



Revenue Manager User Personas

Sharon Wasserman

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Park Place Technologies:

Tim Ryder: Revenue Accountant

Jen Zagari: GL Accountant

Tyler Technologies:

Jeff Matthews: Director of Revenue

Sandy Holt: Corporate Controller

Kyle Bernatis: Senior Manager, Revenue Assurance

Chris Peterson: Power User / Admin

Christine Wall-Lacombe: GL Accountant

Michael Wafford: Revenue Accountant

Steve Kovac: CFO (His role at Tyler is Corporate Project Manager for the ASC 606 initiative)

GL Accountant – Park Place



Name: Jennifer

Age Range: 19-24 25-35 36-49 50+

Family: Married with one child

Languages: English

Education: Some college

Experience and training: 12 years at Park Place and 8 years as a GL Accountant

IT Skill Level: Advanced Intermediate Basic

Average hours web use: 2-3 hours/day

Favorite websites/mobile apps: Social media

Years using Softrax: 2

Level of Softrax experience: Super-user Intermediate Novice

Social media used: Facebook LinkedIn Instagram Snapchat
 Pinterest Twitter Google+

ATTITUDE TOWARD TECHNOLOGY

Great – it's easy to use and saves me time

I like it, but it often falls short

I don't like it but I have to use it

Other Tools Used: Great Plains, CRM, ADP for time sheets, Outlook, MS Office, browsers

IT Equipment: Laptop, smart phone, printer

NATURE OF BUSINESS

Industry: 3rd Party data-centered hardware maintenance

Company Size: Hundreds

Name: Park Place Technologies, \$150 - \$200 million annual revenue

Work Environment:

- Cubical
- Home

How is Your Job Measured: Meeting closing deadlines

Reports To: Revenue Manager

Colleagues:

- Staff accountants
- Invoice team (a lot)
- Sr. accountants

Job Responsibilities:

- Reconciling revenue
- Maintenance revenue
- Reconciling deferred revenue

Key Tasks:

- Journal entries
- Ratio analysis
- Special requests like compiling data and auditor requests

Most often used functions:

- Running reports
- Importing data
- Closing periods
- Running journals
- POB setup
- Billing matching
- Credit matching
- Editing templates

User Frustrations with Application:

- No complaints. She thinks the app is "very user-friendly."
- She likes the alternating row background colors in the tables.
- Green is her favorite color.

How will this person use the application?

- Uploading data
- Some manual entry (mostly automated)
- Smoother auditing
- Big time saver

What input helps this person make a decision?

Reports determine decisions as to reconciling contracts and balances and fixing errors

Sr. Developer of Finance – Park Place



Name: Tim R.

Age Range: 19-24 25-35 36-49 50+

Family: Divorced with kids

Languages: English

Education: Masters in Accounting Systems

Experience and training: 18 yrs. in current roll. Training in advanced accounting, theoretical accounting, angular,

software languages, software development, best business practices, economics, and quality improvement

IT Skill Level: Advanced Intermediate Basic

Average hours web use: 7 hours/day

Favorite websites/mobile apps:

- CNet
- Google
- Viber
- Facebook
- CNBC
- NY Times
- Facebook
- Messenger
- Yahoo
- Bloomberg
- Email

Years using Revenue Manager: 2.5 years

Level of Softrax experience: Super-user Intermediate Novice

Social media used: Facebook LinkedIn Instagram Snapchat
 Pinterest Twitter Google+

ATTITUDE TOWARD TECHNOLOGY

- Great – it's easy to use and saves me time
- I like it, but it often falls short
- I don't like it but I have to use it

Other Tools Used:

- MS Office
- Oracle
- SQL Server
- BBA, BB
- Web Services
- Ultra Edit
- DOS
- PL SQL
- Crystal
- PeopleSoft
- Notepad
- Unix
- Javascript
- Cognos
- Link Toy
- Visio
- SQL
- HTML
- Actuate
- Connectivities

IT Equipment:

- iPod
- Mobile phone (\$10 cheap phone/not a smart phone)
- Laptop
- Wireless

NATURE OF BUSINESS

Industry: 3rd Party data-centered hardware maintenance

Company Size: Hundreds

Name: Park Place Technologies, \$150 - \$200 million annual revenue

Work Environment:

- Cubical
- Internet cafe
- Home
- Client's office for site work

How is Your Job Measured:

- How well he teaches people what they need to know to do their jobs.
- Number of errors when implementing software, processes and new ideas

Reports To: Chief Accounting Officer

Colleagues:

- Controller
- Different people in different departments
- Managers
- Directors
- Chief Accounting Officer

Job Responsibilities:

