



Laura Evans
JENSEN & MORRIS

STAR EMPLOYEE WITH ADDED DUTIES

Age

34

Position

Accountant

Level of Tech Literacy

Average for age and position

Company Description

Jensen & Morris helps business owners keep what they earn. We pride ourselves on being trusted business advisors and treat our clients as partners rather than customers.

METICULOUS | AMBITIOUS | HELPFUL

MOTIVATION

AUTOMATE FOR A STREAMLINED WORKDAY

Laura wants to improve productivity at all levels of the organization. She needs to cut down hours dedicated to low-value, redundant, and time-consuming tasks. Laura wants to automate these processes.

HIGHER-QUALITY COLLABORATION

Employees at Jensen & Morris often work together on projects and need documents accessible company-wide to facilitate collaboration. And clients need to provide a variety of financial documents to the company while providing information not always included in those documents. Laura's solution would have a way to collaborate across the board.

TURN-KEY SOLUTION

Laura needs her problems fixed yesterday, so a solution would have to be quick to implement and easy for her and her colleagues to learn. Anything the software provider could do for them to ease and speed onboarding would be appreciated.

BEHAVIORS

DISTINGUISHED AMONG COLLEAGUES

Laura outshines her coworkers, and everyone

recognizes her attention to detail. Others come to her for help, and management thanks her for her hard work. Being tasked with finding a new software system is the first larger recognition for her excellence, and she wants find the perfect solution.

TOO HELPFUL

Laura is incredibly competent. She does her work well and quickly, but a lot of her time is taken up by her coworkers who want her help.

GOALS

FOCUS ON CLIENTS

Prioritizing clients over paperwork is key to business growth. Laura wants to maintain good relationships with existing clients and have more time to work with new clients. Automation can eliminate the human errors that irritate clients, while giving Laura and her coworkers more time to provide quality service.

BALANCE ACCESSIBILITY WITH SECURITY

Clients trust Jensen & Morris with sensitive financial information, and Laura is concerned about safeguarding that information. She'd love a digital, centralized hub that includes protections against unauthorized access and edits, and tools to support compliance with various laws and ethi-

cal guidelines.

ENABLE EMPLOYEE SUCCESS

Jensen & Morris is only as capable as its least capable employee, and Laura's software solution must lead to overall improvement- creating a level of consistency in organization, document creation, and workflow speeds across the entire company and making it easy for everyone to create, retrieve, and analyze documents.

I want a software solution that acts like a magic wand to give me all the information I need when I want it and provide the security that no one can hack, but stays active with no hiccups.

KEY FEATURES

WORKFLOW, APPROVALS, AND DOCUMENT TRACKING

At Jensen & Morris, some documents have to make a lot of stops. Some require multiple approvals, some need multiple employees to complete different tasks, and nearly all need a record of every view and edit.

SECURE COLLABORATION

Dealing with clients' sensitive information is a large portion of what Laura and her coworkers do. They need a secure portal through which clients can provide information, and for employees to share documents with (or restrict documents from) each other.

FULL TEXT SEARCH

The large volume of documents in their system means Jensen & Morris will need flawless full-text search, both for day-to-day tasks, and for audits and inquiries.