



Employee – Sarah Thompson

"With my busy schedule, I need a portal that simplifies managing my benefits, allowing me to focus on work and family without unnecessary hassle."

Age: 32 years

Occupation: Marketing Specialist

Context

Sarah accesses the portal from both her work computer and mobile phone in short bursts, typically during breaks or after work hours. She relies heavily on mobile accessibility and intuitive design to complete her tasks quickly. Open enrollment periods are her busiest times on the platform, where she actively reviews options, updates dependent details, and confirms her selections. Tools that provide clear, well-organized information and cater to multitasking professionals like Sarah are essential to her user experience.

PERSONAL NARRATIVE:

Sarah is a dedicated marketing specialist at Uniworld, balancing her professional responsibilities with her role as a mother of two. Her days are packed with meetings, campaigns, and family commitments, leaving her little time to navigate complex systems. Sarah highly values tools that offer her autonomy and simplicity, allowing her to manage her benefits and payroll quickly. She frequently updates her family's healthcare details during open enrollment periods and uses digital resources to compare plans and ensure her family gets the best possible coverage.

Sarah prefers tools that are intuitive, mobile-friendly, and provide clear instructions without needing frequent assistance from HR. She appreciates features like reminders for deadlines, self-service options, and easy-to-understand language for navigating benefits and payroll documentation.

GOALS:

- Quickly access and manage benefits without needing to contact HR.
- Complete administrative tasks, such as updating dependent details or reviewing payroll, efficiently.
- Ensure her benefits align with her family's needs, especially during open enrollment periods.
- Leverage comparison tools to make informed decisions on healthcare plans.
- Avoid frustration by having access to concise, clear instructions and resources.

BEHAVIORS:

- **Mobile-First User:** Logs into the portal primarily from her smartphone, using quick sessions to complete updates or review benefits.
- **Self-Service Oriented:** Uses FAQs and tutorials to resolve most questions before reaching out to HR for help.
- **Security-Conscious:** Always checks for secure login credentials and signs out immediately on shared devices.
- **Decision-Maker:** Relies on visual and data comparison tools during enrollment to make informed choices for her family's benefit plans.
- **Reminder-Driven:** Responds well to system notifications and reminders about deadlines, ensuring she doesn't miss critical actions like enrollment or updates.

PAIN POINTS:

- **Complex Terminology:** Struggles with technical language in insurance, tax documents, and benefit descriptions, often requiring additional research.
- **Time Constraints:** Balances a demanding work-life schedule, leaving little room for long processes or multiple follow-ups.
- **Benefit Changes:** Experiences frustration when benefit providers change policies, requiring her to reevaluate and adjust plans.
- **Overwhelming Options:** Feels decision fatigue when presented with too many choices during enrollment periods without sufficient clarity or guidance.
- **Disjointed System Flow:** Finds it challenging when systems lack a cohesive flow, requiring her to navigate multiple interfaces to complete a single task.



HR Admin – Jason Lee

"I need tools that make it easy to answer employee questions quickly and keep our records accurate without downtime or delays, while effectively managing multiple HR responsibilities across different platforms."

Age: 45 years

Occupation: HR Administrator

Context

Jason's daily routine involves logging into the HR portal from both office and remote locations to address urgent queries and manage tasks efficiently. He leverages HR Mode for administrative functionalities like record validation, audit preparation, and policy updates. Simultaneously, he uses User Mode to replicate the employee experience and troubleshoot specific queries effectively. During high-demand periods, such as payroll processing, Jason works closely with IT to resolve any system issues promptly.

PERSONAL NARRATIVE:

Jason has been part of Uniworld's HR department for over a decade, focusing on payroll and benefits administration. His role demands constant interaction with employees, resolving queries efficiently while ensuring data accuracy. Jason's expertise lies in his ability to multitask and adapt to different systems and interfaces seamlessly. He plays a pivotal role in bridging employees and HR leaders, often troubleshooting issues directly through employee-facing tools. His work involves balancing routine administrative tasks with high-priority requests during peak periods like open enrollment and payroll deadlines.

Jason values innovative tools that allow him to switch between HR Mode (for administrative actions like validating employee records and processing requests) and User Mode (to replicate the employee view and troubleshoot queries). He also appreciates features like role-based access and robust reporting to enhance productivity and decision-making.

GOALS:

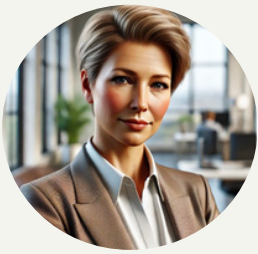
- Respond to employee queries efficiently and accurately.
- Maintain accurate and up-to-date benefits and payroll records.
- Facilitate smooth open enrollment by proactively addressing common employee questions.
- Minimize system downtime and ensure high system reliability.
- Access role-specific tools for quick troubleshooting and report generation.
- Streamline context-switching between multiple system interfaces to reduce operational overhead.

