

Personas (Version 1)

Alice Apple

- Female, 35 years old
- Relatively quiet and keeps to herself, but is dedicated to completing her tasks in a punctual manner
- Analyst at Reva Agency, which provides an emphasis on language training services for newcomers
- Technologically proficient while using her smartphone to complete any work that she has not finished in the office such as emails, scheduling meetings, and creating spreadsheets
- Really comfortable with Microsoft Excel and iCare templates, as she has been working with these templates for over 3 years now
- Wishes to be able to upload single or multiple iCare spreadsheets at a time when uploading client information
- Extremely busy as she is constantly gathering new information and updates from clients, so she needs to be able to update these incremental changes in a timely manner
- Comfortable with speaking, reading, and writing both English and French
- Estimates that during peak seasons, she can get anywhere from 75-100 new clients at a time
- Currently uses text files to view her own clients' data, and is flustered by how it is not presented in a professional manner

Bob Beroy

- Male, 58 years old and is fluent in only English
- Supervisor at Proxo agency, which provides employment services for newcomers
- Easy, outgoing, and is extremely calm and patient when consulting with newcomers
- Technically challenged and incompetent, can only use technology to view and send emails, along with other simple tasks
- Main goal is to increase employee productivity and track the progress of all the information uploaded by each employee
- Wants to minimize the time between client sending new information and the application updating the info
- Wants to track all the information updated by his employees, including what was updated, when it was updated, and by which employee
- Has access to all the info uploaded by his employees, as he expects that some employees are much more careless with data entry which leads to more typos
- Currently spends a lot of time answering questions from clients regarding when they will receive assistance, and is constantly receiving pressure to expedite the process

Charlie Charles

- Male, 25 years old and is fluent in only English
- Likes to follow a routine procedure, and does not like losing or misplacing things
- Admin for the application, and is responsible for keeping the service up and running
- Neutral party who has access to all the information in the application, and is allowed to query the data to answer legitimate requests from agencies and CCS
- Responsible for performing manual merges after consulting the necessary parties involved when there are conflicts in client data changes
- Technically proficient with Excel and SQL to perform database changes, and is constantly responding to requests and concerns through his smartphone
- Creates accounts for all other users and restricts their privileges and permissions accordingly
- Frustrated with how much storage is being wasted by the storage of duplicate information
- New accounts are created once every few months and on special occasions, such as the on-boarding of a new agency

David Doe

- Male, 41 years old and is fluent in strictly English
- Project manager at CCS (the organization responsible for generating reports)
- Currently instructs his employees to manually use Excel to generate graphs based on the limited data available
- Responsible for generating summary reports, trend reports, and other funding reports 2-4 times a year based on demand and needs
- Extremely professional and emphasizes generating reports as soon as possible to ensure funding gets to the hands of those who need it immediately
- Organizes all his tasks based on priority, and is strict when it comes to employees making typos and careless mistakes
- Not familiar with technology and is limited to email and smartphone usage for videos and pictures, and currently has employees generate reports for him
- He needs technology to be as simple as clicking a single button, and having it all done without his attention

Ellie Fernandez

- Female, 41 years old
- Spanish is her primary language, and English is her second language
- Newly hired at Bogo agency, and has received minimal training
- Extremely friendly and outgoing when communicating with peers, and is always asking questions when unsure
- Inconsistently uses postal code and phone number formats, so finds herself going back multiple times to bring them to a consistent standard
- Unorganized and constantly finds herself skipping fields when entering info into spreadsheets
- Not really comfortable with technology and uses Excel with limited capabilities
- She is limited to what you teach her, but is not willing to learn new techniques and technologies on her own unless she is required to
- Currently is always frustrated because her manager always complains about her clients' data not being completed or being extremely slow at data entry