- Explain ideas to the auditors and accountants so the ideas can be realized
- Develop engineering methodologies to realize concepts
- Software implementation
- Project management
- Create formulas/math for algorithms
- Developing different types of accounting systems

Key Tasks:

Tasks based on the project he's working on

Most often used functions:

- J Reporting
- Workflow "toy" that's coming
- Price books
- Dashboard
- Reporting methodologies for quick response and information for better decision-making
- Mapping techniques

User Frustrations with Application:

- Wants a simple/basic search
- He wants a search field to appear right above or below the item he's on (i.e., a POB)
- Quick search should be for more complex searches/filtering
- Customizable search for each customer via app configuration
- Once he runs a quick search, can't go back to the results.
- Menu naming is confusing (i.e., POB vs. POB Mapping). Names and lists are too similar.
- Too much of a learning process instead of being intuitive (related to the menu)

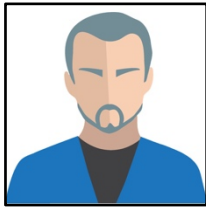
How will this person use the application?

- More reporting
- Dashboard a lot more
- Turning data into a warehouse for a different level of analysis
- Looks at the architecture design and how he can mesh it with their company's philosophies about revenue transactions.
- Quick integration of an acquired company

What input helps this person make a decision?

- Discussions with co-workers
- Accounting & software literation
- Input from authority figures inside and outside the company

CFO – Tyler Technologies



Name: Steve K.

Age Range: 19-24 25-35 36-49 50+ (60)

Family: Married with kids and grandkids

Languages: English

Education: Bachelor of Bus. Accounting, IT minor

Experience and training: CPA

IT Skill Level: Advanced Intermediate Basic

Favorite websites/mobile apps: Nest, Ring, Outlook

Years using Revenue Manager: 1.5 years

Level of Revenue Manager experience:

Super-user Intermediate Novice

Social media used: Facebook LinkedIn Instagram Snapchat

Pinterest Twitter Google+

ATTITUDE TOWARD TECHNOLOGY

Great – it's easy to use and saves me time

I like it, but it often falls short

I don't like it but I have to use it

Other Tools Used:

- IM
- Outlook
- Skype
- MS Office
- GoTo Meetings
- Edge browser

IT Equipment: Desktop, laptop, mobile device, printer, networked, wireless

NATURE OF BUSINESS

Industry: Software for government financial management

Company Size: Thousands

Name: Tyler Technologies, \$1 billion annual revenue

Work Environment:

- Office at work
- Home

How is Your Job Measured:

- Success of a project
- Task completion

Reports To: Chief Accounting Officer

Colleagues: (works directly with)

- IT Controller
- Corp. Systems Administrator
- Treasurer
- Director of Revenue Assurance
- Director of Secure Reporting
- FPNA people

Job Responsibilities:

- Manages software process
- Oversees Softrax to new accounting

Key Tasks:

- Conference calls
- Project management
- Development of new plans
- Documents the tasks and process of completing them
- Consults with the team as to how to complete tasks
- Keeps people on schedule for their tasks
- Oversees the switch from the old software to Softrax

Most often used functions:

- He will look to his team to use it for most actions.
- He will look at raw data line by line to the lowest level only when there's an error.

User Frustrations with Application:

- Too many popups in the process of fixing errors
- Wants an indicator to display if there's an error
- Wants a comparison to a "norm" for the percentages (configurable)
- Wants actions to be more intuitive. Not sure what menu to look in for the action he needs to use.
- Softrax requires too much training to use
- He wants the software to keep him from making an error

How will this person use the application?

Dashboard most of the time to look for key performance indicators that will let him know if he's over or under budget.

What input helps this person make a decision?

Reports and reviewing high-level data

Sr. Mgr., Rev. Assurance – Tyler Technologies



Name: Kyle B.

Age Range: 19-24 25-35 36-49 50+

Family: Married with kids

Languages: English

Education: Masters of Science in Accounting

Experience and training: 1.5 years in this role

IT Skill Level: Advanced Intermediate Basic

Average hours web use: 6 hours/day

Favorite websites/mobile apps: Gmail

Years using Revenue Manager: 1.5 years

Level of Revenue Manager experience:

Super-user Intermediate Novice

Social media used: Facebook LinkedIn Instagram Snapchat

Pinterest Twitter Google+

ATTITUDE TOWARD TECHNOLOGY

Great – it's easy to use and saves me time

I like it, but it often falls short

I don't like it but I have to use it

Other Tools Used: (i.e., email, office, elec. time sheet, browser)

- Outlook
- MS Office
- MPSA (Microsoft Products & Services Agreement)
- GoTo Meeting

IT Equipment

- Laptop
- Mobile device
- Printer
- Wireless (home)

