THESIS – BACHELOR'S DEGREE PROGRAMME

SOCIAL SCIENCES, BUSINESS AND ADMINISTRATION

FINANCIAL MANAGEMENT USER PERSONAS IN SHARED SERVICE CENTERS

Case Study For Visma Public Oy

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THESIS

Abstract

Field of Study Social Sciences, Business and Administration	
Degree Programme Degree Programme in Business and Administration	
Author(s) Noora-Anniina Varis	
Title of Thesis Financial Management User Personas In Shared Service Centers	
Date 21.11.2021	Pages/Appendices 35
Client Organisation /Partners Visma Public Oy	

Abstract

The primary aim of this research was to find financial management user personas in shared service centers for the commissioning company, Visma Public Oy. Visma Public Oy is a subsidiary company of Visma Group that produces software and other solutions for public and private sector companies. These customer companies' scope of operations includes fields such as finance, payroll and personnel management. Visma has a great number of offices around Fin land employing over 1 500 employees.

The objectives of this thesis were to research theoretical information about B2C and B2B personas from literature and other resources as well as to be able to conduct interviews within the client companies of Visma Public Oy. Ap plying all the gathered data, action-based approach was implemented by developing user personas for shared service centers for the use to the commissioning company.

The theoretical information of this thesis was gathered from different resources, ranging from literature to internet publications. Information discussed in the thesis contains subjects from service design, a value proposition as well as UX design and personas.

In conclusion, the finished personas were made for the use of Visma Public Oy but can be also utilized in their client companies. The aforementioned personas were designed for Visma Public Oy in view of serving as an updatable element that can be modified in the future to suit their needs in product development, as well as other uses.

Keywords

B2C personas, B2B personas, user personas, jobs to be done

LIST OF FIGURES

1 INTRODUCTION

This thesis focuses on creating user personas in shared service centers, which are client companies of the commissioning company. The aim of this thesis is to create functional personas as well as their jobs to be done, which will be used in the commissioning company's product development and marketing purposes. The personas will work as a guideline and a common object for Visma Public Oy as well as their customers, where it helps to aim different teams to work with a similar targeted goal, which corresponds to the purpose for which Visma Public Oy has commissioned this thesis.

Personas are not by all means a ''final product'', and these are made available for Visma Public Oy, so that it is possible to update the persona profiles constantly to suit the needs of the organization and their product development in the future as well. Personas will be a living and moving element in the commissioning company's product development as well as in its other operations together with shared service centers. Shared service centers in this thesis present companies that produce services for other companies, these services usually include human resources, accounting and payroll, among other operations.

The theoretical part of this thesis is based on service design methods, UX design, value proposition canvas and other available valuable information and methods relevant to user personas. Literature reviewed in this research consists of well-know and widely used theories of Service Design and Value Proposition Design, which both have introductions to personas and how the personas are used in terms of product and service development. Supporting literature, multiple different resources and publications about the subject is reviewed and applied.

Theoretical part of this thesis presents user personas, the differences between user personas in business to customer and business to business organizations. Jobs to be done has been also introduced and reviewed. These findings have been summarized into a matrix format.

The research method chosen is interviews, which will be based on pre-made personas. The questions are sent beforehand to the interviewees, as well as the drafted personas. The interview is based on the conversation evolving from the interview questions. The interviews are conducted in accordance with the commissioning company's wishes.

The findings from the interviews are used to creating finalized user personas, which are presented in the thesis. The personas include jobs of bookkeeper, invoicer and sales ledger, business controller, main user as well as accounts receivable manager. The main target was to find the jobs of the main user.

2 USER PERSONAS THEORY

User personas are tools that are used widely in service design, mostly in user-centred design. In multiple sources, personas were described mainly as the marketing mantra. This Is Service Design Doing (2018), defines personas as: '' a profile representing a particular group of people, such as group of customers or users, a market segment, a subset of employees, or any other stakeholder group. This profile is not a stereotype, but is an archetype based on real research.".

Archetypes are presentations of behavioural patterns, where similarities merge together. Archetypes are concentrated in the behavioural aspect: why people do, what they do? In multiple occasions, personas and archetypes are described as two different methods of customer research, where personas are more concentrated on characteristics and archetypes on behaviour and motivation. However, a synthesized model of these both is commonly used. (UX Collective, 24.6.2020.)

Personas are not real individual people, but rather a profile created from the real data that has been collected by, for example, interviews, questionnaires or other liable data, that has been collected from multiple different individuals. (The Interaction Design Foundation: Personas.) It is then important to notice that personas are not done by using what developers think they might be or other assumptions of the customer but are done by using a lot of research.

