



Understanding our ICP starts here

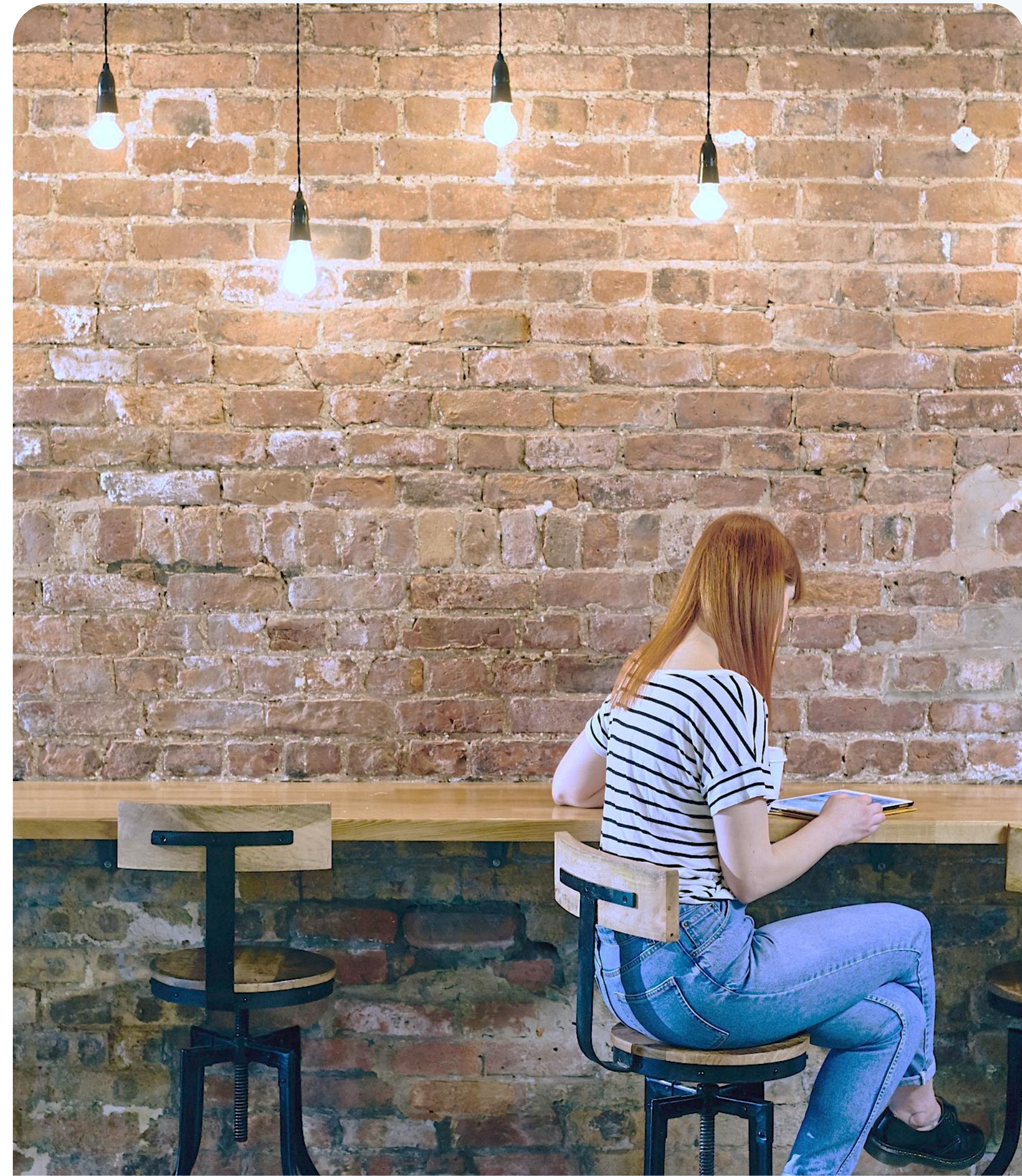
Accrue Customer Profiles



Meeting Agenda

Today's Topics:

- Ideal customer profile overview
- Accrue's 3 profiles
- Profile deep-dives
- Buyer journey mapping



What is an Ideal Customer Profile?

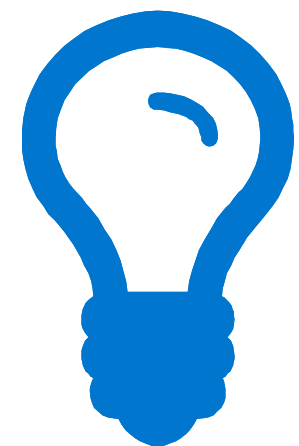
An Ideal Customer Profile (ICP) defines **the perfect customer for your product or service** based on real data and insights, including characteristics such as:

- Industry
- Company size
- Location
- Pain points
- Needs
- Buying behavior



Why ICPs Matter

- **Focused Marketing:** Target the right audience with messaging that resonates.
- **Efficient Sales:** Spend time on leads most likely to convert and succeed.
- **Higher ROI:** Maximize resources by attracting high-value, long-term customers.
- **Stronger Product Fit:** Build solutions tailored to real customer needs.
- **Better Alignment:** Keep marketing, sales, and product teams working toward the same goals



Knowing your ICP means working smarter—not harder.

Accrue's 3 Customer Profiles

Small: 10–25 Employees

- 3-4 location retail
- 1-2 location restaurant
- Local construction
- Local home services
- Local financial services
- Local salon and spa
- Local healthcare
- Single location auto repair

Medium: 26–50 Employees

- 5-10 location retail
- 3-5 location restaurant
- Regional construction
- Regional home services
- Regional financial services
- Regional healthcare
- Single warehouse wholesale
- Local automotive dealership
- Multi-location auto repair
- Franchisees

Large: 51–100 Employees

- 10-15 location retail
- 6-9 location restaurant
- Regional construction
- Multi-region home services
- Multi-region financial services
- Multi-region healthcare
- Multi-warehouse wholesale
- Regional automotive dealerships
- Franchise owner

WIP

What Are We Selling

Accrue Payroll & HR is comprised of a suite of products that meet our ICPs needs





Small Segment





Small Segment 10–25 Employees

Who are we selling

Ideal Customer Profile

- 3-4 location retail
- 1-2 location restaurant
- 10-25 employees
- \$1-2MM in annual revenue
- Industry examples:
 - Restaurant/Retail
 - Local home services
 - Local financial services
 - Local healthcare

The business needs:

A system that's simple, compliant and saves time

The business values:

Personal service, ease of use, and reliability

The business owner wants to:

Pay people, stay out of tax trouble, and grow responsibly

Why are we selling them?

Insights on known issues that exist

- Payroll is too manual and prone to error
- No visibility into labor cost or time off
- New hire onboarding lacks structure
- Owners fear IRS penalties but don't have expertise

Perspective on potential issues that would impact the Target or Stakeholder

- A growing team without infrastructure leads to errors, lack of productivity, and burnout
- Errors in tax filing create trust issues with employees
- Employees expect mobile access and transparency
- Managers spend too much time answering questions

Current systems managed by CPA/Bookkeeper

- Excel spreadsheets
- QuickBooks Payroll

What are we selling them?

Primary Offerings

- Accrue Payroll + HR
- Tax filing & compliance automation
- Affordable, error-free payroll

Accrue Distinctions

- Payroll + HCM built for small business
- Built-in tax compliance & tax credit screening (WOTC)
- Responsive human support
- Local expertise
- Broker and CPA Friendly

Accrue Competition

- Gusto | Paylocity | Rippling

How are we selling?

Listen vs. Talking

- What's the worst payroll error that has happened and how did your employees respond"
- "What's the most difficult part of payroll for you right now?"
- "Who usually handles employee questions about time off or pay?"
- "Have you ever missed a filing deadline — or worried you might?"

Tying a solution to a concept

- Focus on the difference between data entry and decision making (where you spend your time)
- Show how automation and mobile access free up their time and reduces stress
- Describe how we give owners control & visibility while providing managers and employees easy access to all things payroll + HR

Looking for alignment

- Get a walkthrough of their current process
- Ask how they handle compliance and onboarding
- Identify what parts of payroll stress them out most

Action Commitments

- Schedule demo with both Champion/Decision Maker
- Share tax/compliance checklist to compare features
- Invite CPA or Bookkeeper into decision process

They're not looking for a platform — they're looking for peace of mind.



Was this sales play successful?

- Owner committed to pilot
- Bookkeeper approved
- CPA confirmed tax compliance



Maggie Hall, 52

Champion
Small Profile

Company:
Oak & Vine Landscaping

Business Role:
Operator/Office Manager

“If the system slows us down,
it’s the wrong system.”



Business Goals
I want to get paid on time, see my schedule without asking, and spend less time messing with paperwork.



Responsibilities
I want to free up my time, give our team a better experience, and keep everything running smoothly during peak seasons.

- Daily operations
- Answering the phone
- Employee onboarding and terminations
- Addressing employee questions
- Running payroll and tracking time



Tech Understanding
I can learn anything — if you show me why it matters and keep it consistent.

