Mitch

Age: 36

Occupation: Sales Rep

Location: Gurnee, IL

Archetype: Small Retail Roofing

"I care about the two things I'm going to pick up, which are the first check and the last check."

ROLE IN THE INVOICE PROCESS

Mitch is a salesman for a small retail roofing company in the town he lives in. Mitch wears many hats in his company because of its small number of employees. He often begins in the office and receives a call from a potential customer to come take a look at their roof and give them a quote. In a larger company, they would have another person inspect the roof, but Mitch also goes out to the sites and inspects the damage. Mitch will get an aerial measurement of the house and create an estimate for the homeowner.

Many of his customers have to finance the job because they cannot afford to pay the entirety at one time. Mitch sits down with the homeowner and walks them through their financing options and shows them the total amount for the job. Mitch wants to collect this money as fast as possible so he asks for half of the job amount now and then he will ask for the other half once the materials have been delivered.

Once the job is complete Mitch is expected to create an invoice for his customer because he only has a small office team. The customer often asks him for a paid invoice after a certificate of completion is signed. Mitch usually has to go back to the office to generate an invoice and then call the customer to ask for the email they would like it sent to. A feature in the mobile app that allowed him to do this would save him a lot of time.

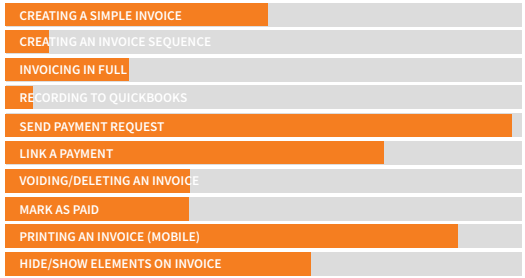
GOALS:

- Collect as much money towards the job as fast as possible.
- To learn the ins and outs of the roofing process so that he can one day start his own roofing company.
- Establish a lasting relationship with his customers so that they are comfortable talking to him throughout the project.

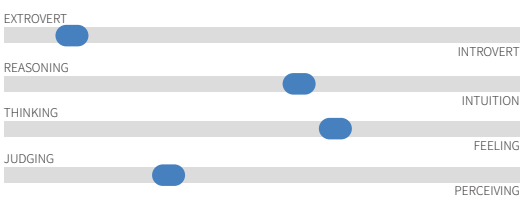
FRUSTRATIONS:

- When there is something he doesn't know how to do or how to answer.
- When he is spread too thin amongst his customers and cannot not meet all their needs or answer all their questions.
- When he doesn't get to be a part of the financing portion of the job.

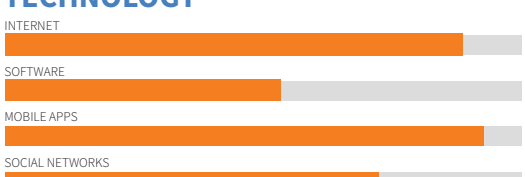
NEEDS



PERSONALITY



TECHNOLOGY



BRAND

patagonia

Jeep

GNC LIVE WELL

ESPN

Arthur

Age: 53

Occupation: Sales Rep

Location: Madison, WI

Archetype: Large Insurance Roofing

"All I know is that I'm here to sell and make the company money. "

ROLE IN THE INVOICE PROCESS

Arthur is a salesman at a large insurance roofing company. His main objective is generate leads and sell roofing repair or replacement jobs to customers. Arthur will often go soliciting and/or door-knocking in order to try to generate leads for his company. Once he generates a lead he will contact an inspector from his company to come verify the damages and Arthur will then generate an estimate using EagleView aerial measurements.

After he creates an estimate, he will schedule a meeting with the homeowner and the insurance adjuster at the job site. Arthur presents them both with a scope of work and after it has been approved, the adjuster creates his own estimate along with a check for the homeowner. Arthur will often take two checks from them in the beginning, one for the deductible, and the other one is the check the insurance gave the homeowner. All mortgage owners must sign the check so Arthur then asks the homeowners permission to send the check to have the lender sign it and then they send it back to the homeowner. Arthur then collects that signed check from the homeowner and passes it off to his office team to update QuickBooks and their customer portal.

