

AI'ssist Book Pros Client Persona

1. Stephanie Edwards - Cafe Sweet Crown Owner



"I love running my café. I just want simple answers that help me make more money and worry less."

Age: 42

Location: Brooklyn, NY

Education: Associate in Social Work

Income: \$30,000 after tax/expense, receives support from her family

Values: Courtesy and Creative

Needs/Wants: Would like to make her business profitable to send her son (currently 14) to college

Concerns: The business requires marketing strategy but not enough resource

Challenges: Cannot hire extra people to do administrative work

A Day in the Life

- Opens her café, manages staff (family) schedules, and greets regular customers
- Handles inventory and supply orders while juggling customer service
- Jots expenses on scraps of paper or saves receipts in a shoebox for "later"
- Posts a few pictures on Instagram/Facebook to promote her café, but inconsistently
- Stays late doing basic bookkeeping and worrying about bills instead of relaxing with family

Online Behaviors

- Scrolls Instagram and Facebook for inspiration and local community updates
- Googles "how to grow my café business" or "cheap marketing ideas" but feels overwhelmed
- Watches quick YouTube tutorials about small business tips, but rarely follows through

What She's Looking For

- A simple, affordable way to keep her numbers organized
- Practical guidance that saves her time and helps her café become more profitable

What Influences Her

- Recommendations from friends and other local small business owners
- Trustworthy voices from her community center or neighborhood networks

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Hopes and Dreams

- Grow Café Sweet Crown into a well-known neighborhood spot
- Earn enough profit to send her son to college without debt
- Feel confident and in control of her business, instead of constantly “catching up”

Worries and Fears

- Falling deeper into debt if she can't improve her cafe's financial health
- Losing precious time with her son while always “working on the business”

What Makes Her Life Easier

- Tools and services that organize receipts, expenses, and sales trends automatically
- Someone who can translate numbers into plain English without jargon
- Affordable support that feels like a partner, not just another bill
- Quick wins she can see and feel right away (e.g., saving money on supplies or labor hours)

2. Adam Martinez - The Tradesperson (Plumber / Hardware Shop J&M's Hardware Owner)



"I know how to fix pipes, but these numbers and receipts? They give me more headaches than the plumbing ever did."

Age: 52

Background: Immigrant from Ecuador, took over hardware store in Sunset Park, Brooklyn from former Polish owner and running it for nearly 20 years

Income: ~\$60k, modest margins

Values: Reliability, family support, reputation in community

Pain Points: Struggles with inventory tracking, cash vs. card reconciliation, and managing seasonal demand

Needs: Wants simpler tools to track supply costs, schedule employees, and avoid waste

A Day in the Life

- Opens his hardware store early, restocks shelves, and greets contractors and neighbors
- Answers phone calls about plumbing parts and gives advice on fixes

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- Tracks inventory in a paper notebook and mental notes, but often forgets to reorder until low
- Handles cash and card payments, struggles reconciling the register at night
- Closes shop late, brings leftover bookkeeping home, and shares dinner with family

Online Behaviors

- Facebook for Marketplace to find reasonable parts
- Watch YouTube and TikTok when people send him the link (in Spanish mostly)

What He's Looking For

- A simple way to manage inventory and cash flow without complicated software
- Affordable support that saves time so he can focus on customers, not paperwork

What Influences Him

- Recommendations from long-time customers and fellow shop owners in the neighborhood
- Trust built through family, church, and community networks

Hopes and Dreams

- Pass J&M's Hardware down to his son or keep it thriving as a family business
- Modernize operations without losing the "old-school" neighborhood vibe
- Gain more free time to spend with grandchildren and enjoy semi-retirement in a few years

Worries and Fears

- Competition from big-box stores and online retailers taking away business
- Rising costs and mismanaged finances leading to the store's decline

What Makes His Life Easier

- An easy-to-use system that tracks inventory and sales automatically
- Clear reports showing which products sell best in each season
- Tools that help balance cash and card payments seamlessly
- Local, trusted partners who can explain things without jargon

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3. Rachel Khan - Solo Creative+Freelancer



"I can design a brand for anyone, but when it comes to my own numbers, I just wing it."