- iPhone 14
- Windows 10
- Relies on Facebook/spreadsheets
- Uses Pinterest, Instagram and YouTube

Pain Points

Managing payroll with spreadsheets wears me down. It takes forever. I worry I'm missing things.

- Time consuming manual payroll processes
- Payroll accuracy, tax compliance, and deadlines
- Frequent questions about pay, PTO, and schedules
- No standardized process for employee onboarding
- Managing budget

Needs

We're growing. I need a platform that makes managing people easier — not harder.

- Fast employee setup and offboarding
- PTO tracking and schedule visibility
- Error-free payroll workflows
- A real person to help when something breaks
- Set-up assistance and simple U/I

Influencers

I rely on my inner circle to validate what we should adopt — in this order:

- George (Owner)
- Bookkeeper or CPA
- Other business operators I trust
- Business Facebook groups

Current Behaviors

Search Behaviors



I use Google to research products that I've heard others mention. I also go to competitor’s sites to see what their up to.

- Awareness: hears about tools from local business managers
- Consideration: Used keywords like payroll for small business & related searches. Reads reviews and watches videos.
- Decision: Compares 2-3 platforms based on features, support and price
- Starting to use ChatGPT

Social Behaviors



I use Facebook to stay connected with coworkers and follow a few business groups.

- Facebook account, occasional poster, business group member
- Doesn't use LinkedIn
 - Watches YouTube for software tutorials and walkthroughs

Buying Behaviors



I don't have final say on spend, but I strongly influence what we use. If I don't like the experience, we won't stick with it.

- Hasn't used an HCM/payroll system before
- Works within operational budget
- Prefers all-in-one tools over piecemeal systems
- Avoids complexity at all costs

Content Behaviors



I run a newspaper ad every month and send a quarterly postcard to local zip codes.

- Reads postcards and local newspapers
- Watches YouTube videos
- Will attend a webinar if it directly relates to her role
- Doesn't read blogs or long form
- Reads customer reviews

Empathy Map

Thinking

I know we've outgrown our current systems — I need something that helps me manage people, not just pay them.

Feeling

I'm constantly playing catch-up. I need help but don't want to make a change that slows us down.

Seeing

Our payroll and scheduling tools are clunky, and I see other businesses automating everything.

Doing

I'm working around bad systems, re-entering data, and answering the same employee questions every week.

Key Takeaway

I keep this place running. Help me get some time back.

Communication Do's and Don'ts

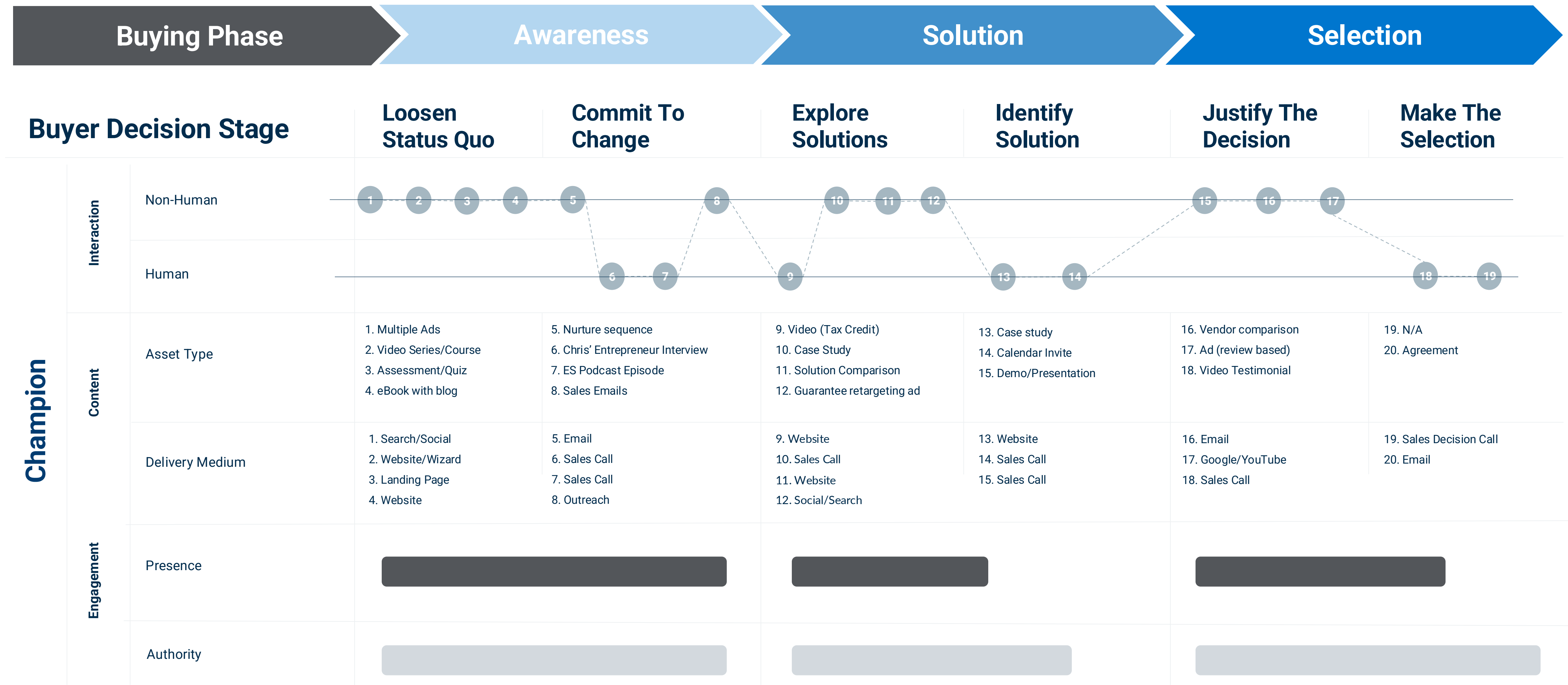
Do

- Show me how it works in real time
- Respect my time
- Speak in plain language
- Help me solve actual daily problems

Don't

- Talk down to me
- Overcomplicate the pitch
- Pressure or rush me
- Oversell me on features

Small Profile | Champion | Buyer’s Journey Map





George Hall, 57

Decision Maker

Small Profile

Company:

Oak & Vine Landscaping

Business Role:

Owner

"I don't need bells and whistles — I need something that works and won't disrupt the business."



Business Goals

I want to protect the business I built, grow smart, and use systems that make things easier for the next generation.



Responsibilities

I'm responsible for the success and future of this business. I wear most of the hats.

- Payroll and staff management
- Compliance and taxes
- Cash flow and budgeting
- Approving software and vendors



Tech Understanding

I can get around most systems, but I don't want anything that needs handholding.

- Phone 12
- Windows desktop with QuickBooks
- Prefers platforms that rarely change
- Familiar with Excel & basic scheduling tools
- Wants phone support when needed

Pain Points

It's getting harder to run things manually, and I'm constantly worried about dropping the ball on something important.

- Payroll/HR processes that aren't scalable as biz grows
- Worried about making a tax/filing mistakes
- Hiring seasonal workers is inconsistent and chaotic
- No centralized way to see hours, PTO, or labor costs
- Relying too much on key staff (like Maggie)

Needs

I need a simple, reliable system that handles payroll, taxes, and onboarding so I can focus on running the business so it's here for my grandchildren.

- A dependable payroll/HR system — no babysitting
- Built-in tax filing and compliance tools
- Easy setup for part-time or seasonal employees
- Live support from someone who gets SMBs
- Centralized visibility into payroll and HCM activities

Influencers

I check in with people I trust before making a decision — especially those who understand my business.

- Maggie (Office Manager)
- Sheila (CPA)
- Peers/Trusted Local Business Owners
- Associations/Tradeshow contacts

Current Behaviors

Search Behaviors



I search online for solutions after hearing about them from people I trust. Or, if I notice a problem, I'll Google to see if I can find a solution.

- Awareness: comes from peers and vendors I already work with
- Consideration: Google searches like "easy payroll for small business"
 - Scans vendor websites and reviews
- Decision: Post demo/quote, consults Maggie and Sheila before finalizing a choice. Reviews pricing.

Social Behaviors



I check Facebook a few times a week and read comments in business groups.

- Rare Facebook poster, follows landscaping business threads
- LinkedIn account exists but isn't used
- Watches YouTube for equipment demos and business stories

Buying Behaviors



I keep things lean, but I'll spend when something clearly saves time and lowers risk.

- Doesn't jump on trends. Values consistency over novelty.
- Will invest if convinced it solves a specific business problem
- Wants flexibility without getting locked into something messy

Content Behaviors



I prefer information that's short, honest, and easy to understand.

- Follows a couple trade publications
- Reads FAQs and side-by-side comparisons
- Watches short demos or interviews with business owners
- Avoids anything that feels too pushy or over-engineered
- Doesn't like downloading things to read later — wants it now

Empathy Map

Thinking

There must be a better, more efficient and accurate way to manage payroll and employees than spreadsheets and crossed fingers.

