Persona & Use Case

User Persona

Insurance Agent:

Demographics

Name: Saul Goodman

Gender: Male

Age: 44

Location: North York

Occupation: Insurance Agent

Income: $65,000

Experience: Insurance agent of 7 years.

Behaviour:

Psychographs

Attitude: Easy going attitude. Never takes things at face value. Always wants to get to the bottom of problems

Fears: Often struggles with meeting project deadlines. Generally focuses on one thing at a time. Gets overwhelmed with too many tasks.

Needs/Goals

Needs: A solution to cut down on basic information, in order to speed up the process of achieving client retention.

Goals: A system that will be easily accessible and easy to navigate, that will help his clients.

User Stories:

1. I need to be alerted by the system whenever a client is eligible for a new insurance offer
2. I need a system that can generate estimates, based on standardized data sets, before I start working with clients
3. I need to be able to view my clients profile, so I can more accurately assist them