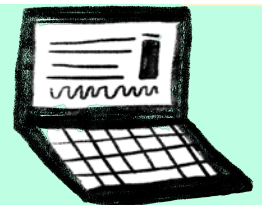
Feeling

“I’m worried about doing the wrong thing. How can I find the right guidance and support?
I’m excited about the prospect of making a difference to my community, too!”



Doing

PLANNING ALL THE THINGS. Researching, connecting, finding community,
Contacting mentors/potential partners & employees/seeking support organizations
Building a team, finding data governance...looking for the ‘unknown unknowns’



Team 1 User base

Entrepreneurs Startups

User Name - Jude

Role - More experienced founder

Quote

“With my knowledge of the working world, I’m now compelled to build better tools to solve society’s pressing problems.” (replace with real quote)

Age - mid 40s - has already had a career

Digital Skills - background in software engineering, not a data scientist

Personality - driven, practical, knowledgeable, commitment to integrity

User Goal

Build effective solutions to meaningful problems--without the overhead of slow, traditional working structures.

Motivating Factors

Make efficient, effective, ethical change, driven by knowledge of problem domain

Inhibiting Factors

Risk aversion, “what if I make it worse/mess it up?”, domain knowledge risk (eg governance) is scary - playbook could help

Possible Triggers

Just cannot take anymore. Life stability; things are settled; can now take risk; improved confidence of being more experienced

Proto Persona

2

Team 2 User Base
Academic Researcher

User Name: Anna

Role Academic Researcher (social scientist designing a health data research project to understand delayed discharge in hospitals)

We shouldn't use AI unless we're sure it can actually improve and save lives - if it's only going to make big tech companies lots of money I'd be very concerned.

NB - we also thought some of the personas should be less "benevolent" or even evil

Demographics that matter
(Delete as you feel right)

Age: 35
Digital Skills: fluent in general digital technologies
Education: PhD
Marital Status:

Personality
Analytical, inquisitive, critical; professional integrity; social conscience; eco-/ethical living aware

Image "European" - not necessarily Scottish, maybe relatively neutral ethnically/dark hair
In an urban outdoor environment (maybe a bit of green); "trendy" style but informal

Motivation Find guidance and information on resources to inform her work (ultimate goal is use AI for good); but still ensure creativity for the research team is uninhibited

Motivating Factors - conduct high-quality ethical research, deep commitment to do the right thing

Inhibiting Factors: difficulty to address ethical issues in her project due to lack of AI expertise; might be concerned about vague principles that are not practical in guidelines

Possible Triggers: she has been hired to do project, and is looking for support and guidance; or might be seeing critical reports about other projects in the press

Proto Persona

3

Team 3 Base AI gatekeeper /
policy maker

Name
Leslie

Role
AI Policy Maker

“I need clear guidance and
tangible outcomes for our
stakeholders

Need to have clear parameters
to inform policy”

Demographics that matter
(Delete as you feel right)

Age: 30 - early career
Digital Skills - Competent
in most user tech
Education - Arts Graduate
with PG

Personality - conservative
in nature and very
measured in judgement
and decision making

User Goal Understand AI and the
Principles of its ethical use across
stakeholders

Motivating Factor Influencing
outcomes and government
priorities. Ensuring AI is adopted
ethically, inclusively and correctly.
Building trust in AI across key
groups

Inhibiting factors
Trust, pushing the boundaries and
appetite for risk, cultural and
technological influences,

Possible Triggers
Need to develop policy based on
government priorities or the need
to develop policy within
organisational context due to AI
adoption

Proto Persona

4

Team 4

User Name

Stevie

Role

Student

“I want to do games design and I want to build better AI opponents”

Demographics that matter
(Delete as you feel right)

Age: Final year undergraduate (age 21)

Digital Skills and education: Computer Science degree, programming, web app skills, privacy and ethics module

Personality:

User Goal

Giving themselves a competitive edge
Going above and beyond to stand out at interviews

Motivating Factor - Getting a job after graduating

Aligning with their values
e.g Ethical AI

Inhibiting factors

Accessibility Awareness

Possible Triggers

Graduating and looking for the next step
Expectation from future employers
Supporting current assessments

Proto Persona

5

Team 5 -Fill in your User

Thinking

How will students learn skills?
How to keep up with the constantly changing tech landscape



Feeling

Excited to be teaching AI to students



Doing

Using AI to teach AI!