Feeling

Cautiously optimistic — This is a big change. I want to make a smart investment, but I don't have time or money to waste.

Seeing

Payroll problems in the past bubble up to me that shouldn't have happened. In this day in age, we need a solution that will save me, and my team, time and money.

Doing

I trust my team, but I'm going to look at vendors, review case studies, and talk to peers before we make the move.

Key Takeaway

I need a reliable tool that empowers my managers and employees.

Communication Do's and Don'ts

Do

- Talk to me like a business owner, not an IT manager
- Show real numbers and time savings
- Be honest about costs
- Give me examples from businesses like mine

Don't

- Pressure me to move fast
- Use industry jargon
- Dance around the price
- Promise the moon — I won't buy it



Tyler James, 46

Influencer
Small Profile

Company:
Oak & Vine Landscaping

Business Role:
Bookkeeper

"If I'm cleaning up the numbers every payroll cycle, something's wrong."



Business Goals
I want clean books, fewer surprises at tax time, and tools that don't need me to be a full-time IT guy.



Responsibilities
I keep the financials clean and help avoid costly mistakes. If the numbers are wrong, it lands on me.

- Running payroll & checking deductions
- Maintaining QuickBooks records
- Prepping tax docs for the CPA
- Auditing hours, pay rates, and PTO



Tech Understanding
I'm very comfortable with accounting software and know how to troubleshoot—but I prefer clean over clever.

- Uses QuickBooks, Excel, Dropbox, Gmail
- Knows how to build templates & formulas
- Prefers tools with clear data visibility
- Avoids systems that hide logic or automate without tracking

Pain Points

I'm constantly cleaning up after tools that weren't built for real accounting workflows.

- Payroll inputs come from too many sources
- Manual entry causes reconciliation errors
- Lack of audit logs or permission controls
- Too much back-and-forth with outside vendors

Needs

I need accurate, exportable data from a platform that makes compliance easier — not harder.

- System that integrates easily with QuickBooks
- Clear record of adjustments and permissions
- Tax form generation and deadline reminders
- Easy data exports and clean reports

Influencers

I lean on professional input from others in the finance world.

- Sheila (CPA)
- Owner or GM
- Other bookkeepers in my network
- Vendor support teams I've worked with before

Current Behaviors

Search Behaviors



I Google things multiple times a day. If I don't know the answer to something, I tend to look it up.

- Awareness: Word of mouth, usually from peers
- Consideration: Searches "payroll that syncs with QuickBooks"
- Decision: post demo/quote
 - Brings recommended options to business owner

Social Behaviors



I mostly use Facebook. Although, I'm part of a couple accounting groups on Facebook and follow relevant tags on LinkedIn.

- Facebook group member, passive participant
- Active LinkedIn reader, follows accounting tech updates
- Watches YouTube tutorials for software reviews

Buying Behaviors



I don't have final say, but I vet every tool we bring in. If it's messy or unstructured, it won't get my support.

- Prioritizes clean data and compliance
- Pushes for automation and proper audit trails
- Avoids tools that feel "designed for someone else"

Content Behaviors



I want real documentation, samples, and screenshots — not marketing fluff.

- Downloads product guides and tax checklists
- Skips blog posts and inspirational stories
- Reads support documentation before demos
- Shares comparisons with decision maker

Empathy Map

Thinking

We need something more reliable — our current approach creates risk and wastes my time.

Feeling

It's frustrating when I'm asked to fix problems that could've been avoided with better systems.

Seeing

Too much of my time is spent reconciling manual entries and fixing preventable errors.

Doing

I spend a significant amount of time running payroll manually, double-checking timesheets, chasing down missing employee info.

Key Takeaway

If I can't trust the numbers, I can't recommend the solution.

Communication Do's and Don'ts

Do

- Show sample reports and exports
- Speak to tax season efficiency
- Prove how it works with QuickBooks
- Let me test the backend or admin panel

Don't

- Talk in high-level marketing language
- Skip over compliance or audit support
- Promise automation without controls
- Assume I don't need visibility



Shiela Cruz, 54

Ratifier
Small Profile

Company:
Cruz Financial

Business Role:
CPA (external accountant)

"My job is to keep George out of trouble — if it's not compliant, it's not worth the risk."



Business Goals
I want clean records, accurate filings, and tools that help my clients stay out of hot water — without making my job harder.



Responsibilities
I protect the financial health of the business from a legal and compliance standpoint.

- Prepare and file payroll taxes
- Review and reconcile wage and hour reports
- Advise on state/federal labor compliance
- Maintain audit readiness across all clients



Tech Understanding
I'm tech-capable, but I expect software to align with real-world tax processes.

- Uses QuickBooks Desktop and online portals
- Prefers downloadable reports vs. dashboards
- Maintains organized digital records
- Avoids tools that “automate” without explanation

Pain Points

Too often, I'm handed tools that weren't designed for accountants — and then expected to fix them.

- Missing or mis-formatted year-end tax reports
- Inconsistent data between systems
- No clear audit trail or change history
- Clients don't know what they're responsible for

Needs

I need accuracy, transparency, and exportable reports that align with IRS and state requirements.

- System-generated W-2s, 1099s, and 941s
- Clearly labeled payroll tax documentation
- Accessible year-end summaries and record
- Downloadable files that import cleanly into my tax software

Influencers

I rely on professional standards and peer insight.

- Other CPAs I trust
- Bookkeepers and controllers I work with
- Maggie (day-to-day contact)
- AICPA and state board resources

Current Behaviors

Search Behaviors



I don't shop for software, but I research any platform my clients bring to me. However, when I am approached by payroll companies, I look at their site.

- Awareness: Payroll partnership discussions or Maggie, George or Tyler
- Consideration: searches “[platform] tax compliance” or “QuickBooks export”
- Decision: Gives green light based on report clarity and tax-prep ease

Social Behaviors



I don't use social media for business — I rely on peer CPAs and accounting forums.

- Doesn't engage with Facebook or LinkedIn
- Member of AICPA and IFAC group email threads
- Reads industry newsletters and vendor update emails

Buying Behaviors



I'm not the buyer, but if I say it's a no, it's a no. My recommendation matters to everyone at the table.

- Prioritizes compliance, audit trails, and report accuracy
- Requires tax-time efficiency and flexibility
- Won't support tools that complicate year-end filing

Content Behaviors



I look for clean, concrete information — not fluff.

- Reviews PDFs, sample reports, tax documentation
- Ignores flashy landing pages or buzzwords
- Downloads reference guides and deadline calendars
- Will request a sample W-2 or 940/941 file before approval

Empathy Map

Thinking

A lot of systems make promises, but most still leave me cleaning up the mess.

Feeling

Skeptical. I've seen enough to know what works — and what gets people audited.

Seeing

Too many small businesses rely on messy, manual systems that lead to tax-time panic.

Doing

Reviewing reports, reconciling books, and trying to track down missing or inconsistent payroll data.

Key Takeaway

If I don't trust the numbers, I'll veto...and they'll listen.

Communication Do's and Don'ts

Do

- Show me sample tax reports
- Explain how the platform handles filing deadlines
- Be clear about CPA access levels
- Send documentation upfront

Don't

- Gloss over compliance or taxes
- Rely on marketing slides without real documents
- Assume I'll figure it out after onboarding
- Keep me out of the loop



Ben Taylor, 28

User
Small Profile

Company:
Oak & Vine Landscaping

Business Role:
Employee

"Just tell me where to clock in and when I'm getting paid."



Business Goals
I want to get paid on time, see my schedule without asking, and spend less time messing with paperwork.



Responsibilities
I want to clock in, get his job done, and go home — without tech getting in the way.

- Showing up on time
- Tracking and submitting hours
- Requesting time off when needed
- Following the posted schedule



Tech Understanding
I'm mobile-native but has never used a digital work system — he expects it to work like any other app.

- Uses Android, Venmo, Instagram, Spotify
- Learns by doing — not by reading
- Will ignore tools that feel outdated or confusing
- Prefers visual over written instructions

Pain Points

- I just want to get paid on time and not have to ask
- Doesn't know how or where to check pay or hours
 - Loses track of paper schedules or PTO approvals
 - Has to ask someone for every update
 - Gets confused by login steps or multiple apps

Needs

- I need a simple, phone-based way to log in, see my hours, requested time off and get my info to submit taxes.
- Mobile clock-in/clock-out that's easy to find/use
 - Pay stub & schedule access in one place
 - Notifications for payday, shift changes, and approvals
 - No-complication login and profile setup

Influencers

- I usually just follow what my manager and coworkers are doing.
- I trust my manager to explain what to use
 - I'll watch a YouTube video if I get stuck
 - If it looks good in the app store, I'll try it

Current Behaviors

Search Behaviors



- I'm online all day, usually on Instagram or YouTube or TikTok.
- Awareness: hears about systems from manager or coworkers
 - Consideration: searches "how to log hours in [tool name]"
 - Watches YouTube for walk-throughs
 - Decision: I don't get a say, but I sure want it to work the first time!

