



<Persona role>

<Fictional name>, <industry, years experience>

"<Meaningful quote>"

Domain expertise: ●●●●●●●●●●●●

Tech savviness: ●●●●●●●●●●●●

Openness to change: ●●●●●●●●●●●●

Amount of travel: ●●●●●●●●●●●●

Business goals:

1. <What are the top 2-5 business goals/objectives for the persona? What are their expected business outcomes? These should reflect what they want to achieve, who they serve, what their values are, and how they want to feel. They should be in order of importance.>

Device usage:

• <What devices does the persona use the most to do their work (e.g., desktop, laptop, phone, tablet)? >

Primary tools and software:

• <What tools/programs do they use most often?>

Value proposition: <Summarize why this person is valuable to the organization and its end-customer/patients. Why is this person vital to the company to keep the it running? You may include a high-level summary of how they achieve this. The value proposition should align with the top goals.>

Typical day:

• <What does a typical day for this persona look like? What are the key high-level tasks they need to complete? Who do they work with the most often (colleagues, customers, patients, vendors, etc.)? What behaviors impact the way they approach their goals?>

Ideal experience:

• <What does the persona want to do with technology to be productive? What does the persona need from technology to perform their job efficiently? These should tie back to the goals.>

Pain points:

• <What are the persona's challenges? What are the roadblocks that keep them from achieving their goals? What are the obstacles in their way?>



Revenue manager

Kelli, Hospitality, 10 years of experience

"Making sure the price is right."



Goals:

1. Optimize financial results by anticipating demand and forecasting revenue adjustments
2. Regular monitoring of inventory to generate daily, weekly, monthly reports to her team and key partners
3. Build and maintain strong working relationships with team

Device usage:

- In-office desktop, smartphone
- Brings laptop and smartphone everywhere if she's not at her office

Primary tools and software:

- EzRMS
- HMS
- MS Office

Value proposition: Kelli is responsible for setting prices of multiple midscale hotels to maximize hotel's profitability and meet their strategic goals. Because she's the one revenue manager of her company, she's the in-house expert of the technology used and serves as the main contact between the hotel and online travel agencies. She leads the critical financial processes and has oversight of all aspects relating to revenue accounting. She partners with marketing team, sales staff, financial specialists, and external vendors to optimize revenue and increase the commercial capabilities of the hotels in both the high and low seasons, depending on the complexity of the market and services provided, and adjusts strategies accordingly.

Typical day:

- Kelli checks her emails and starts to pull reports of the previous business day's financial performance/trends
- She prepares a report with relevant past data/KPIs and projections to send to management and team
- Throughout the day, she monitors the performance of different distribution channels (e.g. direct bookings and online travel agencies) to determine which are performing best/evaluate ROI
- After compiling this information, she meets with the sales and marketing staff and financial specialists to discuss strategies to achieve peak financial performance

Ideal experience:

- A system that helps with strategic management rather than tactical management
- Automate the repetitive tasks (e.g. pricing and reporting)
- Accuracy of system's algorithm and insights (e.g. outlook, price recommendations, current business trends)
- Ability to customize system generated reports
- Seamless communication/reporting process to maximize efficiency
- Maintain external relationships (e.g. tourism operating partners) while also closing out wholesale allotment/availability

Pain points:

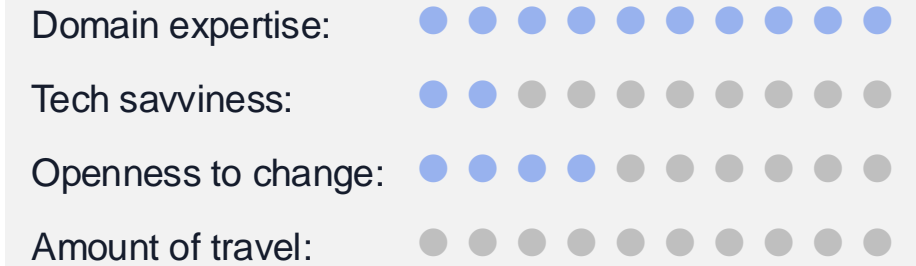
- Manually importing data into spreadsheets is time consuming
- Overload of data
- Importing/exporting large data files leads to slower load times
- Not enough data as rate decisions should be based on more than forecasted occupancy
- Fake websites that offer "better" deals and deceive potential travelers



Nurse manager

Maria, Healthcare, 21 years of experience

"I am the front-line for everything."



Goals:

1. Ensuring the highest quality of patient care
2. Keeping my team of nurses motivated and happy
3. Support the success of my organization

Device usage:

- Laptop to manage HR-related tasks for team, check inventory level of supplies
- In-room computer terminal to look at patient records and inventory
- Phone for scheduling and emergency alerts on the go

Primary tools and software:

- MS Office
- EHRs
- WFM
- HCM
- SCM
- Knowledge bases

Value proposition: Maria strives to create a safe and positive environment for the nurses on her team provide safe and effective care that exceeds their patients' needs. She leads the care efforts for her team, providing clinical expertise and advice, and oversees the unit's operations, making sure for smooth shift transitions and top-notch patient care. Having been a nurse herself, she also coaches the nurses on her team on their career and help them find satisfaction in their work. On top of managing the team, Maria monitors the status of her unit's patients, stays abreast of recalls and alerts, ensures supplies are well-stocked, and explores what additional care can be provided to improve patient outcomes.

