

Persona. Elena Smith

Goal. To save money, grow her business, and automate her inventory processes.

Action	Identify issues with current processes	Explore the market for a solution	Select an option that meets requirements	Start a one-month free trial of new platform	Purchase platform for the business
Task List	<p>A. Finish daily tasks at EOD</p> <p>B. Gather materials needed for inventory (pencil, notepad, and iPad)</p> <p>C. Start inventory</p>	<p>A. Ask financial advisor for help (recommendation. go digital)</p> <p>B. Research apps and software that automate inventory processes</p> <p>C. Have conversation with my account manager</p>	<p>A. Compare different services, rates, and features</p> <p>B. Select an option that fits needs</p> <p>C. Download the app or software and begin a free trial</p> <p>D. Host training to use new program</p>	<p>A. Enter previous store data</p> <p>B. Add calendars for scheduling (orders, deliveries, shipments)</p> <p>C. Add supplier information</p> <p>D. Enter new data for next month</p> <p>E. Assign tasks to employees</p>	<p>A. Continue to use program for store</p> <p>B. Fully integrate new system</p> <p>C. Provide system access to account advisor</p>
Feeling Adjective	<p>I'm annoyed and frustrated with having to do inventory (it takes forever!)</p> <p>There are so many opportunities for processes to be streamlined—I want my employees to be able to do this even when I'm not here.</p>	<p>I'm exasperated—this process just isn't working for me</p> <p>I want to be able to grow my business but also have more time for myself at the end of the day</p>	<p>I'm concerned about available options</p> <p>The program I choose needs to: have simple data entry and onboarding, integrate seamlessly with my old system, have an efficient ordering system and "offline" mode.</p>	<p>I'm anxious about these programs being able to meet my needs, but remaining hopeful</p> <p>I need to work with the team to get this month's information uploaded and begin prepping for next month.</p>	<p>I'm impressed! This program has worked so well! Beyond my expectations.</p> <p>Our first month was great and the next is going to be even better!</p> <p>Increased efficiency here means I can spend more time on myself and my family.</p>
Improvement Opportunities	<p>Check on inventory processes anytime, from anywhere</p> <p>Archive and access to archive of previous data sets</p>	<p>Adding search tags to make the product easier to find online</p> <p>A wide advertising platform (social media, tech sites, app stores, etc.)</p>	<p>Comprehensive free trial with access to most critical features</p> <p>Affordable for small businesses or entrepreneurs</p> <p>Have clear and easy user onboarding</p>	<p>App should:</p> <p>Auto calculate monthly costs</p> <p>Assign tasks to teams or employees</p> <p>History database</p> <p>Scan barcodes</p> <p>Price tracker</p> <p>Keep track of completed, in progress, upcoming tasks</p>	<p>Ability to integrate with other systems, e.g., accounting, emails, invoices, AI assistants, personal calendars, etc.</p> <p>Notifications of new features</p> <p>Recommendations for add-ons</p> <p>Ability to manage multi-store systems</p>