Social Behaviors



- I'm on my phone all day, but not for anything work-related — unless I have to be.
- Active on Instagram, TikTok, Reddit
 - Uses text and DMs to talk with coworkers
 - Searches YouTube for how-to videos and app reviews

Buying Behaviors



- I'm not a buyer — but if it's confusing or breaks, I'm going to complain until someone fixes it.
- Needs mobile-friendly tools
 - Avoids anything with a login he can't remember
 - Won't dig for information — expects it to be obvious

Content Behaviors



- I skim everything. I only engage if it's visual, short, or in a format I already use.
- Likes push notifications or in-app alerts
 - Watches 30-second tutorials
 - Ignores long guides or multi-step processes
 - Relies on coworkers to explain things

Empathy Map

Thinking

This should be simple. I don't want to call my manager every time I need something.

Feeling

Frustrated when things aren't clear, impatient when things feel slow, relieved when it all works without a hassle.

Seeing

I use my phone for everything, but our work systems feel like they were built for a flip phone.

Doing

Texting my manager with questions, writing down my hours on my phone, hoping it all got entered right.

Key Takeaway

I want my paychecks on time. It would be cool to log time from my phone.

Communication Do's and Don'ts

Do

- Show the app, step-by-step
- Use clear icons and simple copy
- Send alerts or messages when something changes
- Make everything mobile-first

Don't

- Expect him to read long PDFs or training docs
- Require logins from a desktop
- Assume he understands work systems
- Hide info across multiple platforms



Medium Segment





Medium Segment

26–50 Employees

Who are we selling

Ideal Customer Profile

- 5-10 location retail
- 3-4 location restaurant
- 26-50 employees
- \$3-\$10MM in annual revenue
- Industry examples:
 - Regional construction
 - Regional home services
 - Single warehouse wholesale
 - Franchisees

The business needs:

A dependable, centralized payroll + HR solution to reduce manual work, ensure compliance, and improve efficiency

The business values:

Operational efficiency, reduced owner involvement, and smart delegation

The business owner wants to:

Step back from day-to-day tasks while ensuring managers have the tools to succeed

Why are we selling them?

Insights on known issues that exist

- Manually coordinating payroll across departments or locations
- Spreadsheets used for tracking hours, PTO, and staff changes
- Risk of tax or compliance mistakes falling on the owner or CPA
- Time-consuming new hire setup or employee questions

Perspective on potential issues that would impact the Target or Stakeholder

- Disconnected tools increase error risk and staff burden
- No visibility into labor trends or costs limits growth decisions
- Admins waste time solving issues that should be automated
- Employees expect modern, mobile tools to manage pay and time

Current systems managed by CPA/Bookkeeper

- Spreadsheets
- QuickBooks Payroll
- Zenefits

What are we selling them?

Primary Offerings

- Accrue Payroll + HCM
- Tax filing and compliance monitoring
- PTO tracking and onboarding automation
- Mobile access for employees
- Real-time payroll and labor cost visibility

Accrue Distinctions

- Designed for growing teams without HR departments
- Hands-on implementation and ongoing support
- One system for payroll, people, and compliance
- Aligned workflows for CPA and insurance broker partners

Accrue Competition

- Gusto | QuickBooks Payroll | ADP Run

How are we selling?

Listen vs. Talking

- What's the worst payroll error that has happened and how did your employees respond"
- "What's the most difficult part of payroll for you right now?"
- "Who usually handles employee questions about time off or pay?"
- "Have you ever missed a filing deadline — or worried you might?"

Tying a solution to a concept

- Highlight the transition from owner-in-the-weeds to manager-led execution across locations
- Show how centralized tools reduce friction and free up everyone's time — from leadership to frontline
- We give owners clarity and control, and equip managers and employees to handle their work independently

Looking for Alignment

- Surface all the manual handoffs between owner, ops, and bookkeeper
- Explore how employee questions flow today — and where they get stuck
- Understand how they plan to grow over the next 12–24 months

Action Commitments

- Schedule demo with both Champion/Decision Maker
- Share tax/compliance checklist to compare features
- Invite CPA or Bookkeeper into decision process

They're growing fast and need systems that keep up — without creating chaos.



Was this sales play successful?

- Owner acknowledged too much involvement
- Bookkeeper asked for a process comparison
- CPA interested in compliance review





Tanya Boyd, 47

Champion
Medium Profile

Company:
Boulder Street Dental Group

Business Role:
Operator/Office Manager

“If I have to step in every time, the system’s not doing its job.”



Business Goals
I want clear, consistent systems so I’m not reinventing the wheel at every location — and so my team can solve more without me.



Responsibilities
I coordinate people, process, and paperwork across every location — and I’m the one who fills in the gaps.

- Run payroll and correct errors before submission
- Handle employee documentation and onboarding
- Support managers with PTO tracking & schedules
- Answer questions when local managers escalate
- Train new hires and managers on systems and workflows



Tech Understanding
I know how to use tech — but it should work the same everywhere and not break under pressure.

- Uses QuickBooks, Google Workspace, and Zenefits
- Switches between mobile and desktop
- At ease with software — hates when it’s inconsistent
- Has no time to troubleshoot or re-train for every update

Pain Points

Too much of my day goes to solving problems that better tools could prevent.

- Managers handling HR and payroll differently
- I still get time-off, pay, and onboarding questions
- I must double-check work across offices
- Onboarding breaks down when not directly involved
- No centralized place to track who’s doing what

Needs

I need a system that lets every manager do things the right way — so they don’t have to come to me for everything.

- Role-based access for each location
- Unified place for PTO, onboarding, pay, and docs
- Clean workflows for repeat tasks
- A real support line if something breaks
- One platform everyone can follow

Influencers

I rely on our management and financial trusted advisors when making decisions:

- David (CEO)
- CPA
- Insurance Broker
- Frontline Managers

Current Behaviors

Search Behaviors



I search online for tools that make my team more self-sufficient.

- Awareness: I hear about systems from our CPA, broker, or other office managers
- Consideration: Searches terms like: “multi-location HR and payroll software”
- Decision: I narrow it down to 2–3 options and bring them to the owner

Social Behaviors



I follow office manager groups and watch how-to content.

- Active in private Facebook groups for office leads and admins
- Watches short, practical YouTube videos to evaluate tools
- Rarely posts but reads comment threads and peer feedback
- Not active on LinkedIn or professional forums

Buying Behaviors



I have significant pull in the systems we use. I recommend tools I trust — and that I know my team can use.

- I prioritize systems that are easy to roll out and follow
- I won’t support anything that makes things harder for managers
- I walk away from software that doesn’t work across locations
- I keep an eye on budget because I know our owner does

Content Behaviors



I skim through demos and print comparisons for my CEO.

- Collects visual content like feature grids and printable overviews
- Prefers short videos and checklists over long-form demos or webinars
- Avoids marketing copy that over-promises or uses too much jargon
- Ignores complex blog posts and overly technical writeups

Empathy Map

Thinking

There must be a platform that provides structure and self-sufficiency — so I’m not the only one holding it all together.

Feeling

Frustrated but hopeful — she knows that better systems can ease the chaos, but she’s tired of playing middleman.

Seeing

Each office has its own way of handling onboarding, PTO, and payroll — and Tanya ends up stepping in when something breaks.

Doing

Coaching managers, cleaning up errors, and fixing process gaps that should’ve been solved by the system.

Key Takeaway

I’m tired of chasing issues. I need one place that keeps us on track.

Communication Do’s and Don’ts

Do

- Show how the platform works across locations
- Highlight admin-specific workflows and trainings
- Make it easy for her to test before rollout
- Equip us to confidently explain the system to others

Don’t

- Talk down to me
- Overcomplicate the pitch
- Pressure or rush me
- Oversell me on features



David Kim, 56

Decision Maker
Medium Profile

Company:
Boulder Street Dental Group

Business Role:
Owner/CEO

“I’m not looking to micromanage — I just need to know things are getting done right.”



Business Goals
I want to scale without losing control — and put systems in place that help my managers run the business like owners.



Responsibilities
I’m focused on strategy and protecting the business — but I get involved when things go sideways.

- Oversees budget and vendor decisions
- Delegates execution to managers & finance partners
- Signs off on new systems that impact staff/ finances
- Holds managers accountable to goals and process
- Works with the CPA and broker to manage risk and compliance



Tech Understanding
Comfortable with dashboards and reports — not interested in managing platforms directly.

- Uses QuickBooks and Google Drive
- Works on MacBook and iPhone
- Reads reports but rarely logs into platforms himself
- Needs tools that stay out of the way and don’t break
- Prefers systems that just “run” with little upkeep

Pain Points

I keep getting pulled into things I thought I’d already delegated.

- Managers aren’t always following the same process
- Too many exceptions still land on my plate
- No easy way to get visibility into time, pay, or onboarding status
- Concerned about compliance and financial risk as headcount grows
- Systems don’t scale — they just add complexity

Needs

I need a platform that lets me delegate without worrying what’s slipping through the cracks.