FIGURE 1. Example of a persona profile. (Chayka, 2017)

User personas are usually presented in an A4- or a 1-page-format, where personas name, picture, personal details and goals are presented. In FIGURE 1, is presented an example of a persona, and how it is presented. FIGURE 1 includes information about the persona from some general information as well as more detailed information. The format can vary between very detailed and more simple presentation. Sometimes user personas get mixed up with market segmentation, which aims towards identifying as well as finding new customers. User personas concentrate into their existing customers user experience journey and satisfying their needs, which is achieved by rapid alignment in the early steps in the designing process. (Konrad, 2021.)

Personas are made, so that organizations with different departments know which kind of customer they are working with and how to reach their desired target group. In the design process, personas work as a reference and a guideline. (Stickdorn et al. 2018, 40.) This is a great way of keeping the customer motives and needs in the minds of the developer, during the whole process of designing and creating the product from start to finish.

By creating personas, it helps companies to design their products and/or services by finding the target user, and what kind of motivations and expectations these target users have for the company. Faller mentions, that this way companies can have more deep understanding of the customer and therefore companies can prioritize developing their products and/or services towards being more useful for the end user. (Faller, 2019.)

For example, if a company has multiple teams working in the same field but have people with different skills and views on the strategy of the organization, a persona will be a common artifact, that creates a common understanding between the team members. By having personas, teams can find different problems and conclusions, from the different viewpoints and their skills by having a common object. (Stickdorn et al. 2018, 42.)

The persona description should be detailed enough, to serve the purpose of what it has been created for, therefore it does not have to include every aspect of a person's lifecycle or lifestyle. This means that the description should be written somewhat in a style that it describes a real person behind it. This way, it can be limited that the personas are not made for everyone or every company existing, but rather serves a purpose inside one organization. The details inside will then determine that if the personas are designed for a certain product, service or area of business inside the organization. (Nielsen Norman Group, 2015.)

A persona should not be describing user groups or market segments, instead it should examine and determine details and features inside of a specific group. The goal is to create a common type of describing a specific user of the product or service. One of the important steps is to avoid creating details that are irrelevant to the user and therefore will make the user less more memorable. Persona should have information on what kind of features will be relevant in product or service development and which of those will require prioritizing. To achieve most effectiveness, there should be only few personas that act as the main target in the research. This way, time is saved and not every single possibility for a different case is avoided. (Nielsen Norman Group, 2015.)

If we take a look on what would be meaningful for a company, of course in this case Visma Public, it is important that the user experiences are measured and examined in the point of view of the user of their software's and their products. Personas should be therefore created by looking at the different ways of using their software's and different needs that are required in that process. The question that is even emphasized in their webpage is that how the user works with the system, not how they work inside the software's. (Visma Blog, 2021.)

User personas also add to value proposition. Value proposition determines what makes the company's product or service stand out from other similar companies' offerings, why it is purchased by customers and why makes it attractive enough to potential customers. This value proposition is then addressed to potential customers, that usually are defined in market segments. Value proposition is a great way to influence customer purchase decisions and are used often in companies marketing operations as it is such an effective way. (Corporate Finance Institute)

The value proposition is usually created around a customer profile or from customer segments as well as a value map. A customer profile can be identified as a user profile, since the information remains quite similar, including information from their jobs as well as the pains and gains. Which regarding to this thesis, are the items that are searched in the user personas. Value map will identify as items such as what will help these pains and what will create more gains to the customer, as well as the products and services offered. (B2B International, b)

One company example that has utilized user personas in their product/service offering is Spotify. They started their process of gathering data and information for user personas in 2017. They aimed to creating user personas as they should be memorable, usable and believable. In FIGURE 2, the personas are presented side-to-side, showing the variety of them. They created he personas to look colorful and illustrated to match their branding, as well as to avoid making them too relatable as they are user personas that should be presented as archetypes of people. (Spotify Design, 2019.)

FIGURE 2. Spotify persona images. (Spotify Design, 2019.)

The immediate results from creating these personas at Spotify, was that everyone had the specific core goal that they all reached for. They could easily produce their ideas into reality, since they had something where to start their visions from. The time saved in the research was a large portion, which lead to that they could save time in the whole design process. The optimization of the already existing functions became easier, as they knew how it would work and which personas would function as the users. Since personas are a constantly moving element in company's core, Spotify is planning to continue research in new market areas as well as include new features, such as podcast-listeners to the persona listing. (Spotify Design, 2019.)