Typical day:

- Maria clocks in and starts her day by checking and addressing her 25-person team's schedule, time-off requests, emergencies, recalls, and other issues
- She then starts her rounds to oversee her team of nurses as they care for patients – providing guidance or stepping in when needed
- She executes physician orders (tests, medical changes or discharge) and writes up notes as needed
- Between patients, Maria walks over to the supply room to check inventory
- Before signing off, Maria check the schedules for the next shift to ensure coverage for the coming days

Ideal experience:

- Ability to make patient care, personnel, scheduling, and budget decisions quickly for my dept.
- Stay up-to-date with recalls from the National Recall Alert Center
- Accomplish as many tasks as possible on-the-go
- Get notified when supplies need to be ordered (predicted)
- Quick approval of requested time-offs and expenses
- Ensure staff has training and resources to do their jobs
- Stay up to date with new drugs/intervention plans

Pain points:

- Days are unpredictable
- Staff turnover and burnout
- Difficult to know team satisfaction
- Complexity of contingent and traveling nurses
- Too much time planning schedules and reconciling time/pay disputes
- Lengthy process to order supplies
- Too much information in systems to do what I need
- Inconsistent functionality and experience across multiple systems and devices
- Justifying financial decisions to leadership without accurate reports/data



Inventory specialist

James, Distribution, 4 years of experience

“Strategically navigating supply chain disruptions as we increase production.”



Goals:

1. Maintain accurate inventory records
2. Ensure all orders are delivered and received correctly
3. Reconcile invoices and adjusting inventory levels to ensure that they accurately reflect all inventory transactions
4. Track the movement of inventory through the distribution process (e.g. scanning barcodes, inputting information to the system)

Device usage:

- In-office computer
- Handheld device/barcode scanner

Primary tools and software:

- Email
- WFM
- FSM
- SCM

Value Proposition: James helps to ensure optimal inventory levels and support demand planning to avoid inventory waste and shortages, especially with the rise of supply chain disruptions. He oversees the ordering, storing, receiving and distribution processes of his organization’s products and supplies. He controls the flow of the supplies and equipment, track and analyze inventory maintenance, and help develop protocols for loss mitigation. On a monthly basis, he’ll provide reports on inventory levels to help management in making strategic decisions about inventory management.

Typical day:

- James starts off his day checking in with his team and purchasing/inventory control manager
- James identifies any inventory issues or errors that need to be addressed immediately
- Throughout the day he’ll be responsible for accepting up to 10 or 12 deliveries and put them away
- He prepares finished goods for shipping, and conduct the shipping transaction
- Every month, he is asked to provide a report on inventory levels to help management teams with their inventory management strategies

Ideal experience:

- Dashboards with relevant data, KPIs and metrics (Inventory turn rates, spend velocity, monthly inventory valuation, inventory fill/kill rate, etc.) that are actionable, customizable, and easy to comprehend.
- Predictive analytics and notification when supplies are at risk of stock-out or overstock.
- Minimal to no lag times when inventory/stock is updating in the system
- Seamless mobile/handheld capabilities so that I can quickly scan and store purchases received
- Streamline buyer, supplier, and customer communication.

Pain points:

- Lag time when uploading items scanned items (through handheld devices) to the main system
- Supply chain disruptions and communicating the disruptions, conversions, and response plans to stakeholders
- Difficulty managing stock levels due to fluctuating demand and trends
- Overstock
- Too much time invested in maintaining facilities
- Physical/manual inventory counts is too time consuming
- Difficulty staying organized



Sales representative

Mike, Equipment, 6 years of experience

“Selling the right product, at the right price, at the right time, to the right customer”



Goals:

1. Exceeding sales quotas
2. Obtain orders from existing or potential prospects
3. Maintain positive relationships with clients and customers to ensure customer satisfaction/retention
4. Regularly measure and analyze key sales metrics (for reporting and optimizing business progress)
5. Manage customer profiles and accounts

Device usage:

- Brings laptop and smartphone everywhere if not in the office

Primary software and tools:

- CRM
- CPQ
- Microsoft office

Value Proposition: Mike is responsible for creating relationships with the customer and closing deals, increasing revenue for his organization. He builds trust with customers by being their main point of contact, understanding their needs, connecting them to the right experts, and identifying solutions for them. Mike is typically a road warrior, shuffling multiple tasks: making endless calls, following up with prospects and existing customers, preparing sales contracts, and traveling extensively to sell products to retail or wholesale businesses. Mike needs to always be prepared with in-context and timely insights of the account for anyone in his organization to ensure a seamless customer experience.

Typical day:

- Mike starts his day checking his emails and joining a quick stand-up meeting with his team that covers yesterday's target achievements and reviewing pending tasks
- After the meeting, it's back to checking his emails and making calls (cold calls and voicemails).
- Throughout the day he's touching base with the marketing team and researching prospect's backgrounds so that he can focus on those who could benefit from his products
- Before he leaves for the day, he checks in with his manager discussing areas of improvement, existing strategies and action plans

Ideal experience:

- Conveniently reach out to prospects via email or phone
- Submit and process orders to ensure customer satisfaction
- Produce reports of recent results, accomplishments, and other key metrics (e.g. win rates, average revenue, lifetime value of a customer)
- Analyze market's potential, track sales, and status reports
- Expedite the resolution of customer problems and complaints
- Coordinate sales effort within team members and other departments
- Automate some of the sales outreach efforts

Pain points:

- Communication between siloed teams (sales and marketing)
- Not all information is housed in one application
- Research on future customers/gathering customer-specific data can be time consuming
- Slow sales cycles
- Difficulty keeping track of multiple pending items/tasks
- Mobile screen size limits screen visibility and navigation within the app
- Connectivity issues in certain areas affect information syncing