- A system that team can run without handholding
- Visibility into key workflows without logging in daily
- Standardized, compliant onboarding and payroll
- CPA and broker alignment for peace of mind
- Confidence that the team is using the tool correctly

Influencers

I rely on the people I trust — and they know what’s working on the ground.

- Tanya Boyd (Office Manager)
- Leo Tran (CPA)
- Carmen Blake (Insurance Broker)
- Peer business owners in related industries

Current Behaviors

Search Behaviors



I search for systems that keep me informed of best practices without needing to get overly involved.

- Awareness: Learns about potential solutions through CPA, peer conversations or industry references
- Consideration: Searches terms like “scalable payroll and HR system for growing business”
- Decision: Reviews long-term scalability/team adoption before approving

Social Behaviors



I follow other owners and advisors for trusted input.

- Relies heavily on word-of-mouth and CPA/broker recommendations
- Active in text threads and peer groups
- Follows industry vendors passively — doesn’t engage publicly
- Doesn’t spend much time on Facebook or LinkedIn

Buying Behaviors



I invest in systems that reduce liability and make delegation easier.

- Looks for tools that make it easier to hold others accountable
- Prioritizes automation and auditability over bells and whistles
- Won’t approve systems that feel risky or require constant attention

Content Behaviors



I read just enough to decide if it’s worth a meeting.

- Skims pricing pages, feature lists, and customer testimonials
- Interested in real-world case studies over high-level benefits
- Avoids jargon, overly technical content, or long setup guides
- Relies on his team to dig into the details

Empathy Map

Thinking

The only way to grow this thing is to get people what they need — and get myself out of the day-to-day.

Feeling

Cautiously confident — he knows the problems, but he’s seen vendors overpromise before.

Seeing

As the company grows, David sees inconsistent execution across locations and gets pulled into process gaps he thought he had delegated.

Doing

Checking in with his Office Manager, CPA, and Broker; looking at tools to streamline operations across locations.

Key Takeaway

I don’t need to run the system, but I need to trust it’s running right.

Communication Do’s and Don’ts

Do

- Show how this reduces exceptions and escalations
- Highlight tools that make delegation easier
- Reinforce support, compliance, and auditability
- Prove how this makes his team more accountable

Don’t

- Oversell features he’ll never use
- Assume he’s in the weeds daily
- Take risks lightly
- Waste time on long walkthroughs
- Gloss over HR details





Carmen Blake, 43

Influencer
Medium Profile

Company:
Axis Benefits Strategies

Business Role:
Independent Insurance Broker

“I’m not just here to sell benefits — I’m here to help my clients keep their teams happy and protected.”



Business Goals
I’m looking to provide more than just health plans — I want to be the one they turn to when they’re scaling and need smarter infrastructure.



Responsibilities
I advise owners on benefit strategy — and help them select platforms that support compliance and growth.

- Present HR packages to SMB & midsize businesses
- Align benefits packages with business goals/budgets
- Coordinate with CPAs, payroll providers, and TPAs
- Provide compliance guidance and renewal strategy
- Act as a long-term advisor, not just a once-a-year rep



Tech Understanding
I’m not a tech expert — but I can spot a tool that makes everyone’s job easier.

- Comfortable using most payroll/benefits systems
- Relies on demos to assess capabilities
- Prioritizes integrations and real-time access to data
- Doesn’t want to train clients — expects vendor onboarding support
- Recommends tools that reduce manual work and sync with carriers

Pain Points

I lose credibility when the systems my clients use don’t work — or don’t support the benefits I set up.

- Clients struggle with multiple logins or manual entry
- Lack of HR systems creates coverage gaps or compliance issues
- Disconnected payroll systems slow down onboarding and enrollment
- Client mistakes often fall back on Carmen to fix
- Can’t pull clean reports or audit benefits in real time

Needs

I need reliable platforms that give my clients — and me — visibility and peace of mind.

- System that integrates payroll and HR
- Tools that support ACA, COBRA, and eligibility requirements
- Dashboards to view employee status/deductions
- Quick access to forms, updates, and contact info
- A strong vendor partner who makes her look good

Influencers

I trust the professionals who understand my clients and can vouch for what actually works.

- Leo Tran (CPA)
- Tanya Boyd (Office Manager)
- David Kim (CEO)
- Fellow brokers and benefit consultants in her network

Current Behaviors

Search Behaviors



I look for platforms that make benefits easier for my clients — and easier for me to support.

Awareness: Hears about platforms from CPA, clients, or regional reps
Consideration: Searches terms like “HR and benefits platform with broker access”
Decision: Recommends 1–2 vendors that meet integration and support standards

Social Behaviors



I stay close to what other brokers and vendors are seeing in the market.

- Active in broker Facebook and Slack communities
- Attends webinars and compliance roundtables
- Keeps tabs on local carrier rep recommendations
- Follows vendors casually, but not publicly active

Buying Behaviors



I won’t recommend a system unless I trust it won’t make me the scapegoat.

- Pushes platforms that reduce errors and client workload
- Prioritizes tools with responsive vendor teams
- Avoids vendors that complicate enrollments or renewals

Content Behaviors



I skim fast — and share content that’s practical with client.

- Looks for checklists, FAQs, and renewal workflows
- Forwards videos or one-pagers to clients
- Avoids long product blogs and sales-heavy materials
- Reads broker-specific FAQs before recommending anything

Empathy Map

Thinking

I need my clients on tools that make the benefits actually work — otherwise I get blamed for the mess.

Feeling

Pride in being seen as a strategic resource — and frustration when tech breakdowns make her look careless.

Seeing

Clients bouncing between spreadsheets, email, and old portals to get basic benefits tasks done.

Doing

Advising on plan options, coordinating with vendors, and stepping in when benefits workflows fail.

Key Takeaway

I don’t sell software, but I know the system matters as much as strategy.

Communication Do’s and Don’ts

Do

- Show how the platform supports benefits, compliance, and real-time updates
- Make her look like the hero to her clients
- Give her easy-to-share materials and points of contact
- Highlight integrations with carriers and payroll

Don’t

- Assume she wants to “sell” your product
- Make her do the client onboarding work
- Overcomplicate the benefits setup process
- Leave gaps that put her reputation at risk





Leo Tran, 51

Ratifier
Medium Profile

Company:
Tran & Associates CPAs

Business Role:
Accountant / External CPA

“My job is to keep the business out of trouble — and I can’t do that if I don’t trust their systems.



Business Goals
I want to protect my clients from tax, compliance, and payroll liabilities before they happen — I need visibility to ensure that’s so.



Responsibilities
I review their financials, consult on hiring and growth, and flag risks before they become problems.

- File quarterly and year-end returns
- Provide guidance on payroll, taxes, & deductions
- Advise on 1099/contractor classification and compliance
- Coordinate with payroll provider on accuracy and reporting
- Maintain audit readiness



Tech Understanding
I’m fluent in the systems my clients use — but I won’t waste time with platforms that don’t talk to each other.

- Works on Windows 11 and iPhone 14
- Uses QuickBooks Online, Excel, and tax platforms
- Expects access to client payroll data in real time
- Familiar with Gusto, ADP, and similar tools
- Prefers systems with clean reports and exportable data

Pain Points

I spend more time chasing down paperwork than actually advising my clients.

- Inconsistent or manual payroll processes create risk
- No direct access to platforms = back-and-forth
- Errors in classification, tax filing, or onboarding
- Clients can’t always explain what systems are doing
- Limited visibility into benefits deductions or PTO liability

Needs

I need a system that gives me clean access, reliable data, and zero surprises.

- Direct access to payroll reports and filings
- Accurate employee classifications and automated tax setup
- Audit trails and document retention
- Seamless coordination with broker and manager
- Tools that keep clients in compliance without constant check-ins

Influencers

I trust the people closest to the day-to-day — they know where the gaps really are.

- Tanya Boyd (Office Manager)
- David Kim (CEO)
- Carmen Blake (Insurance Broker)
- Peer CPAs and financial advisors in his network

Current Behaviors

Search Behaviors



I look for platforms that give me clarity — not complexity.

- Awareness: Hears about platforms through clients, peers, or industry roundtables
- Consideration: Searches terms like “payroll software with CPA access and audit trails”
- Decision: Weighs in when clients ask “Should we switch?” — gives a clear yes or no based on risk and access

Social Behaviors



I trust insights from other CPAs and financial professionals in my network.

- Active in local CPA peer groups and webinars
- Occasionally browses LinkedIn for updates from vendors or firms
- Listens to accounting-specific podcasts and compliance updates
- Doesn’t use social media for product discovery

Buying Behaviors



I won’t sign off unless I’m confident it’s compliant — and gives me access.

- Recommends platforms with clear, audit-ready reporting
- Pushes back on tools that silo or hide data
- Prefers systems with phone support and CPA access

Content Behaviors



I care more about the numbers than the pitch — just show me what it actually does.

- Reads sample reports, help center articles, and compliance documentation
- Looks for downloadable templates or screenshots of tax setup
- Refers clients to CPAs-only FAQ or walkthrough links
- Skips long videos, marketing copy, or trend-focused blogs

Empathy Map

Thinking

I’m here to flag the red tape before it wraps around the business.