Once the job is complete, he makes sure the customer is pleased with the job and has them sign a certificate of completion and provides them an invoice for the work that was done and what they still owe. Arthur sends that certificate of completion and scope of work to the insurance company so that they can send out the depreciation check to the homeowner. He does not get paid until that last check is collected so he reaches out to the homeowner a lot until he receives that final check. He then will send the customer a paid invoice that lists the work that was done and the payments made.

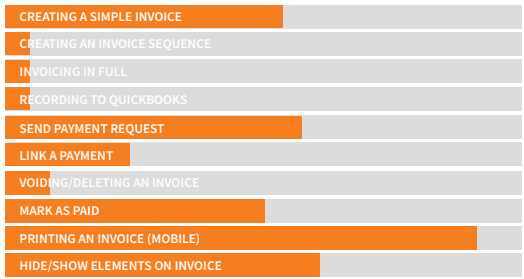
GOALS:

- Concentrate on making sales and bringing in new leads.
- Establish a good relationship with his customers so that they feel comfortable reaching out to him and asking questions.

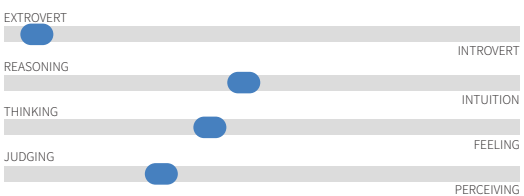
FRUSTRATIONS:

- When he has to handle other parts of the job and can't focus on selling.
- When the insurance companies do not cooperate with him.

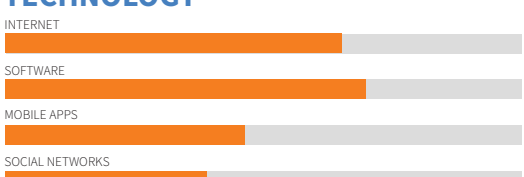
NEEDS



PERSONALITY



TECHNOLOGY



BRAND

Chuck

Age: 62

Occupation: Production Manager

Location: Madison, WI

Archetype: Large Insurance Roofing

“Our company flourishes when everyone sticks to their job’s specific responsibilities.”

ROLE IN THE INVOICE PROCESS

Chuck is the production manager for a large insurance roofing company. He manages a team of over 100 Acculynx users for the company. In order, for his team to remain organized and efficient, he makes sure he clearly states the responsibilities for each role within the company so that everyone sticks to their specific job. Through his experience, Chuck has found what systems and strategies are the most logical and economical to manage his employees.

Chuck can often be found in the office approving scopes of work, sending checks to the bank, and recording jobs into QuickBooks. He has been with the company a long time and likes things done a certain way. He insists his office team creates the invoices for jobs because he has worked with them to create the invoices just the way he likes them. The company he works for is very large and they manage a lot of jobs, so sometimes Chuck will go himself to the customers’ houses to pick up the checks to help his sales team out. However, most of the time he expects his salespeople to be the main contact for the customers to reach out to for any questions or concerns.

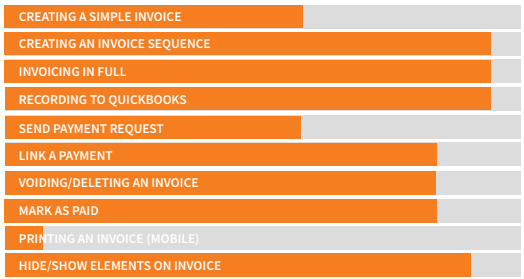
GOALS:

- Manage his team in an efficient and economical way.
- Keep everyone’s roles in the company clear and have everyone stick to them.
- Only create invoices in the office to make sure they are uniform and precise.
- Ensure his sales team are the main source of contact for the employees and can answer any of their questions.

