

[insert photo]

NAME _Bill_____ **INDUSTRY/SEGMENT** _Manufacturing_____

JOB TITLE OR FUNCTION _Accountant_____ **REPORTS TO** _CFO_____

AGE _30_____ **EDUCATION** _Advanced_____ **YEARS IN THIS JOB** _7_____

TECHNOLOGY USED _Excel, ERP_____

TECHNICAL PROFICIENCY

Novice _____ Proficient ___X_____ Expert _____

Situation

A typical day in the life of your persona

Bill works with numbers all day long. He has Excel open all day long and is a wiz in Excel. He's a master of formulas and pivot tables. The GL/ERP system that his company uses is Oracle, which means it looks like it was built in the last century (late 1990s) and isn't as easy-to-use as any technology built in the last 10 years, but he knows exactly what he needs to do in it, nothing more. He is responsible for reporting accurate financial numbers.

A typical interaction with your product

Bill spends time in our software for several hours the last week of every month, entering numbers. Since he doesn't spend as much time in our software as he does in Excel or his ERP, it takes him a few minutes to remember how to use it, even though he finds it easier to use than his ERP

A perfect day

A perfect day for Bill is when all the numbers come out right the first time, there are no new errors, and there are no new entities that Bill has to report on, he's just adding monthly numbers. Everything he has entered gets reviewed and approved with nothing coming back to him with corrections or questions.

Top of Mind Issues

Our software is used for new accounting standards, which is unusual since accounting has been your basic debit and credit from its inception. He worries that he's following the standards correctly and wants to successfully get through their audits with no issues. He doesn't have anyone to turn to in the office, since no one else knows the new standards either and he has to rely on what he can find on the internet to answer his questions.

Other Information

What they read online and offline; member associations

Budget approval levels and ROI expectations

How the persona is rewarded or motivated (compensation, bonus, commission, other recognitions)

Written By _____ **Date** _____