Feeling

Protective of clients — but frustrated when they use systems that create unnecessary risk.

Seeing

Client teams using outdated processes or exporting reports manually — with no idea what’s wrong until I find it.

Doing

Reviewing reports, correcting errors, and advising clients on how to prevent them in the future.

Key Takeaway

I don’t sell software, but I know the system matters as much as strategy.

Communication Do’s and Don’ts

Do

- Show how the platform supports benefits, compliance, and real-time updates
- Make her look like the hero to her clients
- Give easy-to-share materials and points of contact
- Highlight integrations with carriers and payroll

Don’t

- Assume she wants to “sell” your product
- Make her do the client onboarding work
- Overcomplicate the benefits setup process
- Leave gaps that put her reputation at risk





Jada Wells, 29

User
Medium Profile

Company:
Boulder Street Dental Group

Business Role:
Employee

“I just want to clock in, see my time off, and know when I’m getting paid — without chasing someone down.”



Business Goals
Stay on top of my schedule, get paid on time, and understand how much PTO I have.



Responsibilities
I try to keep things organized, but it’s tough when systems don’t talk to each other.

- Logs hours and checks schedule daily
- Submits time off requests
- Manages supply orders and customer scheduling
- Supports new hire paperwork
- Communicates with HR and finance for pay and benefits



Tech Understanding
I can use anything that’s intuitive — but I won’t spend 30 minutes learning it.

- iPhone 15
- Windows 10 desktop
- Comfortable with Zoom, Gmail, and shared docs
- Has used time tracking and scheduling apps
- Gets frustrated by buggy or slow systems

Pain Points

Keeping up with different systems is overwhelming and confusing.

- No easy way to check PTO balance or hours
- Doesn’t know where to find paystubs or schedule updates
- Has to ask manager for basic info
- Mobile tools don’t always work right
- Gets stuck waiting on responses from managers

Needs

We need tools that actually work without needing to ask for help every time.

- Mobile access to time, pay, and PTO info
- Simple dashboard that’s easy to read
- Ability to self-serve for things like address updates
- Notifications for approvals or changes
- One login for all work-related systems

Influencers

I look to people I trust at work before trying something new.

- Tanya Boyd (Office Manager)
- Coworkers in my location
- Team group chats or WhatsApp

Current Behaviors

Search Behaviors



I Google things when I’m stuck or trying to fix something myself.

- Awareness: gets confused when a paycheck or hours look off
- Consideration: searches “how to check my PTO” or “where’s my pay stub”
- Decision: clicks on links from HR or coworkers that explain how to log in

Social Behaviors



I am on my phone often and use most social platforms, although less lately.

- Coworker group chats
- Asks peers how they handled similar issues
- Occasionally checks app reviews
- Doesn’t use LinkedIn or professional networks

Buying Behaviors



I don’t buy the tools, but I’ll stop using them if they don’t work.

- Uses whatever app the company assigns
- Will stop engaging if the system is glitchy or confusing
- Follows HR’s lead but expects things to work
- Avoids anything that requires more than a few taps

Content Behaviors



I watch videos or check screenshots — not long documents.

- Uses help centers if screenshots are included
- Watches 1–2 min tutorials
- Ignores long blogs or technical breakdowns
- Forwards unclear materials to manager for help

Empathy Map

Thinking

This should be easier. I don’t want to waste time figuring things out.

Feeling

Anxious about missing something important — but also annoyed when systems are clunky.

Seeing

I see my friends use their phones for things like submitting PTO, but we don’t have anything like that.

Doing

Keep track of my time manually, mostly just putting in 8 hours. Texts or emails my managers if I need time off.

Key Takeaway

I want to work for a company that has modern systems like all my friends.

Communication Do’s and Don’ts

Do

- Show me exactly where I’ll clock in and check my time off
- Walk me through the mobile app — that’s what I’ll use most
- Keep it simple — I don’t want to click around a lot
- Make sure I can find things without asking HR every time

Don’t

- Talk about stuff only managers or HR care about
- Make me download three different apps
- Assume I’m sitting at a desk all day
- Cover features I’ll never use





Large Segment





Large Segment 51–100 Employees

Who are we selling

Ideal Customer Profile

- 10-15 location retail
- 6-9 location restaurant
- 51-100 employees
- \$7-\$25MM in annual revenue
- Industry examples:
 - Multi-region healthcare
 - Multi-region home services
 - Multi-warehouse wholesale
 - Franchise owners

The business needs:

An all-in-one system that's centralized, automated, and scalable

The business values:

Data accuracy, employee accountability, visibility across departments

The business owner wants to:

Ensure compliance, reduce exposure, and unlock time across their management team

Why are we selling them?

Insights on known issues that exist

- Too many disconnected systems (HR, time, payroll, benefits)
- No shared visibility across locations or departments
- Complex benefits and PTO structures aren't managed well
- Leadership spends too much time putting out fires

Perspective on potential issues that would impact the Target or Stakeholder

- Inconsistent workflows across stores/job sites creates liability
- Siloed systems force HR/Finance to manually reconcile data
- Employees expect mobile access and self-service
- Finance and owners lack real-time visibility into labor spend

Current systems managed by CPA/Bookkeeper

- QuickBooks / ADP / Paychex
- Paper-based or fragmented onboarding
- Time tracking via spreadsheets or third-party apps

What are we selling them?

Primary Offerings

- Accrue Payroll + HR + Time
- Centralized tax filing and compliance automation
- Configurable multi-location policies

Accrue Distinctions

- One connected platform for payroll, HR, time, and benefits
- Location-level controls with company-wide reporting
- CPA and broker ready
- Real-time support and hands-on onboarding

Accrue Competition

- ADP | Paycor | Paylocity | Rippling

How are we selling?

Listen vs. Talking

- “How do you track PTO, overtime, and benefits across locations?”
- “What’s the biggest payroll risk you've had to manage this year?”
- “Who approves time and handles compliance checks?”
- “How do you handle multi-state filing and reporting?”

Tying a solution to a concept

- Shift from putting out fires to operating with confidence.
- Emphasize the power of connected systems across HR, finance, and compliance — without adding headcount.
- Show how centralized tools reduce friction and free up everyone’s time — from leadership to frontline

Looking for Alignment

- Walk through how they onboard and track employees today
- Ask who has access to payroll data — and who needs it
- Dig into where the process breaks down between HR and Finance

Action Commitments

- Schedule multi-role demo with HR, Finance, and Owner/Operator
- Provide checklist of location and role-based controls
- Offer co-branded overview to send to CPA and broker

**They’ve done the hard part: growing the business.
Now they need infrastructure that protects it.**



Was this sales play successful?

- Owner requested rollout timeline
- Broker validated benefits sync and reporting
- Finance flagged labor cost insights as key value-add



Sara Jordan, 39

Champion
Large Profile

Company:
Summit Field Services

Business Role:
HR Manager

“If my managers can’t follow it and my execs can’t trust it — the system’s not doing its job.”



Business Goals
I want scalable systems that work across locations — and allow our people to follow process, not chase it.



Responsibilities
I lead HR for the entire group — but I’m still the one who makes things work when tech fails.

- Own HR tools, onboarding, employee records
- Support managers on PTO, scheduling, and approvals
- Ensure compliance with labor laws
- Guide admins on systems and performance processes
- Liaise between Finance, Operations, and leads



Tech Understanding
I can manage any system — but it has to scale and support our managers, not just me.

- Uses Paylocity, Excel, and HRIS (BambooHR)
- Comfortable navigating admin settings and dashboards
- iPhone 14, Windows 11 desktop
- Switches between mobile and desktop daily
- Hates inconsistent UI and laggy workflows

Pain Points

I spend too much time fixing avoidable issues because our systems don’t work together.

- Managers follow different onboarding and PTO workflows
- Payroll questions still land on my desk
- No clean way to enforce policy across locations
- Too many handoffs, spreadsheets, and manual approvals
- No centralized visibility across departments

Needs

I need a platform that gives every manager the right tools — and frees me up to focus on people, not process gaps.

- Unified system for onboarding, time, pay, and compliance
- Role- and location-based access controls
- Clean, repeatable workflows for each department
- Mobile tools for managers and field employees
- Support team that helps — not forwards links

Influencers

I bring in the people who hold me accountable — and who see what I deal with daily.

- Carlos (CEO)
- Jonathan (Finance Lead)
- Broker / CPA
- Regional managers and site admins

Current Behaviors

Search Behaviors



I search for systems that reduce admin time and enforce consistency across teams.

- Awareness: I hear about tools from peers, vendors, or webinars
- Consideration: Searches terms like: “multi-location HR payroll software for service businesses”
- Decision: I compare 2–3 top options and bring in Finance and CEO for review

Social Behaviors



Outside of personal use, I use social platforms to see what HR pros like me are talking about.

- Active in HR Slack groups and SHRM community forums
- Watches case studies and demos from peer-sized companies
- Follows vendor pages on LinkedIn for real-world use cases
- Asks private peer groups what works across states

Buying Behaviors



I influence most system decision — and push hard for anything that makes us more self-sufficient.

