Christina Mendosa

CFO, Group of different companies

Female | 40 years   Ambitious , in nature

SIGNATORY - APPROVES PAYMENTS

Primary Objectives

1. Approve pending transactions
2. Check the Status of transaction
3. Checking Account Balances
of his companies

Needs/Goals

1. To be able to authorize payments
anywhere, anytime, on the go.
2. Relevant Notifications
3. Quick & Efficient way of communication
4. Bulk Authorization pf payments
5. Transparency on the status of payments
6. Time Out during approving to be increased
7. Easy & Safe access to Web App
8. Notify me when there is a pending transaction.

Pain-Points

1. Difficulty in recognizing payments
without beneficiary names.
2. Unable to validate transactions on the go
3. System does not provide with guidance

Her Motivations

Ease of Use
Proper Guidance & Transparency

Her Goal

" I want to be able to authorize transactions efficiently when I am travelling"

Preferred Devices

Digital Comfort

Low   High

Primary Objectives

1. Check Invoices from suppliers
2. Facilitating Trade Financing
3. Initiate international payments

Needs/Goals

1. Counter check payment instruction with the invoice
2. Need to easily communicate with the signatory
3. Transparency on initiated payments
4. Wants to make optimum use of his time at work
5. Bulk Initiation of Payments
6. Wants to see Negotiated Rate for a Transaction

Pain-Points

1. Inability to upload invoices
2. No indication on the number of pending payments for authorization.
3. System takes a long time to search for beneficiaries
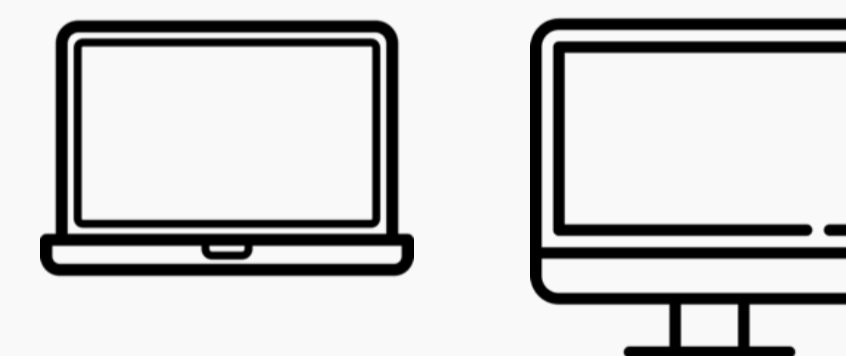4. Lack of Transparency

His Motivations

Ease of Use
Eagerness for incentives
Professional Growth

His Goal

" I want to be able to seamlessly initiate transactions with minimal errors and remain updated on the status of transactions"

Preferred Devices

Digital Comfort

Low   High

Smith Amenda

Accountant

Male | 30-40 years   Analytical, in nature

INITIATOR - INITIATES PAYMENTS

IB User, works for a Global Business or Corporate Company