



Stephen

experienced business owner

partner detail-oriented

mentor mature busy

highly connected to industry

NEEDS

- Know cash projections and positions
- Know when I can make my next move to become a Commercial client
- A comprehensive idea with exact details on my business health
- Focus on my business, not on banking platform
- Find a new supplier
- Manage CRA payments
- Manage a team

WANTS

- His business to sustain his lifestyle
- See my financial split
- Compensate for people/processes I don't have in house, through banking tools
- Access to information fast and easy
- Engage with other small business owners
- See my spending

BRIEF STORY

TECHNOLOGY



Desktop / Laptop



Tablet



Excel

LinkedIn

QuickBooks

STAGE OF GROWTH:

STARTUP

GROWTH

EXPANSION

MATURITY

DECLINE/SELLING