1. Inventory Manager Persona

- Primary user:

  - Likely using the system daily

  - Technical solution designed mostly around their needs

- Goals:

  - Accurate inventory auditing

  - System is conducive to completing job tasks

  - Reduced discrepancies in inventory records

  - Usable methods for revising false inventory reports

  - Ideally would receive automated reporting, especially with regards to low stock or repairs processes

- Skill Set:

  - Inventory management experience

  - Leadership/management, collaboration skills

  - Budgeting and financially conscious

  - Familiar with inventory softwares but not necessarily technically proficient

- Tasks:

  - Regular updates to inventory records

  - Inventory audits

  - Repair audits

  - Oversees reordering

  - These tasks are performed daily and are vital for fluid business operation

- Relationships:

  - Warehouse staff for inventorying and repairs

  - Procurement team for reordering

  - Operations/production teams for deployment and job assignment

  - Finance team for budgeting

  - IT team for system support

- Requirements:

  - Reliability of data,

  - User-friendly interface

  - Integrates nicely with existing systems

  - Basic training on new system

- Expectations:

  - System minimizes manual audit,

  - Real-time data tracking

2. Warehouse Staff Persona

- Primary user:

  - Using system daily to manage inventory and track repairs

- Goals:

  - Easy access to accurate inventory records

  - Centralized check-in/check-out process

  - Minimize data entry.

- Skill Set:

  - Hands-on inventory management

  - Proficient in repairs and reporting

  - Moderate computer skills, familiar with basic inventory software

- Tasks:

  - Add new equipment to system

  - Reports damaged goods and reports on repair process

  - Assists in larger inventory audits

  - These tasks are completed frequently and are important to accuracy of information. Reports are needed quickly and often

- Relationships:

  - Inventory managers for reporting and accuracy audits

  - IT team for system support

- Requirements:

  - Mobile device friendly

  - Barcode scanning

  - Minimal manual entry.

- Expectations:

  - System simplifies their workload

  - Reduces errors

  - Improves day-to-day efficiency

3. IT Team Persona

- Secondary user:

    o Supporting role. Not needing to use the system besides to amend technical or process issues.

- Goals:

    o Implement all emcompassing inventory management system

    o System aligns with user needs and expectations

    o Ensure system uptime

    o Train users

    o Intuitive to use system interface and good user experience

- Skill Set:

    o High technical expertise in software implementation

    o System integration

    o Troubleshooting

    o Data management

    o Process engineering

    o Training end users

    o Collaboration with various individuals and teams to meet needs

- Tasks:

    o Design, deploy and support new system

    o Resolves technical issues

    o Train end users

- o Tasks are ongoing and essential for system functionality, especially during the initial launch of the system

- Relationships:

  - o Supports warehouse staff training

  - o Establishes clear deliverables with inventory managers, procurement team, finance team, and other adjacent administrative members

- Requirements:

  - o Administrative control

  - o Robust security features

  - o Collaboration with stakeholders to ensure all needs are met

- Expectations:

  - o Scalable system

  - o Easy to maintain system that

  - o Integrates with existing infrastructure, smooth user experience of implementation

4. Procurement Team Persona

- Secondary User:

  - o Not as frequent of a user of the system as primary users

  - o More reliant on deliverables than usability.

  - o Still provide important considerations to system output, particularly with respect to the procurement process.

- Goals:

- Access real-time inventory data to manage reordering

- Manage optimal inventory levels

- Skill Set:

  - Vendor management and relations

  - Purchasing

  - Familiar with inventory databases and reporting tools

- Tasks:

  - Review stock levels

  - Initiate orders

  - Manages vendor relationships.

  - Tasks are done periodically but are critical for maintaining supply levels. Effective reporting impacts business relationships

- Relationships:

  - Works closely with inventory managers, shop staff, and suppliers to establish orders with respect to current inventory and repairs in progress

- Requirements:

  - Reliable access to up-to-date inventory data

  - Low-stock alerts/reports

  - Visibility on repair progress and operations' equipment scheduling

- Expectations:

  - System with clear reporting tools

  - Real-time data conducive to proactive ordering

5. Finance Department Persona

- Secondary User:

  o Not as frequent of a user of the system as primary users. More reliant on deliverables than usability. Still provide important considerations to system output, particularly the financial metrics.

- Goals:

  o Financial reporting from inventory system

  o Optimize budget allocation

  o Inventory, and subsequent financial, forecasting based on reliable data

- Skill Set:

  o Financial analysis

  o Budgeting

  o Compliance

  o Familiar or proficient with industry standard financial management systems

  o Limited technical skills in inventory systems.

- Tasks:

  o Analyz inventory cost, reviews spending, and

  o Compliant with financial regulations

  o Financial tasks are performed monthly, quarterly. Furthermore, these tasks may be run at more frequent intervals for larger commercial project requirements.

- Relationships:

  o Works with inventory managers for data on stock value

  o Procurement team for budgeting

- o IT team for integrations and report revisions

- Requirements:

  - o Access to summarized inventory reports, especially for valuation and cost

    tracking

- Expectations:

  - o Accurate and easily accessible inventory reporting system to support financial

    analysis

6. Operations/Logistics Team Persona

- Status: Secondary User

- Goals:

  - o Optimize the assignment of equipment

  - o Reduce delays

  - o Maintain efficient inventory levels for smooth operations

- Skill Set:

  - o Logistics management and operations planning

  - o Moderate familiarity with inventory tracking systems

- Tasks:

  - o Plan and monitor the movement of equipment

  - o Coordinates with warehouse staff on repairs

  - o Track inventory to anticipate logistical needs

- Relationships:

- Works closely with warehouse staff and inventory managers to ensure timely order fulfillment

    - Works with procurement when necessary to maintain productive output

- Requirements:

    - Quick access to stock levels

    - Inventory/repair assignment data to coordinate logistics effectively

- Expectations:

    - Real-time, reliable, accessible data

    - Minimized disruption due to poor data integrity or inefficient repairs reporting

7. Suppliers/Vendors Persona

- Status: Tertiary User

    - As an outside stakeholder, they are not effected directly, however the deliverables from the company side must be accurate to maintain company relationships

- Goals:

    - Receive timely, accurate orders from the company and maintain a good supply chain relationship.

- Skill Set:

    - Product supply and order management.

    - Familiar with online vendor portals

- Tasks:

    - Fulfills orders

- o Tasks depend on company orders

- Relationships:

  - o Procurement team for order processing and delivery scheduling

- Requirements:

  - o Clear and consistent communication from the system regarding order volumes and timelines.

- Expectations:

  - o Timely, accurate orders with minimal back-and-forth communication

8. Regulatory Bodies Persona

- Status: Tertiary Stakeholder

  - o These entities should hopefully not be involved at all. Involvement would indicate an audit due to poor business practices.

- Goals:

  - o Ensure compliance with industry and safety standards, data protection, and reporting accuracy

- Skill Set:

  - o Knowledgeable in industry regulations and compliance requirements

- Tasks:

  - o Conducts periodic audits and reviews to ensure regulatory compliance.

- Relationships:

- o Coordinates with the finance department, HR, and the IT team for compliance audits

- Requirements:

  - o Needs access to clear records and reports which demonstrate compliance

- Expectations:

  - o Adherence to regulatory standards and cooperation during any audits

9. Anti-users:

- Implementation team members should try to identify anti-users. Anti-users are users who, either intentionally or unintentionally, stress test the system in a variety of ways. For example, a employee disgruntled with the new system implementation process may intentionally misuse the system. These users are valuable for user experience insights, identifying security vulnerabilities, and more.