BEHAVIORS:

- **Platform Switching:** Regularly switches between HR Mode (administrative tools) and User Mode (employee-facing tools) to perform tasks effectively.
- **Multi-Platform User:** Uses desktop and mobile platforms interchangeably to ensure real-time accessibility during high-demand periods.
- **Proactive Problem-Solver:** Tracks and categorizes recurring employee inquiries to update FAQs and reduce repetitive questions.
- **System Integrator:** Collaborates with IT and finance teams to resolve technical issues, especially during critical operations like payroll and compliance audits.
- **Detailed Record-Keeper:** Ensures data integrity by periodically validating payroll and benefits records to prevent discrepancies.
- **Cross-Team Collaborator:** Coordinates with HR leaders and team members to plan proactive system upgrades or policy adjustments based on employee feedback.

PAIN POINTS:

1. **High Volume of Inquiries:** Manages a large number of queries, particularly during open enrollment and payroll deadlines.
2. **System Downtime:** Faces productivity bottlenecks when system performance slows or portals experience downtime.
3. **Context Switching Fatigue:** Balances multiple system interfaces and modes, which can sometimes disrupt workflow continuity.
4. **Employee Frustration:** Manages employee concerns related to payroll discrepancies, requiring clear communication and rapid resolutions.
5. **Data Accuracy Pressure:** Relies heavily on accurate data to maintain compliance and ensure seamless HR operations, creating constant pressure to double-check records.



HR Leader – Karen Monroe

"I need actionable insights from benefits data to drive strategic decisions that improve employee satisfaction, retention, and optimize HR processes, while ensuring seamless collaboration across teams."

Age: 50 years

Occupation: Director of HR

Context

Karen primarily accesses the HR portal from her office desktop but uses mobile devices during meetings to present data or make quick updates. Her role involves overseeing day-to-day operations while focusing on long-term strategy, often collaborating with IT and HR Admins to ensure the portal meets the needs of all stakeholders. Karen requires advanced access to all features available to HR Admins, with additional tools for analytics, reporting, and strategic planning. During peak periods like open enrollment, she provides leadership and guidance to ensure smooth operations.

PERSONAL NARRATIVE:

Karen has been leading Uniworld's HR department for over 15 years, guiding the organization's benefits and payroll strategies while aligning HR operations with company objectives. As the HR Leader, Karen oversees the entire HR portal, ensuring it meets the needs of employees, HR administrators, and management. She is a strategic thinker who relies on data and analytics to measure benefits utilization, identify trends, and inform key decisions that enhance employee satisfaction and retention.

Karen frequently collaborates with IT, finance, and senior management to ensure the portal's features and policies align with organizational goals. She is focused on minimizing manual processes for her team by advocating for intuitive self-service features and efficient workflows. As a higher-level authority, Karen has access to all functionalities available to HR Admins, with additional tools for advanced analytics, reporting, and decision-making.

GOALS:

- Align the HR portal with Uniworld's goals for employee satisfaction, retention, and operational excellence.
- Use advanced data analytics to assess benefits utilization and make informed decisions.
- Enhance the HR team's efficiency by automating manual tasks and reducing employee inquiries.
- Maintain compliance with audit requirements while optimizing benefits offerings.
- Empower employees and administrators with user-friendly features and clear documentation.
- Leverage advanced reporting to present actionable insights to senior management.

BEHAVIORS:

- **Advanced Analytics User:** Regularly reviews in-depth engagement analytics and system dashboards to assess trends and inform decisions.
- **Strategic Planner:** Works closely with IT, finance, and the Product Owner to prioritize portal enhancements based on employee feedback and company goals.
- **System Super-User:** Has full access to all HR Admin functionalities, including the ability to switch between HR Mode and User Mode, while leveraging additional leadership tools like advanced reporting, team management, and compliance tracking.
- **Collaborative Leader:** Frequently collaborates with HR Admins to monitor performance and with IT to resolve bottlenecks, ensuring system reliability.
- **High-Level Reviewer:** Periodically audits system usage, data accuracy, and team performance to ensure alignment with organizational goals.
- **Proactive Communicator:** Shares actionable insights with senior management through concise reports and presentations.

PAIN POINTS:

- **System Limitations:** Occasionally finds the portal lacking in advanced analytics, requiring manual workarounds to gather and analyze data.
- **Employee Resistance:** Faces challenges with employee adoption of new portal features, necessitating training and communication strategies to drive engagement.
- **Data Overload:** Balances large volumes of data and metrics, which can be overwhelming without clear visualizations and streamlined reporting.
- **Audit Compliance Pressure:** Must ensure all benefits and payroll processes meet regulatory and audit requirements.
- **Change Management:** Works to align IT, finance, and HR teams during system updates or policy changes to minimize disruptions.