Team 5 - Educator

User Name

Ashley

Role

Established college lecturer

Quote

“I believe that AI is a key part of our future and I want my students to be able to access all the opportunities available”

Demographics that matter

Age: 45

Digital Skills: Tech savvy, STEM champion

Personality:

Does not teach AI but wants to encourage students to embark on AI related career paths and take on AI related opportunities. Wants to learn herself. Believes in the potential of AI .

User Goal. To inspire students to explore potential AI influence in everything they do - explore cross disciplinary opportunities

Motivating Factors

Plugging gaps in AI industry. Fear of being left behind.

Inhibiting Factors

Don't know where to look, no central info hub

Possible Triggers

daunting size of challenge.



Ai Created Image

Proto
Persona
6

Team 6

Name Archie

Product Owner - FinTech

I'm passionate about the application of AI, but want to do my job responsibly

I'm passionate about football, and I want to use my AI skills to help predict the league outcome

Demographics that matter
(Delete as you feel right)

Career stage - 5 years post graduation
Digital Skills - programming, ML, membership of BCS
Education - Masters degree

Personality - analytical, ambitious, self-serving

User Goal

To ensure the product that he owns complies with principals/regulations/procedures in the playbook

Motivating Factors generates good publicity for the company, avoid any legal challenges, avoid any bad press, playbook sets benchmark

Inhibiting Factors

Extra work involved, complacency

Possible Triggers Company policy, seeing competitors 'mauled' because playbook has not been followed!

Next Steps & observations

Next Steps

The smaller team look at the set of personas and decide who are the priority users, who are the target audience. Cut any from the first round of Proto Personas that you feel are not relevant, add in the new ones. There is not a set number but it would be good to keep the amount manageable with 6-8 personas in total.

How might these people differ in terms of their:

Motivations for using the playbook?

Their attitudes towards AI?

Their information needs - task goals / user needs

How they might interact with the playbook?

What are they thinking, feeling, doing when interacting with the AI playbook or approaching using it.

We suggest doing some 1-1 interviews to explore the different personas.

You can gather “real life” quotes from the interviews to add depth to the personas and edit them to reflect the reality rather than the assumptions some were based on.

Once you have a set of persona you are happy with stand back and look at them as a whole, Are there overlaps?

Are there any that are not needed?

Have the concerns or opportunities that arose in the initial research groups been covered?

Again revisit and edit accordingly.

When you are content with them as a set, create some Persona Scenarios (see Pg 24) these communicate how a person uses / or will use a product to achieve a goal and are often used in conjunction with personas.

They help bridge from the ‘world as it is now’ to the world ‘as it might become.’

The process is iterative and you need to keep going back to them until they feel real, well rounded and representative build on the data research you have to make them robust.



Once collated share widely with the team, make sure you keep going back to them as guides. They should be a constant through the design process. Like team members.

Items to think about from the initial 3 research groups. They voiced a need for...

The Playbook to be accessible & inclusive

At the moment all the personas appear to have full accessibility and no obvious areas they may be excluded. We suggest adding either an access need within several of the personas.

“Accessible design is good design – it benefits people who don’t have disabilities as well as people who do. Accessibility is all about removing barriers and providing the benefits of technology for everyone.”

Steve Ballmer Microsoft

[This is a link to GDS](#) persona examples.

The GDS Accessibility team has created 7 different accessibility personas. Each persona has different access needs.

For Example [Claudia](#) – a sight impaired screen magnifier user. These are good to look at for inspiration

This also responds to the research groups want to “Make the Playbook clear, accessible to all (public) without buzzwords and jargon “

Trust & Transparency

There was a large response in the research groups on this, you could consider a persona that may use the AI playbook in untrustworthy fashion. [Shannon Vallor mentions this in the Ethics Toolkit, Tool 6.](#) Or equally someone who values trust & transparency, a lack of this would inhibit their use of the playbook.

Climate change

Climate change was brought up in the student workshop. This does appear lightly with Anna but could be seeded into other personalities with different perspectives added.

An Ethical approach

Team 4 Student Stevie has the start of ethical interest that could be grown
Team 2 Anna an Academic Researcher had a good Eco and ethical stance, helps bring in planet centred design lense

Observations from the chat

It was recommended that some industry personas like “technical practitioner” “non Technical decision Maker” could be involved.

This persona could be added to the set.

SME & Early Stage businesses Vs large enterprises could be added.

The education specialisms may have reflected the people in the room. Could one of the education areas be replaced? (however the Academic/educator and student do give different points of view)

The sceptic was agreed to not be a persona, but it should be subtly written into a persona, echoing team 2, make sure not all the personas are benevolent.