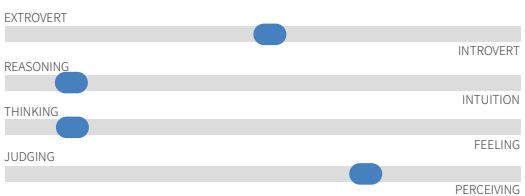
FRUSTRATIONS:

- When his employees try to take on too many responsibilities.
- When his sales reps take care of the payments or invoices for the job.
- When his sales reps do not establish a good communicative relationship with their customers.

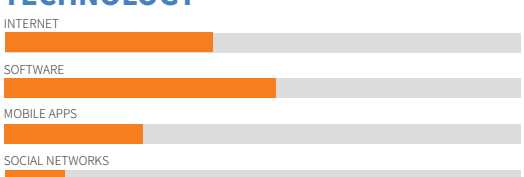
NEEDS



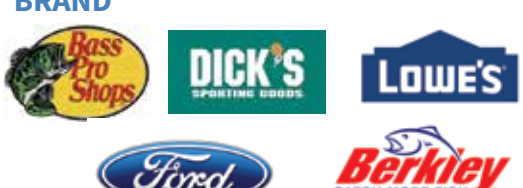
PERSONALITY



TECHNOLOGY



BRAND



Mandy

Age: 41

Occupation: Production Manager

Location: Gurnee, IL

Archetype: Small Retail Roofing

"My workers wear multiple hats, but we try to keep our finance work to the office."

ROLE IN THE INVOICE PROCESS

Mandy is the production manager for a small retail roofing company in the suburbs. She manages a team of 5-7 Acculynx users for the company. In order, for her small team to keep up with the amount of work they take on, her employees have to wear many hats. Mandy emphasizes collecting the money for a job as fast as possible so she encourages her sales team to use partial billing to collect as much money as they can before the job is done.

She expects her sales team to not just make the sale, but do inspections and handle some of the billing responsibilities as well. Mandy works from the company's office and likes to manage the billing and payments for jobs herself, but she is often spread too thin and will ask her sales team to make invoices for their jobs themselves.

She keeps in close contact with all her employees because she has discovered communication with her team is one of the key contributing factors to their success. Although, she has her sales team occassionally create the invoices for her, she still wants to review all job materials and give it her stamp of approval. Mandy is responsible for recording the jobs to QuickBooks and taking care of all payments from the job.

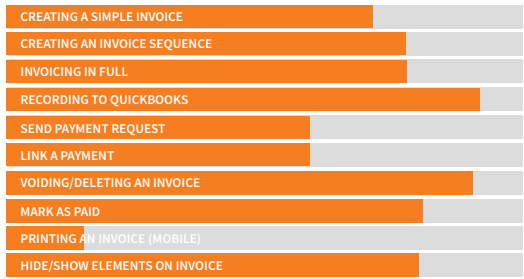
GOALS:

- Instruct her employees on handling responsibilities across multiple disciplines within a job.
- Staying organized despite balancing lots of jobs with a small team.
- To have constant, healthy communication with her employees at all times.

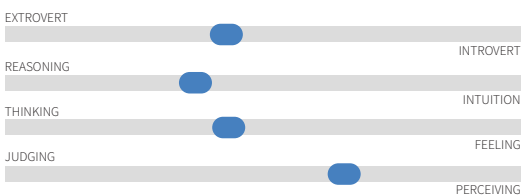
FRUSTRATIONS:

- When she doesn't get important job details and financial information run by her.
- When they have to wait for the job to be complete to collect most of the money.

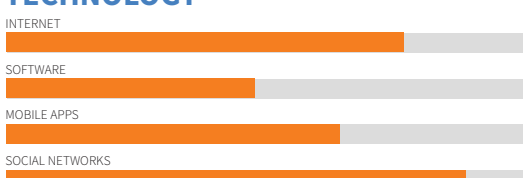
NEEDS



PERSONALITY



TECHNOLOGY



BRAND

REI co-op · The North Face · Mercedes-Benz · TLC · National Geographic · Pearl Jam

ARTHUR'S INVOICE JOURNEY MAP

Age: 53

Occupation: Sales Rep

Archetype: Large Insurance Company

Scenario:

I need a way to give my customer a financial summary of all the job's invoices and the payments that have been made up to this point.

