

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

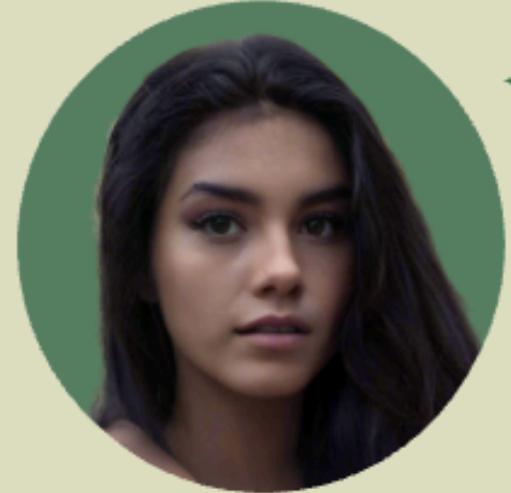
USER SUPPORT

- Onboarding Tutorials
- Mentorship Programs
- Help Center / FAQ
- Training Hub

ENGAGEMENT

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

MEET, MEERA KHAN



"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

Age: 36 Years Old

MBTI: ENFJ, 2w1

Traits: Ambitious, Adventurous, Empathetic, Detail-Oriented

Family: Married, Has A Cat

Location: Frisco, Texas

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.

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.

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.

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