2.1 User Personas in B2C Context

A typical business to customer -persona is usually identified as an ideal customer for the company, where different personal details create a description of the ideal buyer and therefore creates a scenario for the company. In these scenarios, there are factors that create the scenario. These factors usually include items like gender, education, income, job, etc. (Miller, 2014) These ideal customers are usually the main target group that the company is targeting its marketing actions towards as well as finding the best ways to reach the customers. By focusing on ideal customers, brands are able to find the most suitable way to communicate with the customer, by asking questions like, should the message be more relaxed or should it include more in-depth information about the product or service, who uses the product and service and what kind of image the product or service wants to achieve.

Since there are more detailed information about the customer, the companies and organizations in that field can access information, which is then used in product development, marketing and advertising to create targeted products and services. Product development gets a guideline of what are the customers' needs and therefore can start developing their products towards more customer-oriented design. Marketing strategies and advertising are created with focus on the customer, their needs, preferences as well as activities. There is also a possibility to better customer service and support, since the company already knows its customer base. (Social Media Today, 17.10.2017)

In B2C, most common companies work in consumer goods or other way the customers are reached by advertising in social media or other more informal channels. (Relevance, 2013) Therefore, it is more important to use personal data in B2C, since it would be easier to reach a teen from social media than from a newspaper and vice versa.

A good user persona is a valuable tool to a company and their Human Resources. User personas can be used as a great tool for larger investments and project but can work as efficiently in a more day-to-day life as well. They can provide a lot of strategical ways to contact the target customers as well as find different learning methods and motivations, that can provide information about self-imposed behavior. (Helle, 2020)

The main function in B2C is to solve and response to needs of most of the average people, this could mean social, psychological or physiological needs. Meaning that the adaptation is usually based on their day-to-day lifestyle choices. The products or services are usually based on a theme or a subject of choice, a basic function. This could be anything from a food to a electronical device. Sometimes the designs might be already in use, and the markets are flooded with options of similar products. Therefore, making it more profitable can be difficult and require methods that add value to the product. This could vary from personalization, different deals or subscriptions as well as accessibility. The options are endless. (Woo, 2020) Woo mentions that there is a need for the products to stand out from the others, nowadays this could be something from sustainability as well as the quality and durability of the product.

2.2 User Personas in B2B Context

B2B personas, or business to business personas, are more defined teams that work in a company or organization, and usually are decision makers inside the organization. This could mean for example, buyers, owners or other, who make the decision on whether the product or service from another organization will be purchased. Instead of an individual making the decision, in business to business the purchasing decision is a larger factor, since it affects the whole organization. (B2B International, a)

Scott Anderson Miller (2014) also defines more detailed the B2B persona, where instead of defining the personal factors like in B2C, in B2B the persona defines more the roles inside the company as well as other characteristics that are more important to the company's strategy.

In business-to-business organizations, it is valuable to notice that there will be multiple personas instead of a one target group or a person. Meaning, that there is a need to understand multiple different positions and viewpoints, which create the whole company or department that is the target audience. (B2B International, a) However, every company will have a representative that takes care of all the communication between the companies during a sales process, meaning that there are real people working and presenting the company. These people can be varied in positions, genders and ages depending on the company, which therefore makes it difficult to suspect that which kind of communication style is needed, for example, a person from older generation might have more professional and structured style of negotiating and communicating. There are also differences in communication between genders, as well as people overall, where someone might present issues more straightforward and keep the conversation shorter and simpler, someone might be the total opposite and present the issues in more detailed or even get sidetracked into other subjects.

All in all, the product development process in B2B is more complicated compared to B2C. The purchases are part of the company's functionality or other systems, which takes more weighing of options, whereas in B2C the purchase process can happen in an impulsive moment. However, the designing process still remains similar, a need for the user has to be fulfilled. (Suter, 2021)

Another thing to keep in mind, is that the product or service you are offering for another organization is that those companies will have individuals or other organizations that are purchasing the end-products they have produced. (Sviridenko, 2019) The details are important to keep in mind, for example if organization is selling parts to a machine for another company, after that there will be a consumer or company that will later on purchase that machine that has been created using those parts. The parts that have been sold are big parts of the machine and will affect the functionality and the ways the machines are working. If the parts are bad quality and the quality is not that good, the consumers of the end-product will have to contact the company that has sold the machine often. If that happens, the possibility to continuing the co-operation between the organizations is weak, since the quality of the parts is not what they have expected.