Expectations:

- It includes all invoices and payments within the statement that are associated with that job.
- A current job balance is present so the customer knows how much they currently owe.
- A way for me to send that statement directly to the customer if they request it.

Motivation

Goal: Arthur has been asked several times by different customers if they could have a rundown of all of their invoices and payments.

Actions:

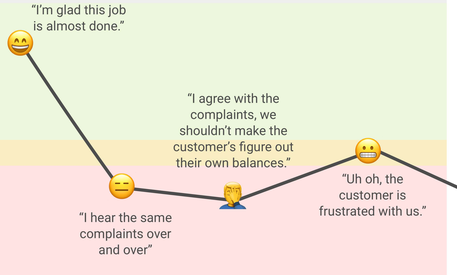
- Speaks to customer
- Listens to customer's complaints/concerns
- Tries and fails to accomodate their needs

Pain Points:

- The customer does not know where their financial balance stands.
- The customer has to keep track of all invoices provided to them and calculate their remaining balances themselves.
- I need a better way than just sending customers individual invoices.

Touchpoints:

Desktop App | Mobile App | New Lead Form | Contacts | Estimation



Problem Definition

Goal: Arthur speaks with customer to understand the reasoning behind their request and specific needs around their request.

Actions:

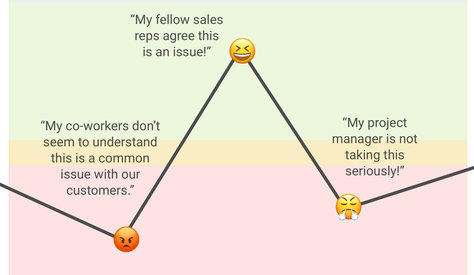
- Speaks to customer to understand why they want/need this summary.
- Inform their production manager of the customers' requests.
- Informs the rest of the team about the problem they are seeing regularly.

Pain Points:

- My team doesn't always agree that this is an issue worth the time to solve.
- It can be difficult to emphasize the importance of this issue to the team enough for them to develop some customer empathy.

Touchpoints:

Mobile App | Job Pipeline | Contacts



Action

Goal: Arthur needs to send a financial summary to the customer that includes their remaining balance.

Actions:

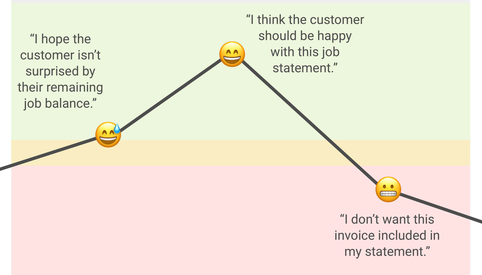
- Review all customer invoices and payments to determine what their remaining balance is.
- Create a document that the customer can have that addresses all the needs they brought up to him.
- Send the document to the homeowner that includes all relevant info.

Pain Points:

- I need to have the proper customer contact information to send the document. 💡 *"Opportunity"*
- Having some invoices or payments included that are not wanted on the document. 💡 *"Opportunity"*

Touchpoints:

Mobile App | Estimation | Financial Worksheet | Invoicing



Validation

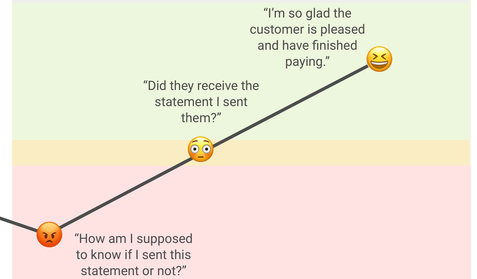
Goal: Arthur needs a way to ensure the statement has been sent to the customer.

Actions:

- Reaches out to customer to let them know statement has been sent.
- Answer any final questions the customer may have.
- Collect final check for the job.

Pain Points:

- I need a way to know if my statement has been sent to the customer. 💡 *"Opportunity"*
- How will I know when the final payment has been made? 💡 *"Opportunity"*

Touchpoints:

Desktop App | Payments | Invoicing