- Prioritizes scalability and rollout support
- Avoids software that only works in one region or use case
- Flags anything that adds manual steps or delays
- Won’t recommend tools that Finance or field teams push back on

Content Behaviors



I read deeper when the content helps me plan and train others — not just sell me.

- Reads setup and implementation guides
- Downloads rollout templates and team checklists
- Watches manager-level workflow demos, not just overview videos
- Shares whitepapers or ROI breakdowns with Finance and leadership
- Avoids content that oversimplifies complex orgs

Empathy Map

Thinking

Our current systems are not sustainable — we can’t keep patching problems across 10 locations.

Feeling

Frustrated and spread thin — but hopeful a better system could unlock all-around efficiencies that will help save time, improve moral and promote growth.

Seeing

Inconsistent processes, bottlenecks at HR, and managers improvising in ways that create risk and negatively impact moral and retention.

Doing

Coaching managers, responding to escalations, cleaning up compliance and tracking gaps.

Key Takeaway

I’ll lead the rollout, but the system needs to work without me being the glue.

Communication Do’s and Don’ts

Do

- Show me how it works across locations and roles
- Let me test the admin and manager workflows
- Give me proof it scales with compliance in mind
- Equip me to train and support my team

Don’t

- Skip over setup or support structure
- Assume I’ll handle everything manually
- Oversell features we won’t use across teams
- Downplay how painful bad rollout can be





Carlos Perez, 56

Decision Maker
Large Profile

Company:
Summit Field Services

Business Role:
Owner/CEO

“I don’t need to touch the system — I just need to know it protects the business and helps my team do their jobs.”



Business Goals
I want to scale with confidence — and build a leadership team that doesn’t need my shadow to get things right.



Responsibilities
I drive growth, structure leadership, and protect the business — but I step in when cracks show up.

- Owns final decisions on major vendors
- Delegates rollout and adoption to leaders
- Sets performance expectations and accountability
- Collaborates with Finance and HR on compliance and headcount
- Scans for operational risk and inefficiency



Tech Understanding
I’m comfortable reviewing metrics and dashboards — just don’t make me chase updates or click ten times.

- Has used QuickBooks Online, Gusto reports
- MacBook Pro and iPhone 16
- Reviews dashboards but rarely logs into admin
- Expects mobile-friendly reporting and push updates
- Avoids tools that break or require regular maintenance

Pain Points

I’m still looped into issues that should be handled by my directors or department leads.

- Managers aren’t aligned on systems or process
- Inconsistent hiring and onboarding across regions
- No unified view of time, payroll, or labor cost trends
- Worried about compliance risk with distributed teams
- Every new tool seems to create another manual step

Needs

I need one system that supports scale, prevents exposure, and helps my team stay on track — without extra overhead.

- One platform for onboarding, time, pay, and compliance
- Manager-level accountability with minimal top-down intervention
- Automated workflows and audit trails
- Confidence in how benefits, tax, and state rules are handled
- Visibility without micromanagement

Influencers

I listen to the people who actually run the day-to-day — and the ones who’ll call it out if it’s broken.

- Melissa Jordan (HR Manager)
- Jonathan Wells (Finance Lead)
- Broker / CPA
- Other business owners in my peer group

Current Behaviors

Search Behaviors



I research future-looking solutions and scalable systems that reduce dependency on me and will help the business thrive.

- Awareness: Hears about platforms through peers or vendor referrals
- Consideration: Searches terms like “HR and payroll system for multi-location business”
- Google’s term like: “best HRIS for growing construction companies”
- Decision: Weighs long-term adoption risk, compliance benefits, and team accountability

Social Behaviors



I trust what other business owners and my advisors are using, but I am also open to looking into new ways of doing things.

- Talks regularly with CPA, broker, and peer operators
- Participates in business mastermind groups
- Follows vendor news — doesn’t interact
- Avoids social media for work decisions

Buying Behaviors



I say yes to tools that de-risk growth and improve accountability.

- Won’t approve tools that feel half-baked or immature
- Wants assurance on compliance and scalability
- Looks for systems that make teams self-sufficient
- Needs clarity on ROI and onboarding effort

Content Behaviors



I don’t need fluff — just the facts that prove this will work for my org.

- Skims exec summaries, risk comparisons, and testimonials
- Reads implementation timelines and case studies from similar companies
- Shares deep dives with Finance and HR
- Avoids buzzwords, vague benefits, and flashy sales decks

Empathy Map

Thinking

We’re growing fast — and I need infrastructure that keeps pace without adding more noise.

Feeling

Wary of another rollout that slows the team down — but optimistic if it brings real structure.

Seeing

Fragmented systems, inconsistent execution, and too much reliance on a few key people.

Doing

Working with leadership to tighten operations, reviewing spend, asking tough questions about ownership and follow-through.

Key Takeaway

I’ll invest in the system — but only if it protects the business and scales without leaning on me.

Communication Do’s and Don’ts

Do

- Show me how this reduces risk and increases accountability
- Prove it works across 10+ locations
- Give me real examples from companies like mine
- Keep it tight — I need clarity, not complexity

Don’t

- Oversell features I’ll never use
- Expect me to train the team
- Gloss over compliance or tax handling
- Bury the ROI behind buzzwords





Dan Price, 46

Influencer
Large Profile

Company:
Price Benefit Partners

Business Role:
Insurance Broker

“I’m not here to pick your tech — I’m here to make sure you don’t end up in a lawsuit or on the hook for mismanaged benefits.”



Business Goals
I want clients to have a clean, compliant system that integrates with their benefit stack but doesn't create more work during renewal season.



Responsibilities
I support Summit’s leadership in making sure benefits are aligned, risk is reduced, and systems play nicely.

- Advises on plan selection and renewal strategy
- Reviews payroll and eligibility data quarterly
- Guides HR through compliance and employee communications
- Coordinates with CPA, legal, and carriers during audits
- Acts as escalation point when claims or systems fail



Tech Understanding
I’ve worked with everything from ADP to PEO platforms — I know when a system’s going to make things harder

- Familiar with Paylocity, Gusto, Rippling, and PrismHR
- Uses integrations for eligibility feeds and deductions
- iPhone 14, MacBook Air
- Comfortable with broker portals and reports
- Avoids platforms that can’t support EDI or ACA compliance

Pain Points

I get dragged into things I shouldn’t — because their tools don’t communicate or track what matters.

- Discrepancies between time tracking and eligibility
- Manual errors in deductions or benefit setup
- HR teams don’t update status changes consistently
- Compliance documents get lost in email
- Poor audit trails when questions arise

Needs

I need a system that protects the client and keeps me out of fire drills.

- Accurate and timely benefit deductions
- Clear record of hours and qualifying events
- Integration or easy export to broker/carrier systems
- Tools that help HR admins get things right
- Audit visibility for hours, enrollment, and payroll sync

Influencers

I’ll push hard if I see a risk — but I still need HR and leadership aligned.

- Melissa Jordan (HR Manager)
- Carlos Ramirez (CEO)
- Jonathan Wells (Finance Lead)
- Occasionally looped in with CPA or employment attorney

Current Behaviors

Search Behaviors



I keep an eye out for systems that reduce compliance risk and feed benefit data cleanly.

Awareness: Notices breakdowns during renewal season or claims reviews
Consideration: Searches terms like “HRIS that supports benefits compliance”
Decision: Flags options for HR and Finance if current tools are risky or error-prone

Social Behaviors



I rely on my broker network to know what works in the real world.

- Shares war stories with other brokers and consultants
- Joins carrier and compliance webinars
- Keeps tabs on tools other clients are adopting
- Avoids vendor sales hype — trusts peer use cases

Buying Behaviors



I don’t sign the contract — but I’ll kill the deal if I see risk.

- Flags platforms without benefit deduction logic
- Pushes for tools with ACA tracking and integrations
- Prefers vendors who communicate clearly with brokers
- Won’t recommend a system that makes HR chase data

Content Behaviors



I want the compliance fine print and the setup checklist — not a flashy product video.

- Reads benefits sync docs, compliance overviews, and partner guides
- Wants EDI/ACA capabilities clearly listed
- Checks onboarding and carrier coordination timelines
- Avoids vague marketing promises or lifestyle-heavy demos

Empathy Map

Thinking

If HR’s still updating benefit status in a spreadsheet, we’re headed for problems.

Feeling

Protective of my client — frustrated when avoidable errors put them at risk.

Seeing

Broken data flows, last-minute enrollment scrambles, and HR teams doing work the system should be handling.

Doing

Coordinating with HR, reviewing reports, troubleshooting sync issues, and prepping for audits.

Key Takeaway

I’m not trying to block progress — I’m trying to make sure the system keeps clients out of trouble.

