The Jill of All Trades
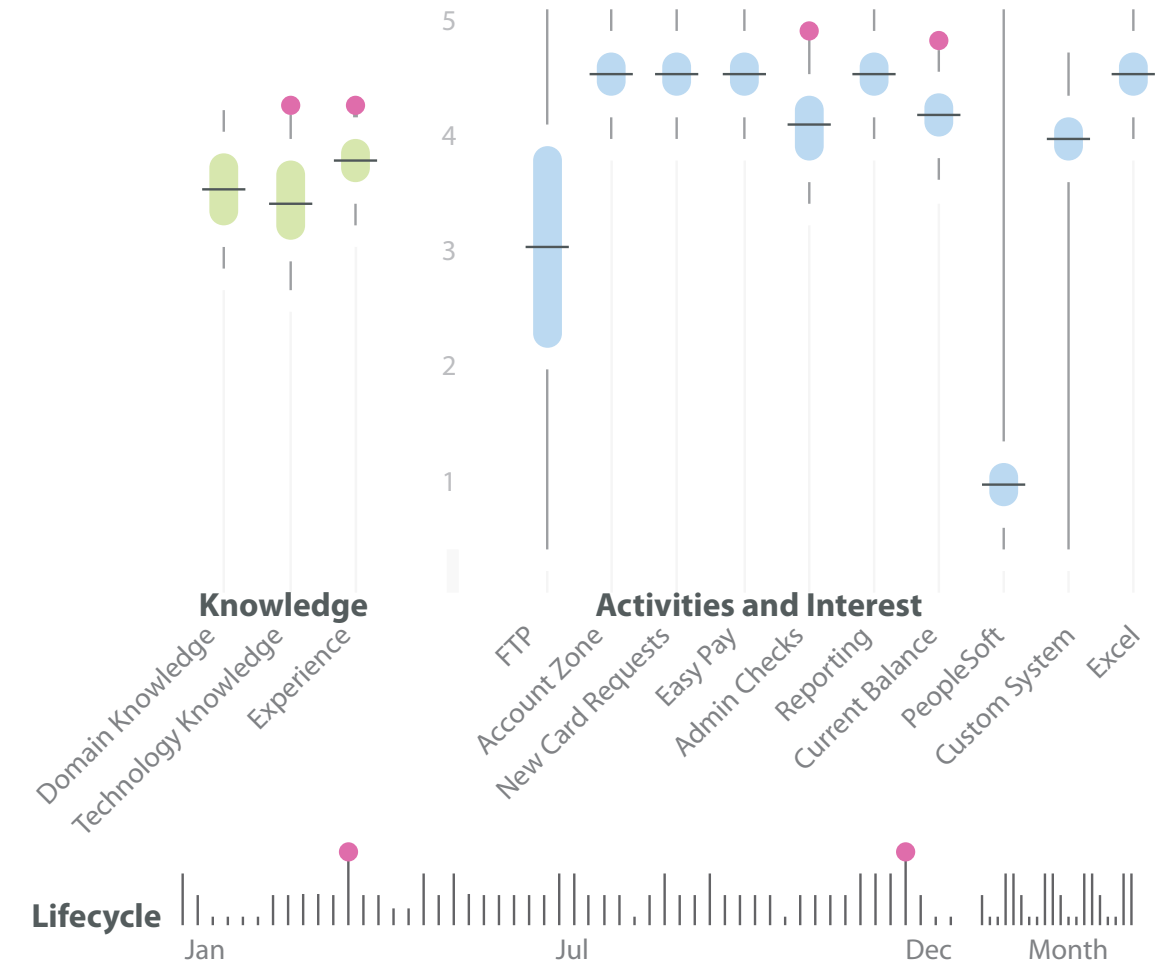
Amanda Stone

Age: 28-55

"I have to manage multiple programs for my clients."

AMANDA SHARES THE INCENTIVE PROGRAM RESPONSIBILITIES WITH A FEW OTHER colleagues. They share access and manage multiple programs for clients. This can be particularly challenging to make sure she's paying the right people on the right program. She needs to be able to switch between the different programs and know where she's at at all times.

Account Zone really helps her issue new cards and make sure the program participants are paid quickly. The one thing she's missing is the ability to look at each individual program as well as across all the programs she's running to see how things are going. Her clients like to keep tabs on how the programs are performing. Right now she tracks that in Excel. She ends up either sending the Excel file to her clients, or sometimes exporting them and sending a PowerPoint with some nice charts in it. If Account Zone had a way to let her run reports on individual programs and across multiple programs that would be really awesome.

She uses Account Zone pretty regularly–several days a week. And since she's managing multiple programs, she's pretty active all year round.

Knowledge — Domain Knowledge, Technology Knowledge, Experience

Activities and Interest — FTP, Account Zone, New Card Requests, Easy Pay, Admin Checks, Reporting, Current Balance, PeopleSoft, Custom System, Excel

Lifecycle — Jan, Jul, Dec, Month

Key Characteristics
- Manages multiple programs
- Medium to large company
- Moderate volume (50-2000+ orders at a time)
- Multiple people sharing a single role
- 70/30 Quick Pay and Admin Checks
- Weekly to bi-monthly usage
- Year round
- Very interested in reporting
- Wants to run reports across programs
- Heavy Excel use
- Custom internal system to interface with

Goals
- Pay employees quickly and easily.
- Prevent duplicated efforts.
- See what their current balance is to know if they need to wire money.
- Track transactions weekly, bi-monthly, month, quarter, and year.

Questions
- How do I run reports across all my programs?
- Is there a way to get my login info without having to call Ecount?
- Can we integrate with ClientZone some way so that we don't have to go back and forth so much between different applications.
- Am I doing it right?

Influencers
- Integration with current system.
- Ability to pay employees quickly and easily.
- Cost (mostly time).
- Guided help.

Other Applications
- Excel
- PowerPoint
- Internet Explorer

Frustrations & Pain Points
- Can't look across multiple programs at once.
- Can't run reports across multiple programs at once.
- Correcting errors in the eception file "stinks".
- Knowing what the exact problem is and how to fix it isn't clear.
- Multiple steps with multiple applications isn't efficient and makes it easy to "get lost" where she is.
- Multiple confirmation screens.
- Another username and password to remember.
- Finding email with her login information.