User Personas

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To develop these personas I simply had to analyze the job positions at my place of work. Since I am conducting this research at my place of work I have easy access to the people who represent these personas. When needed I was able to easily reach out to these people to better understand their job roles, goals/responsibilites/tasks, skill sets, and involvement in the inventory management process. The personas from #5 (Finance department persona) onward have been excluded from the scope of the project for simplicity and to meet deadlines; they are not excluded from future developments should the business decide to pursue this system implementation.

1. Inventory Manager Persona: Stavros

- 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

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

- Skill Set:

  - o Inventory management experience

  - o Leadership/management, collaboration skills

  - o Budgeting and financially conscious

  - o Familiar with inventory softwares but not necessarily technically proficient

- Tasks:

  - o Regular updates to inventory records

  - o Inventory audits

  - o Repair audits

  - o Oversees reordering

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

- Relationships:

  - o Warehouse staff for inventorying and repairs

  - o Procurement team for reordering

  - o Operations/production teams for deployment and job assignment

  - o Finance team for budgeting

  - o IT team for system support

- Requirements:

  - o Reliability of data,

  - o User-friendly interface

  - o Integrates nicely with existing systems

  - o Basic training on new system

- Expectations:
    - System minimizes manual audit,
    - Real-time data tracking

2. Warehouse Staff Persona: Joshua

- 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

- o   Reports damaged goods and reports on repair process

- o   Assists in larger inventory audits

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

- Relationships:

  - o   Inventory managers for reporting and accuracy audits

  - o   IT team for system support

- Requirements:

  - o   Mobile device friendly

  - o   Barcode scanning

  - o   Minimal manual entry.

- Expectations:

  - o   System simplifies their workload

  - o   Reduces errors

  - o   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:

  - o Access real-time inventory data to manage reordering

  - o Manage optimal inventory levels

- Skill Set:

  - o Vendor management and relations

  - o Purchasing

  - o Familiar with inventory databases and reporting tools

- Tasks:

  - o Review stock levels

  - o Initiate orders

  - o Manages vendor relationships.

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

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

- Requirements:
  - o Reliable access to up-to-date inventory data
  - o Low-stock alerts/reports
  - o Visibility on repair progress and operations' equipment scheduling

- Expectations:
  - o System with clear reporting tools
  - o 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:

- Financial analysis

- Budgeting

- Compliance

- Familiar or proficient with industry standard financial management systems

- Limited technical skills in inventory systems.

- Tasks:

  - Analyz inventory cost, reviews spending, and

  - Compliant with financial regulations

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

- Relationships:

  - Works with inventory managers for data on stock value

  - Procurement team for budgeting

  - IT team for integrations and report revisions

- Requirements:

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

- Expectations:

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

6. Operations/Logistics Team Persona: Jim

- Status: Secondary User

- Goals:

  - Optimize the assignment of equipment

  - Reduce delays

  - Maintain efficient inventory levels for smooth operations

- Skill Set:

  - Logistics management and operations planning

  - Moderate familiarity with inventory tracking systems

- Tasks:

  - Plan and monitor the movement of equipment

  - Coordinates with warehouse staff on repairs

  - 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

    o As an outside stakeholder, they are not effected directly, however the deliverables

    from the company side must be accurate to maintain company relationships

- Goals:

    o Receive timely, accurate orders from the company and maintain a good supply

    chain relationship.

- Skill Set:

    o Product supply and order management.

    o Familiar with online vendor portals

- Tasks:

    o 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.