Communication Do’s and Don’ts

Do

- Show how deductions, eligibility, and hours sync automatically
- Highlight ACA and compliance tracking capabilities
- Make sure HR and Finance both understand the benefits setup
- Loop me in before things go live

Don’t

- Skip over benefits in the demo
- Pretend compliance is “just HR’s job”
- Push tools that don’t integrate with brokers
- Leave HR alone to figure out benefit settings





Cara Steele, 42

Ratifier
Large Profile

Company:
Summit Field Services

Business Role:
Finance Lead

“I don’t need full control — I need visibility, accuracy, and confidence in the numbers.”



Business Goals

I want clean data, aligned teams, and systems that protect us from preventable risk — especially with 12 locations and hundreds of filings.



Responsibilities

I oversee financial systems, reporting, and payroll alignment — and I step in when vendor choices impact compliance.

- Owns payroll reporting and quarterly filings
- Reviews benefit deductions and tax classifications
- Advises on contractor vs. W-2 setup
- Validates budget projections against payroll spend
- Works with HR and external CPA to maintain audit readiness



Tech Understanding

I’m fluent in numbers, exports, and platforms — but I won’t chase info across disconnected systems.

- Uses QuickBooks Online, NetSuite, Excel
- Windows 11 laptop and iPhone 14
- Experienced with banking/payroll APIs
- Comfortable with report builders and GL exports
- Wants clean dashboards with drill-down access

Pain Points

I can’t do my job if I have to clean up bad data or hunt for what the system should already show.

- Manual entries cause reporting delays
- Limited visibility into fringe costs and tax exposure
- Inconsistent setup across branches
- Benefit deductions don't always match carrier billing
- Audit trail gaps make me nervous

Needs

I need a system that gives me clean access, reliable data, and zero surprises.

- Clear audit trail with time, pay, and classification history
- Accurate GL codes and exportable reports
- Tools that handle benefits and compliance at scale
- Support access if something looks off
- Built-in alerts when something falls out of spec

Influencers

I trust the people closest to the workflows — they see the gaps before Finance does.

- Melissa Jordan (HR Manager)
- Carlos Ramirez (CEO)
- Daniel Price (Insurance Broker)
- Internal accountants and CPA peer network

Current Behaviors

Search Behaviors



I don’t browse for new systems — but I flag problems when our current one creates risk.

- Awareness: Hears about systems from peers
- Consideration: Searches terms like “payroll system with audit history and export features”
- Decision: Reviews risk, GL mapping, and compliance features before giving the green light

Social Behaviors



I listen to other finance leads and advisors I trust — not sales decks.

- Active in finance and CPA Slack groups
- Reads LinkedIn posts from peer firms and SaaS vendors
- Attends vendor demo roundtables and webinars
- Doesn’t use social for vendor discovery

Buying Behaviors



I’m not the one buying — but I’ll veto it if it puts Finance at risk.

- Requires audit-readiness and clean documentation
- Validates benefit deduction mapping and tax setup
- Pushes for systems with strong export and approval workflows
- Blocks anything that feels underbuilt or immature

Content Behaviors



I’m a numbers person. I don’t need fluff — I need proof it works.

- Reads sample audit logs and GL export guides
- Downloads compliance checklists and CPA guides
- Reviews help center documentation before recommending
- Skips splash pages and trend reports

Empathy Map

Thinking

The system is either helping us scale — or hiding risks we’ll pay for later.

Feeling

Cautious and a bit skeptical — but open if the numbers and controls check out.

Seeing

Branch-level inconsistencies, manual overrides, and missing audit data that slows down Finance.

Doing

Reviewing exports, comparing data across systems, and raising flags early to avoid late-stage messes.

Key Takeaway

I don’t need to be the buyer — I just need to know Finance won’t be left holding the bag.

Communication Do’s and Don’ts

Do

- Show me how this maps to the GL and supports audit-readiness
- Send samples I can review without a sales call
- Walk me through what Finance gets access to
- Respect the fact that I care about risk, not features

Don’t

- Talk around compliance or payroll accuracy
- Make HR the go-between for reports
- Force me to ask for access
- Assume Finance will fix the gaps later





Myles Grant, 27

User
Large Profile

Company:
Summit Field Services

Business Role:
Employee/Field Tech

“At a company this size, I shouldn’t have to guess where to clock in or how to check my hours.”



Business Goals
Get my work done, avoid paycheck surprises, and not waste time figuring out HR stuff I barely use.



Responsibilities
I’m on job sites all day — I need quick access to what matters, without logging into a desktop.

- Clocks in/out remotely based on job location
- Submits time-off requests or shift swaps
- Reviews job schedules and assignments
- Checks paystubs and hours when payroll hits
- Flags issues to dispatch or HR if something’s off



Tech Understanding
I’m tech-native, so I expect that I can do anything I need to do right from my phone.

- Uses iPhone 14 daily
- Familiar with apps like TSheets, Jobber, and Slack
- Limited desktop use — mostly mobile-based
- Comfortable texting, scanning QR codes, and using push notifications
- Drops off quickly if an app is slow or confusing

Pain Points

It shouldn’t take five different apps or a manager to help me do basic things.

- Mobile tools don’t always load or sync
- No easy way to check overtime or job hours
- Has to call or text for time-off requests
- Doesn’t know where to check PTO or benefits
- Gets confused with password resets or multiple logins

Needs

Give me one app that shows my schedule, pay, and time off — and let me fix stuff without calling someone.

- Simple, mobile-friendly interface
- Push notifications for approvals/schedule changes
- Able to update contact info or check PTO on the go
- Single login for all work-related tasks
- Clear feedback when something is submitted

Influencers

My manager usually tells me what system to use, and I typically can figure it out.

- Melissa Jordan (HR Manager)
- On-site supervisor
- Peers in my region
- Crew group chats or WhatsApp

Current Behaviors

Search Behaviors



I Google almost everything, especially if I can’t figure it out.

- Awareness: gets confused when PTO or pay looks off
- Consideration: searches “how to check my PTO on [tool name]” or “can’t log into time tracker”
- Decision: clicks on links or screenshots that coworkers send

Social Behaviors



I trust people on my crew — if they use it and it works, I’ll try it.

- Text chains and WhatsApp chats with the team
- Asks others how they handled login or app issues
- Follows up on what managers mention during huddles
- Doesn’t use LinkedIn or company forums

Buying Behaviors



It’s not up to be what systems we use, but I sure don’t like when they make my life harder.

- Uses whatever HR assigns
- Abandons tools that crash or confuse
- Defaults to texting supervisor when unsure
- Won’t open apps that require too many steps

Content Behaviors



If it’s not short, visual, and on my phone — I won’t read it.

- Watches short tutorials with captions
- Checks screenshots or app walkthroughs
- Ignores long docs or multi-page instructions
- Sends unclear content to someone else to explain

Empathy Map

Thinking

We’ve got to be getting big enough that we will have mobile-first systems. Things are way too old-school.

Feeling

Mostly agnostic, but can be pretty annoying when there is obviously an easier way to do what we need to do.

Seeing

I see other companies using one app for time, pay, and PTO — we’re not there yet.

Doing

Tracking hours manually, texting questions to my lead, hoping I don’t miss something important.

Key Takeaway

I’ll use whatever you give me — but if it’s not simple, I’ll go back to texting my boss.

Communication Do’s and Don’ts

Do

- Show me where to clock in, check hours, and request time off
- Make sure the mobile app actually works in the field
- Use screenshots and short demos to explain
- Keep it simple — I don’t want to ask for help every time

Don’t

- Talk like I’m in an office
- Give me multiple apps or logins
- Expect me to figure it out on my own
- Ignore how slow or buggy the app is on my phone



Icon Library

Actions & Indicators

Cost



Security



Customer Support



Onboarding New Hires



Compliance



Online Sales



Social Behavior



Content Behavior



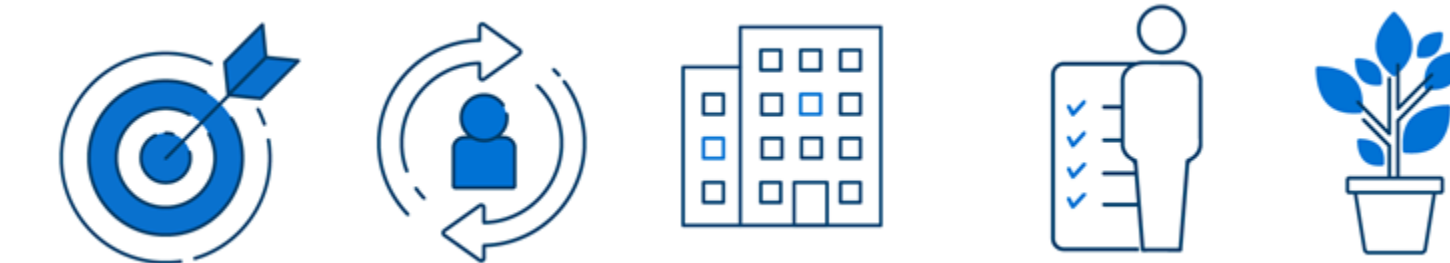
Tech Behavior



Search Behavior



Business, Personal Goals



Responsibilities



Tech Understanding



Avatar Library

Possible Customers









