



Says

What have we heard them say?
What can we imagine them saying?



Thinks

What are their wants, needs, hopes, and dreams?
What other thoughts might influence their behavior?

WHAT ACTIONS DO THE BUSINESS OWNER TAKE TO MANAGE THEIR EXPENSES? THEY MIGHT SET UP A BUDGET, OR THEY MIGHT USE A EXPENSE TRACKING APP.

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FINANCIAL ADVISORS MAY SAY: "CONSIDER THE HISTORICAL DATA TO MAKE ACCURATE ESTIMATES."

TEAM MEMBERS MIGHT SAY: "WE NEED TO BUDGET FOR THE UPCOMING QUARTER."

TEAM MEMBERS MIGHT THINK: "HOW CAN WE ALLOCATE FUNDS WISELY?"

FINANCIAL ADVISORS MAY THINK: "ARE THEY CONSIDERING ALL COST CATEGORIES?"



WHAT ACTIONS DO THE BUSINESS OWNER TAKE TO MANAGE THEIR EXPENSES? THEY MIGHT SET UP A BUDGET, OR THEY MIGHT USE A EXPENSE TRACKING APP.

WHAT EMOTIONS DO THE BUSINESS OWNER EXPERIENCE ABOUT THEIR EXPENSES? THEY MIGHT FEEL STRESSED, OR THEY MIGHT FEEL CONFIDENT THAT THEY ARE ON TOP OF THEIR FINANCES.

TEAM MEMBERS MAY TAKE ACTIONS LIKE: RESEARCHING INDUSTRY BENCHMARKS.

FINANCIAL ADVISORS MAY TAKE ACTIONS LIKE: ANALYZING FINANCIAL STATEMENTS.

TEAM MEMBERS MAY FEEL: ANXIOUS ABOUT MANAGING EXPENSES EFFICIENTLY.

FINANCIAL ADVISORS MAY FEEL: A SENSE OF RESPONSIBILITY FOR ACCURATE FINANCIAL GUIDANCE



Does

What behavior have we observed?
What can we imagine them doing?



Feels

What are their fears, frustrations, and anxieties?
What other feelings might influence their behavior?