

# MEET, JACOB FITZGERALD



"I'm trying to stay afloat in the numbers and the noise. Some days, balance feels like a distant dream."

## Financial Analyst @ CBRE

**Occupation:** Financial Analyst @ CBRE  
**Activities:** Liam enjoys quiet, reflective activities that help him unwind, like reading, watching A24 films, and playing music. Recently, he has started learning to play the guitar.

**Education:** Bachelor's Degree in Finance  
**Tech Skills:** Mid-Tier  
**Salary:** Mid-Tier  
**Time in Role:** 3 years  
**Years Experience:** 6 years  
**Company Structure:** Medium, 6 coworkers, 1 Team Lead

**Age:** 25 Years Old  
**MBTI:** INFP, 9w1  
**Traits:** Adaptable, Patient, Responsible, Collaborative  
**Family:** Single, Has a Dog  
**Location:** Plano, Texas

## RESPONSIBILITIES / TASKS

- **Analysis:** Review financial reports and data carefully
- **Reporting:** Prepare accurate budgets and forecasts
- **Collaborating:** Coordinate with team on tasks and projects
- **Problem Solving:** Identify discrepancies and propose solutions

## PAIN POINTS

- **Stress:** Overwhelmed by workload and tight deadlines
- **Time:** Struggles with time management
- **Isolation:** Limited social interaction at work
- **Change:** Adjusting to post-COVID work impacts

## GOALS + NEEDS

- **Balance:** Reduce stress while staying productive
- **Focus:** Work in clear, organized environments
- **Connection:** Build supportive interactions with colleagues
- **Growth:** Feel purposeful and find meaning in work

## CONTEXT / ENVIRONMENT

- **Team:** Small, collaborative finance department
- **Work Style:** Hybrid
- **Culture:** Supportive but fast-paced
- **Focus:** Data-driven tasks with personal impact

## KEY DATA & DESIGN DRIVERS

### SIMPLICITY

Simple layouts help him stay focused without feeling overwhelmed by details. The goal is to remove distractions and make tasks feel more manageable.

### CLARITY

Clear and organized data helps understand information faster and with less stress. The priority is transparency and straightforward presentation.

### EMOTIONAL EASE

A calm, balanced design supports his focus and well-being. Soft visuals and gentle pacing reduce anxiety during busy periods.

### PERSONAL MEANING

He feels more motivated when his work connects to purpose or growth. The focus is on systems that remind him why his efforts matter.

## EXPERIENCE SOLUTIONS

### USER SUPPORT

Onboarding Tutorials  
Mentorship Programs  
Help Center / FAQ  
Training Hub

### ENGAGEMENT

Personalized Dashboards  
Optional Social Sharing  
Quiet Progress Tracking  
Purpose-Oriented Insights

# MEET, MEERA KHAN



**Age:** 36 Years Old  
**MBTI:** ENFJ, 2w1  
**Traits:** Ambitious, Adventurous, Empathetic, Detail-Oriented  
**Family:** Married, Has a Cat  
**Location:** Frisco, Texas

" I believe in pushing boundaries, but never at the cost of our well-being. Growth is sustainable only when it's shared.

## Finance Team Lead, @ CBRE

**Occupation:** Finance Team Lead @ CBRE  
**Activities:** Meera enjoys traveling and hiking, often traveling for both work and personal recreation. Her recent favorite hiking experience was at the Rocky Mountains in Colorado.

**Education:** Master's Degree in Business Administration  
**Tech Skills:** Mid-Tier  
**Salary:** High-Tier  
**Time in Role:** 6 years  
**Years Experience:** 10 years  
**Company Structure:** Medium, 7 Direct Team Members

## RESPONSIBILITIES / TASKS

- **Analysis:** Review budgets, forecasts, and financial reports
- **Team Management:** Oversee and support finance team operations
- **Efficiency:** Ensure accuracy and smooth workflows
- **Communication:** Share insights with leadership and teams

## PAIN POINTS

- **Deadlines:** Tight schedules causing stress
- **Clarity:** Unclear roles or responsibilities
- **Time Pressure:** Little room for creativity or reflection
- **Balance:** Hard to maintain work-life stability

## GOALS + NEEDS

- **Culture:** Build a supportive, efficient team environment
- **Transparency:** Improve workflow visibility and collaboration
- **Growth:** Develop systems that scale with the company
- **Well-being:** Maintain accuracy while reducing burnout

## CONTEXT / ENVIRONMENT

- **Company:** Mid-sized, fast paced finance department
- **Work-style:** Hybrid setup with frequent collaboration
- **Culture:** People-first and team-oriented leadership
- **Focus:** Data-driven but centered on well-being

## KEY DATA & DESIGN DRIVERS

### TIME-EFFICIENCY

Streamlined systems help reduce extra steps and make work faster. The priority is on saving time for what matters most while keeping accuracy high.

### ADAPTABILITY & GROWTH

As the company changes, flexible systems help the team adjust easily. The goal is to build structures that grow with both the people and the business.

### TEAM CONNECTIVITY & COLLABORATION

Working closely together keeps the team motivated and aligned. Open communication and shared tools help everyone stay connected and on the same page.

### ORGANIZATION

Clear structure makes information easy to find and understand. Good organization keeps work smooth and prevents confusion.

## EXPERIENCE SOLUTIONS

### USER SUPPORT

Onboarding Tutorials  
Accessibility Features  
Help Center / FAQ  
Resource Library

### ENGAGEMENT

Productivity Tracker  
Social Integration Features  
Community Forums  
Cross-Functional Dashboards