

HOW-TO GUIDE

Personas Guide

MANAGEMENT PORTAL

Design who learners practice with. Give an AI participant a role, a point of view, and a response style that support your learning goal.

For professors, managers, and independent learners.

1. Decide who is in the conversation

A Persona is a reusable participant template with a name, appearance, voice, and optional behavior details. The scenario determines the available roles and participant positions.

Persona Defines an individual's identity, background, goals, and response style.

Scenario Modifier Adds session-level behavior, pressure, constraints, or role-play context.

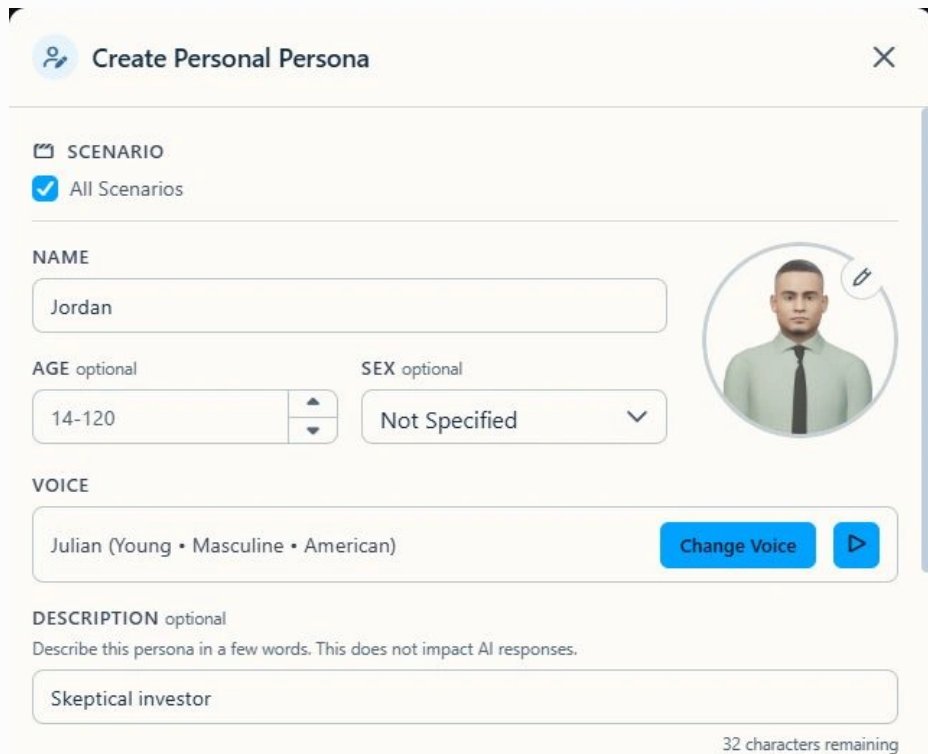
Custom Factor Defines what to evaluate after practice, not how the participant should respond.

Knowledge Pack Supplies searchable reference material for grounded practice.

Start with the learner's task. One clear role is often more useful than a long biography. Use fictional names and cases unless you have permission to use real information.

2. Set identity, appearance, and voice

1. Open [Personas in the Management Portal](#) under Collections. Select Create Persona.
2. Choose applicable scenarios, or select All Scenarios. This controls library availability, not automatic placement in a session.
3. Enter a Name, up to 50 characters. Age and Sex are optional; use them when relevant to the practice context.
4. Select the avatar preview to change appearance. Use Change Voice to choose a voice and preview it when needed.
5. Add an optional Description, up to 50 characters, to help identify the template. Description does not control AI responses.



