Name	Marcus Spencer
Age	23
Biography	Marcus Spencer has just joined the company on a one year graduate scheme contract. His undergraduate dissertation explored the implications of poor retirement planning amongst the “baby boomer” generation. He previously worked as a cashier at a local grocery store and as an administrative assistant at his parents’ furniture company.
Education	Bachelor of Arts, Economics and Sociology University of Manchester
Job Title	Graduate Analyst, Fixed Income
Key Statistics	- 2 years of experience working as an administrative assistant - 11 months until final appraisal to determine if he will be given a permanent contract - 12 number of graduates given permanent contracts in 2016 - 19 total number of new employees hired as part of the graduate scheme
Location	Leyton, London
Commute Pattern	Cycle, tube, or bus (depending on the weather)
Work patterns	Works in the office at a desk, Monday to Friday from 8am to 6pm
Digital Confidence	5
Digital Literacy	3
Quote	“I want to complete the training as soon as possible so that I can properly join my team and start working on existing client accounts. But I can only do the training modules when I am in the office. And because I am very busy during the day, I have to stay late or come in at the weekend to get it done. ”
Needs	- Flexible training platform that allows for anytime and anywhere learning, not just in the office - Notifications about new training requirements - Ability to email line manager and office mentor once training has been completed
Frustrations / Pain Points	- Must be in the office to do training - Difficult to share training results with line manager - Had to repeat two modules due to system glitches
Motivations / Goals	- Client account work: cannot work on client accounts until all company-mandated training modules have been completed and verified by line manager - Positive appraisal: wants to secure a permanent role at the end of his graduate scheme contract by showing his ability to successfully manage existing client accounts

Name	Louise Warren
Age	32
Biography	Louise Warren joined the firm after spending the last 8 years working for small financial services companies and large, multinational banks.
Education	Bachelor of Arts, Mathematical Economics, UCL
Job Title	Wealth & Capital Growth Specialist
Key Statistics	- 8: years of experience working in the financial services industry - 7: clients she personally works with to manage their wealth and assets - 2: graduate analysts working on her team - 1: number of modules she had to redo because system didn't properly recognise that she had completed it
Location	Richmond, London
Commute Pattern	Tube/train → walk
Work patterns	Works in the office Monday to Friday from 9am to 5pm Also does extensive on-site client work, meeting with clients in their homes or at a coffee shop
Digital Confidence	4
Digital Literacy	4
Quote	"I've got 8 years of experience. I shouldn't have to do training that takes me days to complete. You hired me for my experience and I already know everything covered in the training."
Needs	- Ability to bypass certain training courses/chapters due to experience - Mobile training that can be done offline
Frustrations / Pain Points	- Having to complete the training - Training covers topics she is already familiar with - Training can only be done in the office
Motivations	- No "annoying, patronising" emails from HR - Ability to work on client accounts from day 1 - Continued accreditation by FCA (?)
Goals	- To complete training quickly - To have system recognise her prior experience and customise her training to reflect that - To ensure that HR knows immediately when she has completed her training

Name	Kathryn Jackson
Age	51
Biography	Kathryn Jackson is the Senior Manager responsible for managing a constantly evolving team of Graduate Analysts.
Education	Bachelor of Arts, Economics, University of Essex
Job Title	Senior Manager, Graduate Analyst Team
Key Statistics	- 5: number of years she's been with the firm - 30+: number of Graduate Analysts she indirectly supervises each year - 400+: number of emails she receives each year detailing when a Graduate Analyst has completed a training course or requirement
Location	Islington, London
Commute Pattern	Tube/bus or walk, depending on the weather
Work patterns	- Works 5 days a week in the office, usually from 8:30am to 4:30pm - Often does a few hours of work on Sunday evenings to prepare for Monday
Digital Confidence	2
Digital Literacy	2
Quote	"I've had to go to IT and ask them to recover my emails because I missed notifications that someone has completed their training."
Needs	- An automated system that tracks when a Graduate Analyst has completed their training requirement - Notifications if training requirements are almost due - A system where she can search historic trends about training completion
Frustrations / Pain Points	- She receives individual emails every time someone completes a module - She manually tracks completion on a separate spreadsheet - To look at previous trends, she has to analyse data in Excel
Motivations	- To minimise workload and need for manual data entry - To improve communication with HR as spreadsheet has to be periodically sent to HR
Goals	- To ensure 100% completion within the first month of a Graduate Analyst beginning their employment

Name	Jeffrey Duncan
Age	46
Biography	Jeffrey Duncan has been working with the firm since 1999, when he joined just before the dot-com bubble started to burst in 2000.
Education	Bachelor of Arts, English Literature, Middlesex University Master of Business, Open University Certified Financial Planner
Job Title	Senior International Fixed Income and Retirement Income Specialist
Key Statistics	12: number of years he's been with the firm 20+: total number of years in the finance industry 23: number of pensioners that rely on him to manage their finances 8: number of different countries his clients live in
Location	St. Albans, Hertfordshire
Commute Pattern	Train → Tube → Walk
Work patterns	Works from home 2 days per week, Works in office from 8am to 4pm 3 days per week - Often travels internationally
Digital Confidence	3
Digital Literacy	2
Quote	"Training isn't something I think about. When you get an email from HR saying you need to complete training and get an email from a client concerned about the impact of exchange rates on their foreign pension, you obviously chose the client work over training"
Needs	- Silent notifications that training is outstanding - Mobile training that can be completed either at home or when travelling internationally
Frustrations / Pain Points	- Training isn't relevant to what he does - Once had HR chase him for months about overdue training that he already completed and ended up doing three times
Motivations	- Staying in good standing because his clients really rely on him - Minimising amount of training needed to be done - Staying current with his Certified Financial Planner standing
Goals	- Completing the training as quickly as possible - Ensuring that HR knows that he has completed his training