



Lauren

accountant

contractor

Lifestyle focused

Flexible

Highly detailed

Creative

NEEDS

- Keep my clients happy
- Understand how to handle volume increase
- Build more capacity
- Access to many clients' accounts
- Check all banking activity
- Procure my next contract
- Manage CRA payments
- A successful business to support herself

WANTS

- One login
- Be an advisor
- Grow her practice
- Move stuff easily between my online banking and the Tools I use on my own
- Hire more people in the future
- Integration with 3rd party software

BRIEF STORY

TECHNOLOGY



Laptop

Tablet



Excel

Instagram

Twitter

Google sheets

Turbotax

STAGE OF GROWTH:

