

# Agile + Learning



# Persona: Varshreen (Direct Banking Advisor)



**Age** 27  
**Role** Banking Advisor  
**Business** Direct Sales  
**Tenure** 2-3 years  
**Key relationships** Team leader, CM, Helpdesk, Lending Coach, Pricing

**edge365** On Track

**Role challenges** Customer resolutions, balancing/prioritising tasks, time pressure

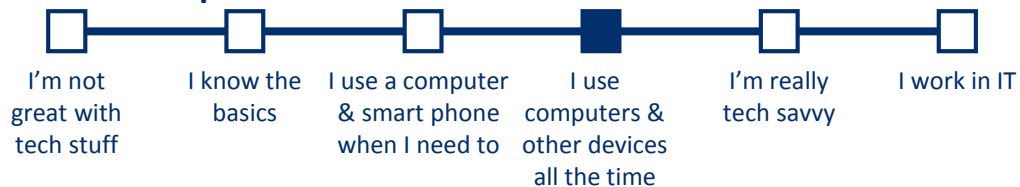
**Working environment** Call centre - lots of pressure, but rewarding

**Role similar to...** Store Banking Advisor

**Leadership level** Team Member

**Business acumen** Low/Medium

## Technical expertise



**Community presence** Low (involved at a personal level)

**Social media presence** Medium/High

**Accesses learning through...** Learning Edge

**Key learning need** Specific examples of conversations for customers in different situations

**Goes here for help**

**Learning:** Uses herself  
**Knowledge Base:** Uses herself  
**Other:** Refers to more experienced team members

**#1 Inspire question** What are the right open-ended questions to ask when the customer is being really directive?

# Persona: Mei (Store Banking Advisor)



**Age** 23  
**Role** Banking Advisor  
**Business** Store Network  
**Tenure** 3 years  
**Key relationships** Store Manager, Helpdesk

**edge365** On Track

**Role challenges** Repetitive, no planning, time urgent, experience

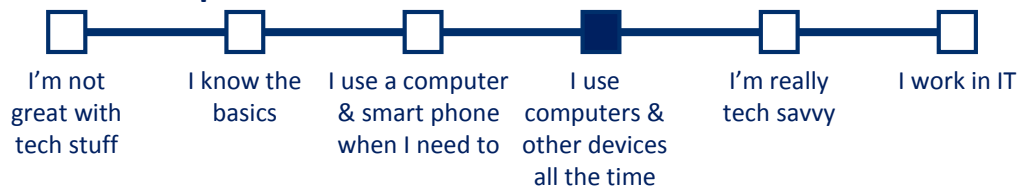
**Working environment** Mall - lots of pressure, but rewarding

**Role similar to...** Direct Banking Advisor

**Leadership level** Team Member

**Business acumen** Low/Medium

## Technical expertise



**Community presence** Low/Medium (can get involved in community events if needed)

**Social media presence** Medium/High

**Accesses learning through...** Learning Edge

**Key learning need** Specific examples of conversations for customers in different situations

**Goes here for help**

**Learning:** Uses herself  
**Knowledge Base:** Uses herself  
**Other:** Refers to more experienced team members

**#1 Inspire question** How does the true Inspire conversation reflect in CRM with the current time management?

## What's the opportunity?

### Customer Problems

What problems do prospective users and customers have today?

1

### Business Problems

What are the challenges/problems that impact your business?

2

### Customers & Users

What types of users and customer have the customer/business problems?

3

## How will we approach it?

### Solutions Today

How do users address their problems today?  
List competitive products or work-around approaches your users have for meeting their needs

4

### Budget

Are there any time/budget constraints?

5

### Solutions Ideas

List product, feature, or enhancement ideas that solve problems for your target audience. Which problems does your solution address?

6

## How will we know we are succeeding?

### User Metrics

What specific user behaviours can you measure that will indicate they try, adopt, use, and place value in your solution?

7

### Business Metrics

What business performance metrics will be affected by the success of this solution? These usually change as a consequence of users actually buying and using your solution

8

### How will users adopt and use your solution?

If your target audience discover your solution, what will they do differently as a consequence? How will that benefit them?

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