Persona & Use Case

User Persona

Agency Manager:

Demographics

Name: William Sherwin

Gender: Male

Age: 49

Location: Toronto

Occupation: Insurance Agency Manager

Income: $100,000

Experience: Insurance agent for 10 years and another 4 years as an insurance agency manager.

Behaviour:

Psychographs

Attitude: Passioned about his job, detail-oriented, values teamwork, loyalty and likes to be in control of the situation, aware of incoming issues so he can take proactive measures.

Fears: Being overwhelmed by the workload of managing a large number of agents and not being able to match the expected quality of work the is expected from his agency.

Needs/Goals

Needs: A solution to help him manage the agency, by reducing his workload and making all the information he needs available in one single place.

Goals: Have an intuitive system that does not require a lot of training and puts William in full control of the agency, being able to remotely supervise his agents' work and have real-time metrics.

User Stories:

* I need to be able to view the log of the conversations between my agents and our potential and current clients.
* I need to have close to real-time metrics about the agency, regarding client retention, client retention per agent and other relevant data.
* I need to have full access to the system, being able to manage the agents' and customers' accounts.