User Scenarios

Scenarios

Scenarios are structured evidence based stories that take understanding of users into the design process in a structured form.

Scenarios communicate how a person uses / or will use a product to achieve a goal and are often used in conjunction with personas.

Help bridge from the 'world as it is now' to the world 'as it might become.'

Scenarios break stories into manageable chunks and can be linked together to communicate how a user experience unfolds over time.



A good context scenario will...

Be believable.

Be grounded in user research.

Stand on its own without further explanation.

Communicate a **believable character**, the **goal** or **outcome** that is being met and bring the **context of use** to life.

Focus on communicating the desired experience not detailed interactions.



A good scenario

Fred grabs his phone. He opens the beer-finding app, and locates a beer nearby. He chooses to have it delivered, enters his payment information, and completes his order.

A not so good scenario

Fred grabs his phone. He taps the beer-finding app. He taps the zip code input box, and the onscreen keyboard appears. He taps the numbers for his zipcode, and then taps “find beer.” An hourglass appears on his screen, and after several seconds, search results begin showing up.



The narrative story arc...

We combine scenarios into narrative stories to communicate the user's journey towards meeting their goal.

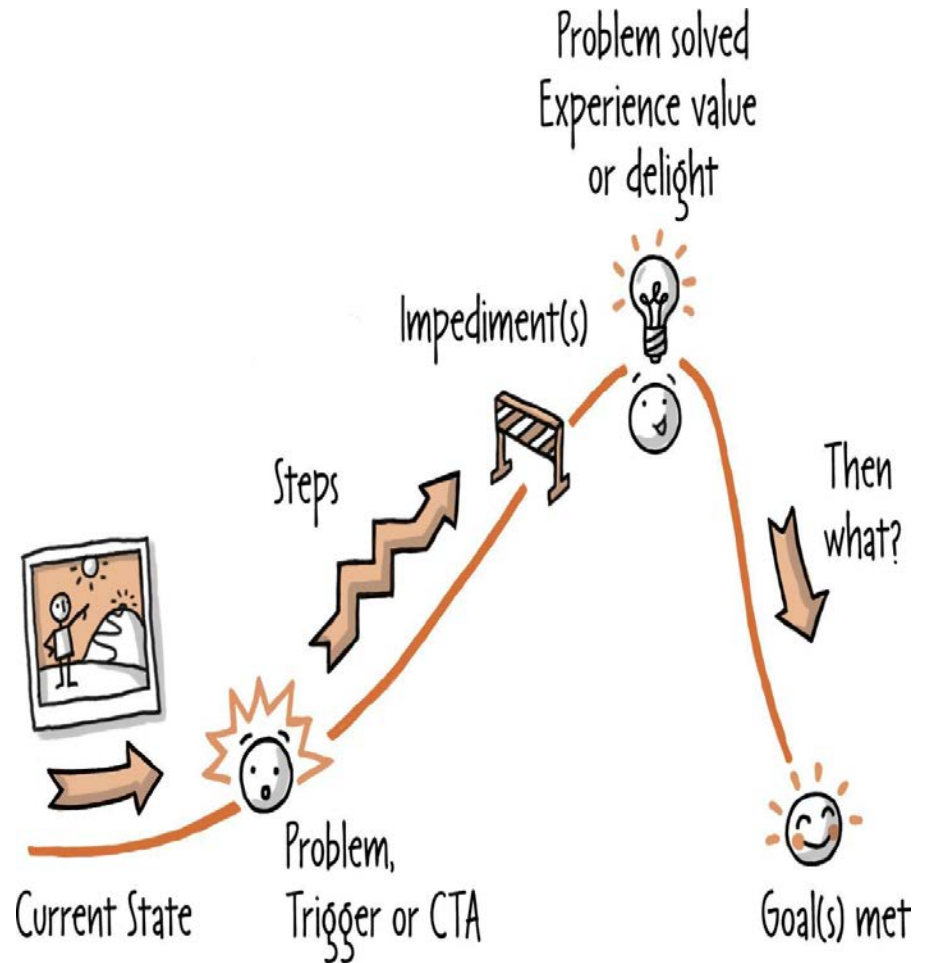
These stories often follow the 'narrative story arc':

Setting - sets the scene - the current state of things.

Inciting incident (call to action or trigger) - a problem is described.

Steps - the character moves through a series of steps or stages towards their goal.

Goal - they achieve their goal or outcome.



snook



Thankyou
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