



Says

What have we heard them say?  
What can we imagine them saying?



Thinks

What are their wants, needs, hopes, and dreams?  
What other thoughts might influence their behavior?



Persona’s name  
Short summary of the persona

- Create a Zoho Books account.
- Configure your company's profile, including business name, address, and contact details.
- Set your fiscal year, tax preferences, and currency.

Create a chart of accounts tailored to your consulting business. Include categories for income, expenses, assets, and liabilities.

Remember that these are general guidelines, and you should adapt them to the specific needs of Bright Ideas Consulting. Additionally, it's essential to stay informed about any updates or changes in Zoho Books' features and best practices in financial management.

Utilize Zoho Books' reporting features to generate financial statements, profit and loss reports, and other essential financial documents.

- Familiarize yourself and your team with Zoho Books through training or tutorials.
- Use Zoho's customer support resources if you encounter issues

Remember that while Zoho Books can streamline your financial management, it's essential to stay organized, track transactions diligently, and ensure compliance with tax regulations to keep your consulting business running smoothly.

Maintain a database of clients and vendors in Zoho Books. This will help with client billing and vendor payment management.

Bright Ideas Consulting is a Private Limited company also registered under GST in Tamil Nadu. Bright Ideas Consulting offers various expert consulting services in India and outside India.

Bright Ideas Consulting, a consulting firm, relies on Zoho Books to track their billable hours, expenses, and client invoices.

Zoho Books is your one-stop platform for managing your accounting tasks and organizing your transactions. It's a single secure location to keep up with your company's bills and invoices, reconcile your bank statements, control your spending, oversee projects, and eliminate GST compliance worries.

Zoho Books is designed to help your business connect across multiple platforms. Extend your accounting with a library of more than 300 business apps via Zapier, or take advantage of built-in connections with other apps in the Zoho suite.

Zoho is easy to learn because of its intuitive user interface, and its built-in AI powers a wide range of tools, from contact and deal management to advanced data analytics. Zoho is also an omnichannel solution, facilitating customer communications.



Does

What behavior have we observed?  
What can we imagine them doing?



Feels

What are their fears, frustrations, and anxieties?  
What other feelings might influence their behavior?