NATURE OF BUSINESS

Industry: Software for government financial management

Company Size: Thousands

Name: Tyler Technologies, \$1 billion annual revenue

Work Environment:

- Office at work
- Home office

How is Your Job Measured:

- Amount of billings generated
- Cycle time
- Close cycle times (how quickly they close down a period or quarter)

Reports To: Chief Accounting Officer

Colleagues: (works directly with)

- The other Director of Revenue
- Manager of Revenue Assurance
- IT group

Job Responsibilities:

- Ensuring timely billing and revenue recognition
- Recognizing revenue
- Converting data to revenue manager
- Monitoring the flow of information to Revenue Manager

Key Tasks:

- Monitor billing volume
- Review deferred revenue
- Review knowledge items given to them for the business for deliveries
- Monitor billing cycle times to make sure they're producing adequate volume in the amount of time that's within their SLA

Most often used functions:

- Updating schedules and dates to match the 2 systems
- Running reports to determine things that are hold
- Reviewing deferred revenue

User Frustrations with Application:

- You can't tell where an order is from an overall perspective. Account balances don't flow up to the order group level so if he wants to see where it's at in the billing cycle he has to look at individual performance allocations that are underneath it.
- Transactions are cumbersome
- A lot of transactions don't do the full job. There are some types of forecasting we do where we'll assign new dates or new templates to it but then we have to run an additional transaction behind it to execute a forecasting when the original transaction should have done that.
- Lots of things that aren't intuitive (5 of 10 on the scale).
- Things happen when you would expect a warning or error message that doesn't exist like when he reverses out of a function.

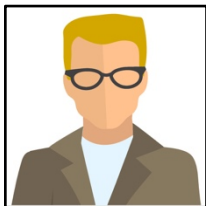
How will this person use the application?

His team will have the end users processing deliveries, uploading schedules, and changing dates directly in Revenue Manager

What input helps this person make a decision?

- Reporting on current revenue and deferred revenue
- Data analysis of current data deferred revenue
- Understanding data is in the system and what needs to be updated

Sr. Applications Admin. – Tyler Technologies



Name: Chris P.

Age Range: 19-24 25-35 36-49 50+

Family: Married (no kids)

Languages: English

Education: Bachelors in Mgmt. of Informational Systems

Experience and training: 8 years

IT Skill Level: Advanced Intermediate Basic

Average hours web use: 3 hours/day

Favorite websites/mobile apps: Facebook, Facetime, CNN, Readit

Years using Revenue Manager: 8

Level of Revenue Manager experience:

Super-user Intermediate Novice

Social media uzsed: Facebook LinkedIn Instagram Snapchat

Pinterest Twitter Google+

ATTITUDE TOWARD TECHNOLOGY

Great – it's easy to use and saves me time

I like it, but it often falls short

I don't like it but I have to use it

Other Tools Used:

- Outlook
- Ultra Edit
- Notepad ++
- Network
- Dreamweaver
- MS Office
- Notepad ++
- PS Developer
- Dos
- Peoplesoft
- MS Teams
- Visio
- JavaScript
- Oracle
- Dos
- Browsers
- Crystal
- HTML
- SQL
- Oracle

IT Equipment:

- Laptop
- Cell phone
- Printer

NATURE OF BUSINESS

Industry: Software for government financial management

Company Size: Thousands

Name: Tyler Technologies, \$1 billion annual revenue

Work Environment:

- Cubical
- Home office

How is Your Job Measured: (lead or revenue generated, team productivity)

- Projects completed
- Volume of tickets completed

Reports To: Director of Applications

Colleagues: (works directly with)

- Other applications administrators
- End users
- Account & finance team

Job Responsibilities:

- Ensuring apps are running as expected
- Making sure finance as what it needs to get the books closed on time
- Report creation
- Integration between apps

Key Tasks:

- App maintenance
- Creating workflows
- Keeping up with audit requirements

Most often used functions:

- Reports
- Account mapping
- Running bill matches
- Importing data
- Running bill matches
- Director & forecast schedules
- App setup
- Setting up products

User Frustrations with Application:

- The app needs informational prompts and warnings for when a user's action will unwind something else s/he has done
- Navigating back from a POB and other levels is difficult.
- He wants to see what period an item is posted to
- Currently there is no way to see when something has posted when he back-dates it.

How will this person use the application?

- More error handling
- Implementing new processes
- Helping accounting get the team up to speed in using the app

What input helps this person make a decision?

- Urgency of an issue (ticket)
- Having all the information about a process – where it is presently and where it needs to go.

Revenue Assurance Mgr. – Tyler Technologies



Name: Michael W.

