

Julie ROBERT



"I'd like to have less prospection and focus on my customers' needs"

AGE: 32

WORK: Banker

FAMILY: Married

LOCATION: Fontenay S/B

ARCHETYPE: The Realist

Organized

Practical

Focused

Hardworking

Personality



Bio

Julie is a banker at Société Générale. She has goals and objectives to achieve each month and year. Mostly growing her sales productivity and retaining customers. She is frustrated by the fact that no matter how much time she spends to contact her customers, she has only a 10% response rate.

Besides, she has noticed that a lot of customers could benefit from tax exemption.

This new app could help increase her sales productivity and target customers' needs.

Preferred Channels

Chrome



Mobile



Email



Face to face



Goals

- Fewer sales prospecting
- Improve her sales productivity
- Focus on her customers' needs
- Reduce her client's tax income
- Growing and retaining customers

Frustrations

- Too much time prospecting
- Too many customers do not answer emails and phone calls from their banker

Motivations

Upselling



Comfort



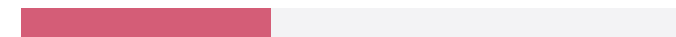
Convenience



Speed



Loyalty



Company

