

Tom — Vice President of a virtual bank.

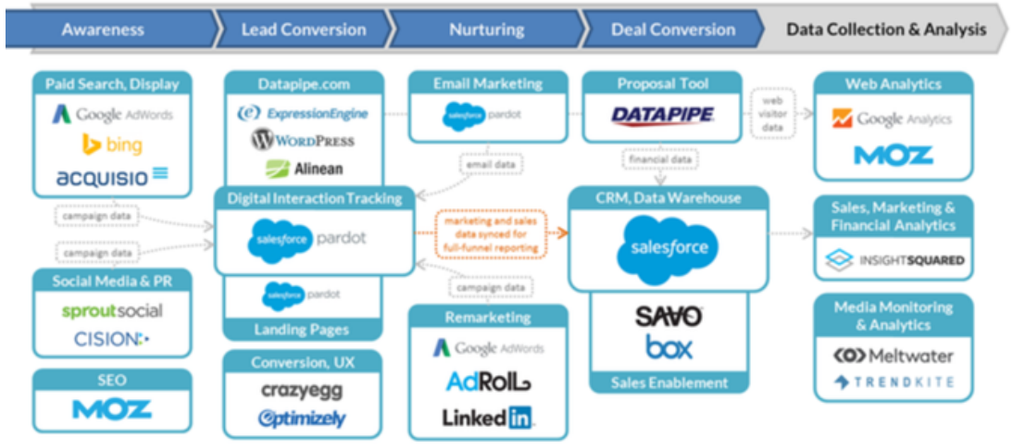
Looking to outsource the bank's app development team. He wants them to work closely with his marketing and sales teams to help them focus on user experience and customer service; their insights are the core of the redesign and they'll meet regularly.

Age: 56

Marital status: Divorced

Occupation: Financial Analyst / Marketing Consultant
Location: Ontario, CA

Budget: USD $500,000



Bio

Tom is a financial advisor that works in North America. He graduated 31 years ago and has a masters degree on marketing from a prestigious university, he's been working in account management, international investments and banking for 23 years in different banking institutions.

Although he's tried to follow the new trends in online banking he's no tech expert, he understands marketing principles really well but he's not up to date with current tools and technologies. He understands what all of the software they use does and how to operate it but he doesn't really understand how's the data collected, how to interpret the technical aspects of it or how to integrate the technology into his service but he knows quite well what the objectives are and how the app should function.

Needs

- Redesign an app for a virtual bank that includes better customer experience and integrations with the bank's website, ads and promotions.
- Find a cheaper development team that can work close to the same time zones as the rest of his company and understands English at a business level.
- A more efficient way to integrate his sales efforts with his mkt strategy.
- A way to up-sale the bank's other services to his current customers.

Pain points

- Concerned that he'll have to sacrifice important resources to find qualified experts.
- Worried that their app will only be one between many and won't get enough exposure on the internet if his customer experience is not up to par with the market's standards.
- Doesn't want their service to take too high a percentage from their sales or become just a "free tool" for debit accounts that will not invest in the other bank services.

axos BANK

QUONTIC

ally

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DISCOVER

Discover Bank, Member FDIC

Research

Quotes

> *"It's important that it becomes easy to use by our current clients and friendly, familiar even, for new ones"*

> *"It's really just boring tech... but boring tech doesn't mean a boring user experience"*

> *"The hardest part is managing the actual user transactions and external transactions in real time"*

Survey results
890 words

Ideal experience

- Coordinating easily between the development, sales and marketing teams to make changes fast and respond quickly to customer demands and experiences.
- Having pertinent and quick feedback from both users and developers.
- Easily integrating tools already in use by the team with new technologies.
- Developing a custom software that has integration with their CRM.



Nubia — CTO of a North American Freight Forwarding & Shipping Software Company.

Looking for IT Staff Augmentation. Since the pandemic stroke their company went through massive changes, they had more demand than ever but they had to adapt to the new environment and freight operations had to change drastically which opened their systems and left them vulnerable to cyber attacks.

Age: 41

Marital status: Single

Occupation: Full Stack Developer

Location: Seattle, WA.

Budget: USD $340,000

Top Trends in Cybersecurity, 2022



Bio

Nubia graduated 18 years ago and started developing software right away, she became more and more solicited with time, today her skills are in high demand but ITs have grown to a point where no one developer can specialize in everything so she started developing team leading and tool integration skills.

New market demands have forced her company to expand and focus on their cybersecurity. She's a great developer but she's no expert in cyber security nor is anyone on her team; they're looking forward to expanding their IT team and focus on new ways of tracking shipments.

Needs

- Covering her team's weaknesses and preparing for a massive expansion.
- Finding top talent to respond to delicate matters efficiently.
- Integrating new technologies to protect their customers' data.
- Provide a better tool for the operations team to track shipments, workloads and distribution.
- Protecting their assets and personnel.

Pain points

- Concerned that they'll have to sacrifice important resources to find qualified experts.
- Worried that the new technologies are advancing past their expertise.
- Doesn't want to destabilize their team dynamics with new talent and tools.

Research

Quotes

> *"We've been in this business for 15 years now and it had never change so rapidly before, this is truly a new era"*

> *"We have a great tema already and we will not settle for anything less than great"*

> *"Once your security is bridged there's no way to do damage control... once you lose, you've lost"*

Survey results
420 words

Ideal experience

- Not having to change their modus operandi to integrate new team members is the goal.
- Exploring new options should not take long, fast and easy implementation is imperative.
- A strong work ethic is an absolute must, they work with pretty sensitive information and a lot of investment from their customers.
- Clients need to have absolute control of their shipment and will work with the technology they build everyday so front end developers should be experts in user interface and experience.