User profiles can help organizations and companies to design their products being more functionable and adding special features, that might not have come up in the development process before. (Suter, 2021.) This could adapt to for example applications or software's, where the customers might have a specific need for a different feature or something is mostly done manually, which they want to be more automatized. Making the system features adaptable as well as create more space for other jobs they might have, freeing up time from the more basic manual jobs.

As in previous chapter, Andrea Woo mentioned that the business to consumer market will need more complex designs to bringing the products and services value and more importantly, something that separates it from the other similar products. However, in business to business, the product design will remain simpler. There is no need for trying to add fancy terms in the marketing process. The focus is to make the customer companies to understand the main functions of the product and how the functions will affect the work they do. There is a need to understand the industry they are corresponding to and how it will work after it has been implemented into it. (Woo, 2021.)

2.3 Differences In B2C and B2B and similarities

In the matrix below, the differences and similarities of B2C and B2B are presented in a matrix format. The matrix includes all the basic information of B2C and B2B, and finding similarities in those basic functions. The information includes facts that are usually included in a persona format.

Title	B2C	B2B	Similarities
Sex	Usually identified as female or male, to target specific products.	Company = Customer, which means that there is no need to identify the customer's sex.	The ways women and men communicate can differ; however, both aim towards neutral communication.
Age	Age groups can be identified to target specific products or services.	Age might affect the way of communication.	Age can define the way of communication between different age groups.
Family	In B2C, it is typical that the family status is identified. For example, no children, spouse, child, etc.	In B2B family status is not relevant.	
Marital Status	Usually, marital status is informed. For example, married, single, divorced, etc.	Typically, in B2B context, marital status is not identified.	
Personas	Personas are created by more personal information and needs.	Personas are created around the jobs to be done	Personas are created for most beneficial marketing actions.

Purchase decision	Purchases are more prone to be impulsive.	Purchases are made with research and other possible products, or services are compared.	Both decisions are value-driven and need customer services.
Sale cycle	Sales cycle is short.	Sales cycles tend to be longer periods of time.	Building trust in both cases is important to creating lasting customer relationships. Customer journey does not end after purchase.

FIGURE 3. B2B and B2C matrix.

2.4 Jobs To Be Done

Jobs to be done is a part of value proposition canvas, which is specified under the category of customer profile. When creating customer types, or personas, jobs to be done identifies what are their jobs. The value proposition should also include items like the pains and gains of their jobs. These pains and gains identify if there are any negative issues, such as risks or experiences inside the job and more positive issues like benefits, as well as hidden positives that might count as ambitions. (The Interaction Consortium, 2019)

Jobs to be done refer to that people buy products or services, to be able to get a specific job done. Therefore, companies have to gain understanding of what kind of need the customer associates to getting their job done with a desired outcome. (Medium, 2017) For example, a chef needs spices and ingredients to be able to prepare a dish, without these ingredients there is nothing to be served in a restaurant. The ingredients need to be specific ones, which makes it possible for the chef to cook dishes that are presented in the restaurant's menu. This applies to all jobs, there is a need for a certain element that allows to perform the task needed.

The most important question to ask is ''what job is my customer trying to get done?", and when this question is understood, the organization can aim towards innovating more efficient products and services to getting that specific job done. (The Interaction Consortium, 2018)

Value proposition design book identifies customer pains as anything that makes the job you are doing difficult, or annoying either before, during or after the job. These pains can include items from social, emotional and other aspects. Pains usually include obstacles, something that you need to do before starting the jobs or risk, that might include things about either in personal career or for the company. (Osterwalder, Pigneur, Bernarda, Papadakos & Smith, 2014. p.14)

Customer gains are defined in more detail, where gains are divided into four sections. Required are gains that are needed for the job to be able to get it done, expected gains are what the customers expect from the company, desired gains are one step beyond the expected, and usually specific functions in the product or service, unexpected gains are gains that are one step after desired and something the customers cannot expect from the company. (Osterwalder et al. p.16)

Sometimes using only user personas do not reveal enough about the customer motivations and needs, and the information can be limited. By using jobs to be done theory together with user personas, there is the benefit to discover more about what kind of jobs or tasks the customers are trying to get done, and what they will need the products or services for. Jobs to be done theory can help researchers or companies discover new opportunities or discovering holes in the market if there is something missing. (Porumboiu, 2021) This could be for example discovering a set of manual jobs that could be automatized or creating a tool for a specific job that needs to be done with multiple sets of tools.