Age Range: 19-24 25-35 36-49 50+

Family: Married with grown kids

Languages: English

Education: BA in accounting with a minor in IT

Experience and training:

(time in role, skills/training acquired, achievements)

IT Skill Level: Advanced Intermediate Basic

Average hours web use: 5-6 hours/day

Favorite websites/mobile apps: Facebook & mobile banking

Years using Revenue Manager: 1.5 years

Level of Revenue Manager experience:

Super-user Intermediate Novice

Social media used: Facebook LinkedIn Instagram Snapchat

Pinterest Twitter Google+

ATTITUDE TOWARD TECHNOLOGY

Great – it's easy to use and saves me time

I like it, but don't spend a lot of time on it – just to get things done

I don't like it but I have to use it

Other Tools Used:

- Outlook
- MS Word
- MS Excel
- Lotus 123 spreadsheets
- DOS spreadsheets
- Browsers

IT Equipment

- iPad
- Multiple monitors
- Laptop
- Mobile phone
- Printer
- Wireless (home)

NATURE OF BUSINESS

Industry: Software for government financial management

Company Size: Thousands

Name: Tyler Technologies, \$1 billion annual revenue

Work Environment:

- Cubical
- Home

How is Your Job Measured: Accuracy & productivity

Reports To: Sr. Revenue Assurance Manager

Colleagues:

- Billing Manager
- Sr. Analyst
- Another Revenue Assurance Manager

Job Responsibilities:

- Resource management
- Workflow management
- Review management for accuracy

Key Tasks:

- Reviewing open items for the team
- Team scheduling
- Reviews of items of \$500,00+

Most often used functions:

- Upload templates for order data
- Manually running forecast true-ups
- Releasing holds
- Pausing POBs
- Adding conditions
- Forecast utilities
- Process utilities

User Frustrations with Application:

- Wants to use the return/enter key to submit information
- When editing an order, instead of having to go back to the contract to select the next line item, he wants to be able to scroll to the next list item in sequence or a "next" button.

How will this person use the application?

- Changing forecasts
- Reviewing & downloading reports
- Editing data for accuracy (drills down to POB level)

What input helps this person make a decision?

- External input in the form of PSA info. and billing notification site.
- Ad hoc input

GL Accountant – Tyler Technologies



Name: Christine

Age Range: 19-24 25-35 36-49 50+

Family: Single with kids

Languages: English

Education: BA in Accounting

Experience and training: 5 years with Tyler / 4 weeks in current role

IT Skill Level: Advanced Intermediate Basic

Average hours web use: 1-2 hours/day

Favorite websites/mobile apps: Facebook and mobile banking

Years using Revenue Manager: 5

Level of Revenue Manager experience:

Super-user Intermediate Novice

Social media used: Facebook LinkedIn Instagram Snapchat

Pinterest Twitter Google+

ATTITUDE TOWARD TECHNOLOGY

Great – it's easy to use and saves me time

I like it, but it often falls short

I don't like it but I have to use it

Other Tools Used:

- Outlook
- Excel
- Word
- Epicor
- Payroll software
- Browsers

IT Equipment (desktop, laptop, mobile device, printer, networked, wireless)

- iPad
- iPhone
- Wireless (home)
- printer

NATURE OF BUSINESS

Industry: Software for government financial management

Company Size: Thousands

Name: Tyler Technologies, \$1 billion annual revenue

Work Environment:

- Cubical
- Home

How is Your Job Measured: Making deadlines

Reports To: Account Manager

Colleagues: (works directly with)

- Staff Accountant
- Payroll people
- Finance people
- It people
- Revenue Assurance
- AP people
- Auditors
-

Job Responsibilities: (same as Key Tasks)

Key Tasks: (list at least 3)

- Reviewing journal entries
- Reports
- Manipulates data into easier to read formats
- Creates summary reports

Most often used functions:

- Reviewing journal entries
- Reports
- Manipulates data into easier to read formats
- Creates summary reports

User Frustrations with Application:

- "If you know what you're looking for, you can get around"
- Look & feel is ok
- Using Crystal is easier because she doesn't have to "reinvent the wheel," meaning the way you manipulate data. She wants to be able to have multiple text on the same line of a report (customer name and ID number instead of just one per line).
- Wants to be able to configure the layout of a report
- Reports take too long time to download (not to generate)

How will this person use the application?

- Upload data
- Accessing data for review
- Creating GL reports
- Making sure posted items display correctly in the app.
- Downloading month-end reports

What input helps this person make a decision?

Data postings (correct or incorrect)

Permissions Used by Personas:

Persona	Permissions
C-level	Full
Admin	Full
Actuary	Full Edit
Sr. Accountant	Full Edit
Jr. Accountant	Add only
Reviewer	Read only
Assistants	Read only