Primary School Business Manager (SBM) Persona

Mindy Chowdhury

Overview

Mindy is a key leader in looking after the school's financial health and operational excellence.

Her role encompasses strategic planning, financial oversight, compliance, and being a trusted advisor to the headteacher and governing body. Mindy also picks up HR responsibilities for the admin team.

School Setting: A local authority-maintained primary school with 200+ pupils, including high proportions of pupil premium students.

Key aspects

Category	Information
Personal traits:	- Analytical - Attention to detail - Experienced in diverse fields - A problem-solver
Current priorities	- Maintaining a balanced budget while addressing increasing costs. - Raising attendance and academic achievement. - Preparing for potentially joining a trust and long-term financial sustainability.
Goals	- Support school improvement through streamlined processes and innovative ways of working. - Save school time and money by upgrading operations and reducing waste. - Build a resilient and compliant admin framework that supports educational excellence.

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Technology challenges	- Currently using SIMS with interest in transitioning to cloud-based MIS like Arbor. Is looking to benefit from better reporting and track absences better. - Manual data reporting processes and inconsistent data are slowing Mindy and the team down. - Uses MIS system and spreadsheets to cover HR responsibilities.
Skills	**Technical** - Advanced knowledge of financial management, budget planning, and procurement. - Proficient in MIS platforms. - Knowledge of compliance standards in health, safety, and safeguarding. **Leadership and management** - Effective decision-making, balancing diverse stakeholder needs. - Ability to lead and inspire teams while managing change effectively. **Communication and procurement** - Strong verbal and written communication for clear and concise reporting. - Skilled in negotiation to secure favourable contracts and partnerships. **Problem-solving** - Proactive in addressing challenges, from budget constraints to unexpected daily school crises.

Demographics

- **Age range:** 30 - 40 years old
- **Gender:** Female
- **Hobbies and interests:** Running and getting outdoors with her dogs.

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Career Background

- **Education background:** Mindy attended university and has a marine biology degree. Previously, Mindy worked at Sea Life Aquarium as a marine biologist, then transitioned to administrative roles in schools.

- **Peer to Peer:** Likes to connect with peers in person and loves events.

Challenger framework type

- **Value intellectual challenge:** Mindy appreciates insightful conversations and enjoys learning new thing**s.**

- **Data-driven:** She values evidence and data-backed arguments.

- **Views:** Mindy has the mentality that all cloud-based MIS platforms have the same functionality and capability within the platforms' UI as old systems. Unaware that it has more than just cloud-based capabilities.

Decision-making and buying influences

- **Decision-making authority:** Mindy is influential in the decision-making group, especially regarding the budgeting for school-level purchases. She manages the procurement process for the school.

- **Mindy's influencers:** Senior leadership team, the Headteacher and feedback from admin and teaching staff.

Communication Preferences

- **Preferred Channels:** Email, events and word of mouth.

- **Valued Content:**

  - Solution comparison documents

  - Testimonials

Key Insights:

- Mindy values ease of use and systems that can deliver high efficiency in everyday tasks.

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- Modern tools that address specific needs, such as HR functionality and improved reporting, are highly desirable.
- Expresses the need for advanced data analytics
- Arbor's focus on solving operational pain points is seen as a key differentiator, but expectations must be managed to ensure realistic outcomes.

Note

This persona is based on qualitative research from SBM interview. It is also built from interview research from The Key Group and Arbor sales team knowledge.

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