

Elena, the Aspiring Savvy Saver

Demographics

Age: 28

Location: Urban area, Seattle, WA

Education: Bachelor's degree in Communication

Occupation: Junior Marketing Specialist

Income: \$45,000 per year

Psychographics

Lifestyle

Elena is tech-savvy and socially active, enjoys exploring new technologies that can simplify her daily life.

Behavior

She is cautious with her spending due to her moderate income but is eager to learn about and start investing.

Goals

Wants to manage her finances better, save for a down payment on a condo, and start building a retirement fund.

Challenges

Feels overwhelmed by the complexity of financial planning and investing.

Technology Usage

Frequent user of smartphone apps for managing lifestyle tasks like banking, social media, and shopping.

Comfortable using technology to solve problems and improve efficiency.

Jobs to Be Done (JTBD) for Elena

Simplify Financial Management	Elena needs a way to manage her finances without feeling overwhelmed by the complexity of financial terms and options.
Learn and Grow Financially	She wants to understand basic investing principles so she can start investing with confidence.
Save for Specific Goals	Needs tools to help her save effectively for big purchases, like a condo, while also setting aside money for long-term goals like retirement.

Empathy Table for Understanding Elena's Journey

Stage	Think	Feel	Do
Awareness	"I know I should be managing my money better."	Overwhelmed by options, uncertain	Starts searching online for financial tools
Consideration	"This tool could simplify things, but can I trust it?"	Curious but cautious	Reads reviews, compares different apps
Decision	"I need something that grows with my needs."	Hopeful, ready to take control	Chooses a robo-advisor, signs up for a trial
Adoption	"How can I maximize the benefits of this tool?"	Excited, eager to learn and apply	Engages with the platform daily, sets up goals
Advocacy	"This app has really helped me save and invest."	Satisfied, confident	Recommends the tool to friends, leaves re