The screenshot shows the 'Create Personal Persona' form. At the top, there's a title bar with a person icon and a close button. Below the title, the 'SCENARIO' section has a checked box for 'All Scenarios'. The 'NAME' section has a text input field containing 'Jordan'. To the right of the name field is a circular avatar preview of a man in a green shirt and tie, with an edit icon. Below the name field, there are two optional fields: 'AGE' with a dropdown set to '14-120' and 'SEX' with a dropdown set to 'Not Specified'. The 'VOICE' section has a text input field containing 'Julian (Young • Masculine • American)' and a blue 'Change Voice' button next to a play button icon. The 'DESCRIPTION' section is optional, with a text input field containing 'Skeptical investor' and a note that the description does not impact AI responses. At the bottom right of the description field, it says '32 characters remaining'.

Create Personal Persona

SCENARIO

☒ All Scenarios

NAME

Jordan

AGE optional

14-120

SEX optional

Not Specified

VOICE

Julian (Young • Masculine • American)

Change Voice

DESCRIPTION optional

Describe this persona in a few words. This does not impact AI responses.

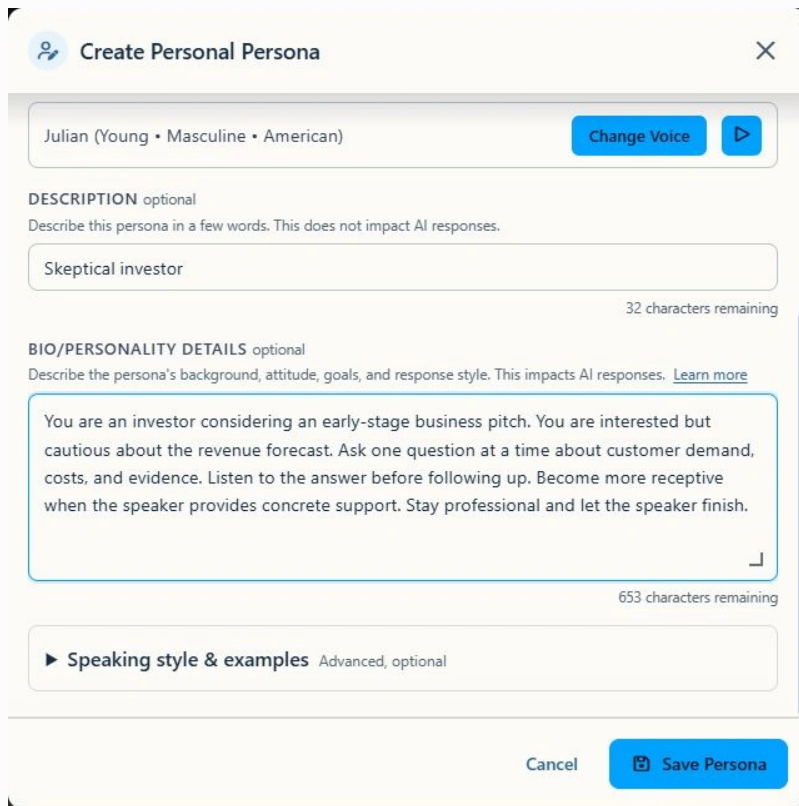
Skeptical investor

32 characters remaining

Identity and presentation settings. The behavior instructions are farther down the form.

3. Write the behavior, then save

1. In Bio/Personality Details, describe the role, background, attitude, goals, and response style. This field influences responses and allows up to 1,000 characters.
2. State how the participant should react to the learner and what would make them more receptive, concerned, or convinced.
3. Keep the instruction consistent with the scenario. Do not ask the participant to know private facts or recite a fixed script.
4. If needed, expand Speaking style & examples. These optional advanced fields guide delivery and phrasing. Review AI-generated suggestions before using them.
5. Select Save Persona and confirm the template appears in your library.



