USER PERSONA TEMPLATE

User persona example

P

1 NAME LABEL AND ROLE

Priya

accounts payable clerk

PERSONA TYPE

- ○ Proto-persona
- ● Qualitative
- ○ Statistical

10 RESEARCH BASE

12 one-hour interviews, 1 user group, 7 of 12 in this cluster

P01 P03 P04 P07 P09 P10 P12

2 CONTEXT OF USE

200–400 invoices a week, cleared in two sittings at a two-monitor desk

P01 P04 P09 P12

3 REPRESENTATIVE QUOTE

> "I save them up and clear them in two sittings, or I'm interrupted all day."

P04

4 GOALS AND MOTIVATIONS

- Close the week with no invoice older than 10 days
  P03 P04 P10
- Never pay a duplicate
  P01 P07 P12
- Leave on time at month-end
  P04 P09

5 KEY BEHAVIORS AND TASKS

- Exports the approval queue to a spreadsheet each Thursday
  P03 P04 P07 P10
- Emails approvers in one batch
  P01 P04 P09 P12
- Checks totals against the purchase order by hand
  P03 P09

6 BEHAVIORAL VARIABLES

Rhythm	1	Batches invoices weekly ↔ clears each invoice on arrival
Chasing	1	Chases approvers by email ↔ waits in the app
Tracking	1	Keeps a spreadsheet tracker ↔ app only
Authority	2	Prepares only ↔ approves up to a limit
Workload	5	Steady month ↔ month-end spike

7 FRUSTRATIONS AND CURRENT WORKAROUNDS

- Approvers answer only by email
  P01 P04 P09 P12
- A spreadsheet tracker kept "just in case"
  P03 P07 P10

8 NEEDS FROM THE PRODUCT

One list of every invoice still waiting on an approver

P01 P04 P09 P12

9 DESIGN IMPLICATIONS

- Bulk approve with exceptions pulled out
  P01 P03 P04 P09
- Approver nudges sent from inside the app
  P01 P04 P09 P12
- A duplicate warning before payment
  P01 P07 P12