

# Personas for Stakeholders in IT RFPs

## Goal:

- Represent Key stakeholders in general sketches based on data / interviews / prior knowledge
- Fill in their motivations and how we can best help them by improving the UX of RFPs

## Created by

- User Experience in RFPs working group, 2014
- DigitalGov User Experience Program

# Paul the Program Manager

Agency: NOAA

“I need this website to rock”



## Attributes

- He is passionate about his program and wants to see it succeed.
- He has an iPhone and uses social media and wants his government website to work as easily.

## Goals

- To hire a contractor who can put together an easy-to-use website that will increase efficiency and make data easy to find and manipulate.

## We must

- Ensure requirements are clear, concise, and representative of the actual needs.
- Check in frequently to give status updates and help with procurement questions

## We must not

- Overcomplicate the procurement process.
- Award contracts without seeing capability of vendors beforehand.

# Cory the Customer

Location: Buffalo, New York

“If this works, I’ll use it.  
If not, there’s Google”



## Attributes

- 28, unmarried, works in the banking industry and loves sports
- Has an iPhone, and iPad, a MacBook, and Apple TV; a regular Apple die-hard
- Is active on Twitter and Facebook, dabbles in Instagram, has a gmail account and is generally tech savvy.

## Goals

- Accomplish his task on mobile, because he’s always on the go
- Navigate the UI with ease
- Complete the task within 25 seconds of decision to pursue it

## We must

- Reach him via mobile, which means iOS compatibility
- Make the design simple and straightforward
- Avoid clutter so tasks can be accomplished quickly

## We must not

- Include long pieces of text
- Make an unfriendly mobile version
- Make an Android-optimized product
- Include pop-ups that interfere with the UI

# Celia the IT Contractor

Location: Dulles corridor, VA; also works onsite with the client and at home

“I need clear requirements and instructions”



## Attributes

- *Single mom, 31, with one daughter*
- *Is project manager on contractor side*
- *Tech savvy--works on PC and Mac platforms*
- *Has two mobile phones: one iPhone, one Android; iPad mini; social media=life*
- *Frustrated by previous contracts*
- *English is not her first language*

## Goals

- *Successfully deliver a gorgeous, cutting-edge, usable, accessible website to the client--using Agile method*
- *Have clear communications with the client*



## We must

- *Provide clear, understandable RFP & SOW*
- *Be available for daily scrums*
- *Ensure that all requirements are in plain language*
- *Use Facetime, Google hangouts, etc.--along with conference calls*



## We must not

- *Overcomplicate procurement*
- *Keep changing requirements*
- *Make her read long, unclear requirements*
- *Waste her time--schedule is important*

# Chris the Contracting Officer Representative (COR)

Location: Washington, DC

XXXXXX



## Attributes

- *50, married, 2 kids. 10 years gov service*
- *A good writer, fairly good with tech*
- *Understands program well, but a contracting novice (only part-time)*
- *Feels alone when putting together RFPs*

## Goals

- *Be liaison between CO and Contractor*
- *Write clear SOW and other docs*
- *Keep contract on track*
- *Find the best proposals*

## We must

- *Give them examples of great RFPs*
- *Write everything in Plain Language*
- *Explain the COR and CO role regarding RFPs (?)*
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## We must not

- *XXXXXX*
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# Paulette the Proposal Reviewer

NOAA:

“Help! Not sure what I’m supposed to do”



## Attributes

- *55, in government for 5 years*
- *Manager, communicator. English major*
- *Proactive, energetic.*
- *Speaks English and Spanish*
- *Uses a PC at home + work, older iphone*
- *Is bewildered by tech speak at meetings*

## Goals

- *Attend initial planning meetings for product*
- *Evaluate proposals*
- *Ensure a good product is created*
- *Understand IT terms*

## We must

- *Help her understand IT terms so she can successively evaluate product*
- *Give her time to learn it*
- *Give her list of questions to ask at Proposal meeting so she can understand the User Experience*
- *Help her understand timeframes for deliverables from CO and others,*
- *Help her understand all roles and the process*

## We must not

- *Make her go to these meetings without proper background*

# Cindy the Contracting Officer

Agency: NOAA

“I get a sense of pride from meeting the agency mission”



## Attributes

- Four-year degree in business management and CO-certified
- Overworked- only a dozen COs for hundreds of contracts
- Frustrated by lack of innovation and strategic thinking
- Frustrated by the lack of timely consideration in the purchasing process

## Goals



- Market Research - Finding out what new products are available
- Meeting the agency needs - reduce rework, save money, inspires innovation

## We must

- Understand her role (save us money, prevent rework, keep us out of jail)
- Do all market research first (SOW, estimates, schedules)
- Define requirements clearly
- Contact her early if she is available
- See her as a partner (even if she's busy) and show value in her input



## We must not

- Require her to do our job
- Wait too long to involve her
- Treat her like a “check-out girl”