

Your Customer Persona

Sample Business: Clear Vision Accounting

Expert AI Prompts
Step 1 of 3 • Business DNA Builder

SAMPLE OUTPUT

How this document was created: The owner of Clear Vision Accounting ran the Customer Persona prompt from the Business DNA Builder, answered the AI's targeted interview questions one-by-one, and received this complete persona document in under 8 minutes. No editing required — this is the raw AI output.

SECTION 1

Persona Overview

Meet "Frantic Frank" — a 45-year-old owner-operator of a plumbing business with 5 staff in south-east Queensland. Frank is brilliant on the tools and great at winning jobs, but the financial side of the business is a permanent source of anxiety. He knows he needs a better accountant — every firm he's tried has felt the same: reactive, hard to reach, and full of surprise bills. Frank doesn't want a complicated new system. He wants one trusted person who handles the numbers so he can focus on what he's actually good at.

SECTION 2

Demographics

Age	35–55
Location	Brisbane, Gold Coast, Sunshine Coast (SE Queensland)
Revenue	\$180,000–\$500,000 annual business turnover
Education	Trade certificate, diploma, or equivalent practical experience
Role	Owner-operator; 1–10 employees
Industry	Trades (plumbing, electrical, HVAC), retail, allied health

SECTION 3

Psychographics

- **Values:** Reliability above everything. Clear communication, no jargon, no surprises in fees or advice.
- **Beliefs:** His accountant should call him — not the other way around. Proactive advice is non-negotiable.
- **Lifestyle:** 50–60 hour working weeks. Family time is finite and sacred; financial admin eats into evenings and weekends.
- **Personality:** Pragmatic, direct, slightly sceptical of anyone who doesn't understand the trades. Deeply loyal once trust is earned.
- **Pain trigger:** An unexpected invoice from his accountant for work he didn't approve.

SECTION 4

Behaviours

- **Task priority:** Customer jobs first, admin second, financial strategy never — unless forced.
- **Current accountant:** National franchise chain. Sees the same accountant once a year at tax time. Feels like a file number.
- **Tech habits:** Uses Xero for invoicing only. Has never set up bank reconciliation rules or looked at a P&L;
- **Buying behaviour:** Buys on peer recommendation and verified Google Reviews. Extremely loyal once trust is established.
- **Decision trigger:** An ATO penalty notice, a cash flow crisis, or a trusted colleague saying "you have to call my accountant."
- **Research behaviour:** Googles "best accountant for tradies Brisbane," reads the first three listings, calls two of them.

SECTION 5

Challenges & Pain Points

- **BAS panic:** Every quarter is a scramble. Missing receipts, unreconciled accounts, and a looming deadline create a wave of dread.
- **ATO penalties:** Has paid \$800–\$1,500 in late-lodgement penalties in two of the past three years.
- **Financial blindness:** Makes major decisions (hiring, equipment) on gut feel because he has no real-time P&L; data.
- **Reactive accountant:** Current firm processes what Frank gives them. They never reach out first.
- **Surprise bills:** The last straw is always an unexpected invoice for something he didn't approve or understand.
- **Inconsistent records:** Mixes personal and business expenses. No system for tracking deductions throughout the year.

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SECTION 6

Needs & Wants

NEEDS — Non-Negotiable	WANTS — Desired Outcomes
Frank needs a dedicated accountant who knows his business by name, not file number. He needs fixed-fee monthly bookkeeping, BAS lodged on time every quarter, same-day responses when he has a question, and zero surprise invoices — ever.	Frank wants to open his phone and see a live P&L.; He wants a proactive call when his cash flow dips below a healthy threshold. He wants a straight answer on whether he can hire an apprentice this month — and he wants to reclaim the evenings he currently spends on admin.

SECTION 7

Brand Interaction & Objections

Primary Objections

- *"I've been burned by accountants before. They take the money and I never hear from them."*
- *"Fixed fee sounds great — but what's actually included? I always get charged extras."*
- *"Switching mid-year seems risky. Is it going to be a nightmare to transition?"*

How Frank Engages With Your Brand

- **Show, don't tell:** Frank responds to specific client results ("We saved a Brisbane plumber \$1,400 in ATO penalties in year one"). Generic claims bounce off him.
- **Peer proof:** A testimonial from another tradie carries 3x the weight of a professional endorsement.
- **Free first step:** A no-commitment financial health check eliminates purchase friction and proves competence before commitment.
- **Clear scope:** Publishing exactly what's included in each plan removes the "surprise extras" objection before it's raised.

SECTION 8

Goals & Motivations

Business Goals

- Grow revenue from \$300K to \$500K within 24 months by systematising operations.
- Hire one additional apprentice in the next 6 months — pending a confident cash flow forecast.
- Build systems that allow Frank to step back from day-to-day operations within 5 years.

Personal Motivations

- Stop working evenings and weekends on admin — that time belongs to family.
- Take a 2-week holiday without anxiety about what's happening in the accounts.
- Feel confident — not anxious — when an ATO letter arrives.

SECTION 9

Direct Quotes & Statements

"My last accountant just processed what I gave them. I need someone who actually helps me run the business."

"I missed a BAS deadline last year and paid \$1,200 in penalties. That cannot happen again."

"Can I afford to hire another apprentice this quarter? Just tell me yes or no."

"I don't need the tax law details. Just tell me what I owe and when to pay it."

"I've been with my current accountant for 4 years and I don't think they'd recognise me if I walked past them."

SUMMARY

Customer Persona Summary

Frank represents thousands of Australian trades business owners who are operationally excellent but financially under-served. He is not looking for the cheapest accountant — he is looking for the last accountant he will ever need to change. He will pay a fair fixed fee without hesitation if the value is clear and the relationship feels personal. The single most powerful sentence you can say to him is: *"We call you — you won't have to chase us."* That one line removes his three biggest objections simultaneously. By

solving his BAS panic, eliminating financial blindness, and treating him as an individual rather than a file number, Clear Vision Accounting is not just selling accounting services. It is selling financial confidence, reclaimed evenings, and the ability to grow without fear.