The screenshot shows the 'Create Personal Persona' form. At the top, there's a header with a person icon and the title 'Create Personal Persona', and a close button (X). Below the header, there's a section for the persona's name and voice: 'Julian (Young • Masculine • American)' with a 'Change Voice' button and a play button. The next section is 'DESCRIPTION optional', with a subtext 'Describe this persona in a few words. This does not impact AI responses.' The input field contains 'Skeptical investor' and shows '32 characters remaining'. The following section is 'BIO/PERSONALITY DETAILS optional', with a subtext 'Describe the persona's background, attitude, goals, and response style. This impacts AI responses. [Learn more](#)'. The input field contains a detailed description of an investor and shows '653 characters remaining'. At the bottom, there's a section for 'Speaking style & examples' labeled 'Advanced, optional'. The form has 'Cancel' and 'Save Persona' buttons at the bottom right.

Create Personal Persona

Julian (Young • Masculine • American) [Change Voice](#)

DESCRIPTION optional
Describe this persona in a few words. This does not impact AI responses.

Skeptical investor 32 characters remaining

BIO/PERSONALITY DETAILS optional
Describe the persona's background, attitude, goals, and response style. This impacts AI responses. [Learn more](#)

You are an investor considering an early-stage business pitch. You are interested but cautious about the revenue forecast. Ask one question at a time about customer demand, costs, and evidence. Listen to the answer before following up. Become more receptive when the speaker provides concrete support. Stay professional and let the speaker finish. 653 characters remaining

► Speaking style & examples Advanced, optional

Cancel [Save Persona](#)

Description is a library summary. Bio/Personality Details defines behavior. This is an unsaved example.

Example: a skeptical investor

Name: Jordan. Description: Skeptical investor. Adapt this Bio/Personality Details example to your scenario.

You are an investor considering an early-stage business pitch. You are interested but cautious about the revenue forecast. Ask one question at a time about customer demand, costs, and evidence. Listen to the answer before following up. Become more receptive when the speaker provides concrete support. Stay professional and let the speaker finish.

Give the participant a reason for skepticism and a path toward changing their view. "Be difficult" alone does not define a useful practice challenge.

4. Select the Persona for practice

1. In a supported scenario's setup, open the Persona selection and choose a participant for the available role or position. Controls differ across the Web App, VR App, and Desktop App.
2. For assignments, open Choose Personas. Use Import from Collection for a saved template or Create New to configure a participant.
3. Review participant positions and venue seating when available. Scenarios do not all support the same number or type of participants.
4. Use Hide Persona Bios in the assignment when learners should discover the personality during practice.

Choose Personas

[Create with AI](#)

Customize the name, age, sex, and bio/personality of your conversation partner.

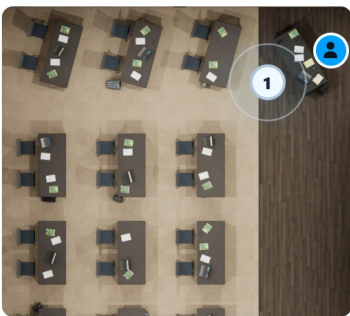
Hide Persona Bios

Hides bio information from assigned members so they can't see how personas were instructed to behave.



VENUE SEATING

Location: Behind the Desk



PERSONA

Customize the Persona of your Conversation Partner



Conversation Partner

[Create New](#)[Import from Collection](#)[Random](#)

Assignment configuration determines who learners encounter. Saving a template alone does not apply it.

5. Share appropriately and test

- Personal templates belong to your library. Organization templates are shared; authoring depends on permissions and organization settings.
- Complete a short practice or assignment Test Run before learners use the configuration.
- Check that the participant stays in role, asks useful questions, and changes tone for the intended reasons.
- If behavior is wrong, revise Bio/Personality Details, not just Description. Check for conflicting Modifiers.
- If a template is missing, check its scenario availability, library source, permissions, and the participant roles the scenario supports.
- Recheck an assignment after editing a library template. Do not assume it automatically adopts every library change.

Name, avatar, and demographic fields do not replace behavioral guidance. Avoid stereotypes; describe the individual's motivations and conversational behavior instead.

Continue learning

[Scenario Modifiers and prompt template](#)

[Custom Factors](#)

[Understand Knowledge Packs](#)

[Assignment Quick Start Guide: Management Portal](#)