

# Daniel



**Age**  
**45 to 54 years**

**Highest Level of Education**  
**Bachelor's degree (e.g. I**

## Social Networks



**Industry**  
**Bank**

**Organization Size**  
**51-200 employees**

## Preferred Method of Communication

- Phone
- Email
- Face-To-face

## Tools They Need to Do Their Job

- Business Intelligence Dashboards
- Accounting and Bookkeeping Systems
- CRM Software
- Email
- Reporting Software
- Employee Scheduling Software

## Job Responsibilities

Operation, administration, marketing, training, lending and security of a local bank branch

## Their Job Is Measured By

Size of customer base, efficiency of operations and resource use, staff turnover

**Reports to**

CEO

**Goals or Objectives**

Revenue, brand perception

**They Gain Information By**

Conferences, continuing education

**Biggest Challenges**

- Navigating Client Relationships & Communications
- Project Management & Disorganization
- Problem Solving & Decision Making