Age: 34

Location: Bedstuy, Brooklyn

Occupation: Runs a boutique design studio from home (branding, flyers, social media graphics, and small website builds for local businesses)

Background: First-generation Pakistani-American

Education: BSc in Media Studies from College in Maryland

Income: ~\$40k fluctuating by project load

Values: Independence, creativity, reputation

Pain Points: Struggles with quoting jobs, tracking hours, sending invoices, and understanding cash flow

Needs: Wants to learn financial clarity and time-tracking without hiring an Accountant

A Day in the Life

- Works from home or at cafés, balancing design projects for local businesses
- Checks her "Listings Project" emails for freelance gigs, artist residencies, and sublet opportunities
- Pitches small branding packages to restaurants, nonprofits, and neighborhood shops
- Tracks hours loosely on paper or free tools but often forgets
- Stresses about late payments and juggling client negotiations

Online Behaviors

- Subscribes to Listings Project for job leads
- Uses Instagram and Behance to showcase her portfolio
- Joins Facebook artist groups for collaboration and referrals

What She's Looking For

- A simple way to quote, track, and invoice without losing money
- Financial clarity tools that don't feel like "accounting"

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What Influences Her

- Fellow creatives sharing advice and resources
- Affordable tools promoted through creative communities

Hopes and Dreams

- Build a steady client base and stop chasing late invoices
- Grow into an independent studio with one or two collaborators
- Save enough for a larger apartment or live/work studio in Brooklyn

Worries and Fears

- Burnout from unstable income cycles
- Losing credibility if her finances look unprofessional

What Makes Her Life Easier

- Automated invoicing and reminders for late-paying clients
- Tools that track hours seamlessly while she works
- Someone to translate her financials into "plain English"

4. Mona Burrell - Hair Salon Sleek Stream Owner



"I can make anyone feel beautiful in my chair — I just wish running the business part was that easy."

Age: 45

Location: Crown Heights, NY (moved from Bushwick)

Background: Opened a hair salon, "Sleek Stream" with her aunt, who retired 2 years ago. Now running it solo.

Education: Associate in Childhood Education from BMCC

Income: \$40k~/year (after loan repayment)

Values: Beauty, loyalty, God first

Needs/Wants: Would like to make her business profitable and pay off debt owed to her aunt and bank

Concerns: She wants to make her business profitable but doesn't want to pay extra

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A Day in the Life

- Opens the salon mid-morning, manages walk-ins and loyal clients
- Oversees two part-time stylists, struggles with scheduling and payroll fairness
- Spends downtime ordering supplies and cleaning the shop
- Handles payments in cash and through Zelle/Venmo, often mismatched in records
- Closes shop tired, but stays up reviewing bills and thinking about loan payments

Online Behaviors

- Uses Instagram and TikTok to showcase styles and attract clients
- Reads Yelp and Google reviews, both hers and competitors
- Watches YouTube tutorials on new styling techniques and small biz tips

What She's Looking For

- A way to manage appointments, staff hours, and payments without extra admin costs
- Affordable support that helps her increase profitability while paying off debt

What Influences Her

- Loyal client feedback and word-of-mouth referrals
- Advice from church and close family

Hopes and Dreams

- Build her salon into a recognized beauty spot in Crown Heights
- Pay off debts and gain financial freedom
- Eventually expand services (e.g., nails, spa treatments) or open a second location

Worries and Fears

- Losing clients to trendy new salons or barbershops
- Falling behind on loan payments and risking her aunt's trust

What Makes Her Life Easier

- Tools that schedule clients and staff seamlessly
- Systems that keep track of cash + app payments without errors
- Insights on which services/products are most profitable
- A trusted advisor who explains business health in clear terms