# Target Users & Personas

## Primary Users (Daily/Weekly Usage)

### Persona 1: **Department Director Donna** 👔

**Role:** Director of Water & Field Services **Age:** 48 | **Tech Savvy:** Medium **Goals:** - Create comprehensive 3-year strategic plan for her department - Secure funding for critical infrastructure initiatives - Demonstrate accountability and transparency to City Manager/Council - Track progress and adjust plans mid-year if needed

**Pain Points:** - Overwhelmed by the 1,400-line template - Unsure if budget estimates are realistic compared to other departments - Needs to coordinate with Public Works on shared initiatives - Tracking quarterly milestones manually in spreadsheets

**Usage Patterns:** - Intense usage during planning season (July-September) - Monthly updates to initiative status and KPIs - Quarterly milestone reviews - Ad-hoc budget adjustments throughout the year

**Key Workflows:** 1. Create new strategic plan from template 2. Add initiatives with detailed financial analysis 3. Invite City Manager for review/comments 4. Submit for City Council approval 5. Monitor progress dashboards monthly

### Persona 2: **Strategic Planner Sam** 📊

**Role:** Department Strategic Planning Coordinator **Age:** 32 | **Tech Savvy:** High **Goals:** - Support Department Director in creating high-quality strategic plans - Ensure consistency with city-wide strategic priorities - Coordinate with Finance on budget validation - Track dependencies with other departments

**Pain Points:** - Manually formatting Word documents to match template - Chasing down information from division managers - Keeping track of comments from multiple reviewers - Reconciling budget numbers between spreadsheets and document

**Usage Patterns:** - Daily usage during planning season - Collaborates with Finance, IT, HR on shared initiatives - Generates reports for leadership meetings - Updates KPIs and milestone status

**Key Workflows:** 1. Draft initiatives based on Director’s priorities 2. Coordinate with collaborating departments 3. Input budget data and validate funding sources 4. Track review comments and implement changes 5. Generate status reports

## Secondary Users (Weekly/Monthly Usage)

### Persona 3: **City Manager Chris** 🏛️

**Role:** City Manager **Age:** 55 | **Tech Savvy:** Medium **Goals:** - Understand strategic priorities across all departments - Ensure plans align with City Council’s vision - Make funding decisions based on ROI and priority - Present consolidated plans to City Council

**Pain Points:** - Must read through 10+ lengthy strategic plan documents - Difficult to compare initiatives across departments - Budget aggregation requires manual Excel work - Can’t easily identify high-risk or delayed initiatives

**Usage Patterns:** - Reviews all department plans during approval cycle (Aug-Sept) - Monthly dashboard reviews - Prepares quarterly reports for City Council - Ad-hoc queries (“What’s our total IT investment?”)

**Key Workflows:** 1. Review draft plans from all departments 2. Provide feedback via comments 3. Approve/request revisions 4. Generate consolidated budget reports 5. Monitor at-risk initiatives

### Persona 4: **Finance Director Fran** 💰

**Role:** Director of Finance **Age:** 52 | **Tech Savvy:** High (Excel expert) **Goals:** - Validate budget estimates and funding sources - Track total investment by fiscal year - Ensure initiatives align with available funding - Support grant application processes

**Pain Points:** - Departments submit inconsistent budget formats - Must recreate financial summaries in Excel - Grant funding status not centrally tracked - Difficult to model funding scenarios (what if budget cut 10%?)

**Usage Patterns:** - Heavy usage during budget planning (June-August) - Reviews all initiative budgets for accuracy - Monthly reconciliation with financial systems - Quarterly funding source reports

**Key Workflows:** 1. Review and validate initiative budgets 2. Identify grant opportunities 3. Run funding scenario analyses 4. Generate financial reports for City Council 5. Track budget vs. actual spending

## Tertiary Users (Occasional Usage)

### Persona 5: **City Council Member Carol** 🗳️

**Role:** Elected City Council Member **Age:** 61 | **Tech Savvy:** Low-Medium **Goals:** - Understand departmental priorities and investments - Make informed approval decisions - Hold departments accountable for results - Represent constituent interests

**Pain Points:** - Strategic plans are long and dense - Hard to understand trade-offs and alternatives - Limited ability to track progress after approval - Constituent questions about plan status

**Usage Patterns:** - Reviews plans during approval cycle (September) - Quarterly progress check-ins - Responds to constituent inquiries

**Key Workflows:** 1. Review strategic plan summaries 2. Ask questions via comments (or in Council meetings) 3. Vote on plan approval 4. Monitor progress via public dashboards

### Persona 6: **Engaged Citizen Emily** 🏘️

**Role:** Carrollton Resident, Community Advocate **Age:** 38 | **Tech Savvy:** High **Goals:** - Understand how tax dollars are being invested - Track progress on community priorities (parks, infrastructure) - Provide feedback on proposed initiatives - Hold government accountable

**Pain Points:** - Plans published as lengthy PDFs, hard to navigate - No way to see progress updates between annual reports - Can’t easily find initiatives relevant to her neighborhood - No mechanism to provide feedback

**Usage Patterns:** - Reviews published plans when available - Checks progress quarterly (if available) - Attends City Council meetings when major initiatives discussed

**Key Workflows:** 1. Browse published strategic plans by department 2. Search for initiatives (e.g., “park improvements near me”) 3. View progress updates and KPIs 4. (Future) Comment or ask questions