

User Persona

TIP: Duplicate these pages to repeat the exercise for another persona.



Persona 1
Joe Aldo

Key Attribute

Add adjectives to describe this persona

Joe Aldo is smart, ambitious, educated, passionate, and logical.

Short Description

Add phrases to bring this persona to life

Joe is a 22 year old college graduate who majored in English. He is taking a gap year before he attends Law School. He wants to learn how to invest in the stock market and diversify his income to help pay for his student loan debts. He doesn't have an economic or a financial background besides a few economics classes he took in college, but he is a smart and logical thinker, and is ambitious about his goals.

Needs

Add the persona's reasons for taking this particular journey

Joe needs a user friendly app that will allow him to balance his time between studying for Law School and having an additional source of income. The app should allow him to view his portfolio, teach him about the stock market, and give him helpful tips. He also needs tools and visualizations backed by data.

Challenges

Add pain points or potential frustrations

Joe has a busy schedule. He has a moderate budget, but since he is ambitious, he can sometimes make risky. He is worried about this affecting his stock market choices. He is also overwhelmed by the stock options and is unsure of what he wants to invest in.

Opportunities

Add ways that your product or service can address the pain points

Our product is perfect for Joe because it provides beginner-friendly content to users like Joe. It is designed to be used as Joe needs, and will send notifications to him at a frequency he chooses to remind him to check on his portfolio. The app offers educational content relating to finance, budgeting, and market trends which will all help Joe to make informed decisions. Additionally, there is a cap he can set for himself on how much he'd like to invest so he is not prone to making risky decisions. The app also allows for Joe to explore different stocks and a bit about their backgrounds in a digestible format so that he can learn more about what investments are right for him.

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Persona 2
Jane Burke

Key Attribute

Add adjectives to describe this persona

Jane Burke is busy, hardworking, disciplined, thorough, and intelligent.

Short Description

Add phrases to bring this persona to life

Jane is a 27 year old teacher who recently had a new baby. She is also an elementary school teacher. She wants to learn how to invest in the stock market so that she can use her portfolio to help diversify her income and pay for her baby’s college. She doesn’t have much experience with the stock market, and is daunted by it, but she’s very intelligent and eager to learn.

Needs

Add the persona's reasons for taking this particular journey

Jane needs an easy-to-use app that is beginner friendly. It should allow her to view investments in concisely. She needs an app that will teach her about the stock market. She also needs an app that allows her to take note of major market trends.

Challenges

Add pain points or potential frustrations

Jane has a demanding schedule. Since this is her first time investing, she has a low budget and would like to play it safe at first. She is afraid of losing the money she has invested.

Opportunities

Add ways that your product or service can address the pain points

Our product is unique in that it provides educational content for beginners like Jane. It is designed to be used by beginners, so it is not necessary that Jane has to go on the app everyday, though she is more than welcome to. The app explains common stock market key points, rules, and misconceptions that will allow Jane to better understand how to invest her money. It provides market trends and informative charts so that Jane can make financially sound decisions. It allows her to place a cap on how much she invests, so that Jane never loses more than she anticipates to. Overall, it is in a format that allows Jane to balance her investment choices with her other priorities.

Pictures

<https://www.etsy.com/listing/1454392595/matching-mommy-and-baby-hats-mama-and>

<https://hunterandsarah.com/best-month-uva-graduation-photoshoots/>