

## Sam Baxter



“Technology puzzles me sometimes.”

### Personal Profile

Sam has been at <client> for 10 years. He made it to the president’s club for 7 out of those 10 years. Prior to becoming a retirement services rep, he was a financial planner. He knows <client> product offering practically inside and out and his pitch is automatic. Making cold calls is “tough, very difficult”, but the thrill of the chase keeps him going.

When he makes it into the office his day is pretty routine, and very busy. He often switches tasks because he “can’t just call people for three hours.” His performance is measured by a combination of management reports based on data from his roll call, number of units, present to quota, and his minimum of 15 activities per week. So, when not making calls or following up on emails, his day consists of reviewing spreadsheets and entering loads of information into different knowledge bases. Each attempt to contact someone must be logged and detailed.

His appointments are scheduled whenever the prospect is available. The only real consideration is optimizing the travel time required by attempting to schedule appointments near each other.

### Background

- 48 Year old married man
- 15 year old son and 12 year old daughter
- Knows <client> retirement services products intimately
- Used to be a financial advisor
- Licensed broker (Series 7, 63)
- Has no idea what the motivational banner in the lobby refers to
- Does most of work in the office as opposed to plugging in on the road
- Life is in his tablet computer and in his analog datebook
- Work week pretty structured - works off of To Do check-lists and downloads myriad status reports
- Received BA in Business Administration
- Works in a professional building
- Small cubicle he visits three days a week

### Attributes

- Older
- Male
- Hates change
- Competitive
- Ample retirement funds
- Moderate income
- Experienced with investing
- Advanced Beginner with the internet
- Short attention span
- Prefers “sum it up” over “describe in detail”

### Office Environment

- Small cubicle
- Pictures painted by his kids
- Pictures of his kids
- Pictures of the sales rally in Las Vegas
- Stacks of papers and proposals “ask me for something and i’ll find it in a second.”
- Small tablet computer
- Tiny mouse
- Several memos and often visited urls posted to cubicle walls
- Drawer of manilla folders for each client and prospect
- Flourescent lighting
- Black and white sharerd laser printer
- Rarely visited mailboxes - receives new sales materials occaisionally
- Manager offices along perimeter

### Needs

- Simple
- Reliable messaging that tells him what he did wrong
- Fast and to the point
- Smart technology - “We’re busy and we make mistakes”

### Why technology sometimes puzzles Sam

“I went to that FedEx site where you can print out the shipping label and i gave up a few screens in. There was some error happening and it wouldn’t tell me what it was. It suggested that I call FedEx. I just write them by hand now.”

“I had trouble uploading data to the Smith Barney site. After two days of frustration i reached someone in their technical support and they told me that i used a comma instead of a colon in one entry. Please make this tool smart.”

### Favorites on tablet PC

- FreeErisa.com - Information on companies current 401(k) plans. Public knowledge filings.
- PlanSponser.com - News, information, tools and services for retirement industry professionals. Gets newsletter and reviews it every day.