As the discussion is about business design and creative solutions for organizations. Porumboiu determines multiple different methods and tools that can be used to applying jobs to be done theory to practice. Some methods could include discovery driven planning, where new ideas are developed with a low-risk status. Another method is the Forces of Progress, where forces that will guide customers to old as well as new behavior are determined. Finally, a simpler tool, The Job map, where the steps to what your customer is trying to accomplish are determined. (Porumboiu, 2021)

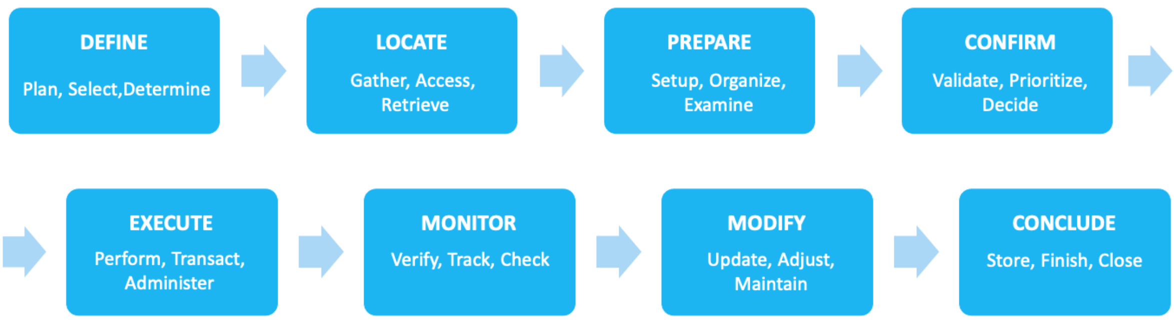

FIGURE 4. The Job map. (Porumboiu, 2021)

A job map is something that is easily mixed up with customer journey map, however, it does not include all the specific information of what happens after the product is finished and introduced to the market, that includes purchase process, usage and maintaining the product. A job map should be described as the ʻʼideal process flow”, which means that all the steps are made in the specific order so that the execution of the product or service will be successful. (Ulwick 2017c)

A good and functional job to be done is referred to jobs that a person or a customer has been trying to get done for years or even longer periods of time. Therefore, functional jobs remain stable over time. Therefore, there is a stable target that is trying to be achieved by organizations that offer products and services, however, it creates the challenge that the solution or offering to getting that job completed can be altered for better quality, price and purpose. (Ulwick 2017c) The focus in the solution will remain, but with the developments in technological change or overall design will change over time.

One of the pioneers behind jobs to be done theory, Tony Ulwick, has written about a Outcome-Driven Innovation (ODI) which is a process that is driven by strategy and innovation and helps companies develop great products. ODI was developed by Ulwicks company Strategyn and nowadays has hundreds of applications by different companies. Theory in itself presents that companies need to find and understand performance measures that customers have to getting a specific job done. This is done by using a 6-step process. (Ulwick 2017b)

FIGURE 5. The Outcome-Driven Innovation (ODI) Process. (Ulwick 2017a)

The aim of ODI is to use qualitative as well as quantitative research methods, to be able to reveal any hidden jobs that might give organizations an entry gap in the market. ODI process gives the researcher the information how organizations should create product and services that customers want to purchase as well how the products and services will succeed in the given market they are entering. (Ulwick 2017b)

Jobs to be done theory can be used to evaluate if a company or an organization shoul enter a new market area to enter. This could be done to finding out if certain areas do not have offerings of a certain product or there is a need for a specific service, that the market would benefit from. (Ulwick 2017c) For example, a certain market area could be missing a restaurant that is specialized in certain foods, that has been requested by the citizens living in the area. Or there might not be something similar, that could be somewhat popular in the area. A company could easily slide into the markets and bring in something that has been never done before.

An important thing to notice, is that most of the products in the market are not entirely done for completing a job. For example, a kettle boils water, but after the water has been boiled, there is another function that is needed for, that could be for example making tea. In that case, a kettle does not complete the whole job of making a cup of tea, since the only function it makes is to boil water. That makes the obstacle of that a specific job should not be too narrow, but also shouldn't be too broad, to avoid making the impossible happen. (Ulwick 2017c)

3 RESEARCH

The purpose of this thesis is to research and find the jobs to be done of personas working in financial management service centers. These personas include bookkeeper, invoicer and sales ledger, business controller, main user as well as purchase ledger. Including these jobs to be done, pains and gains of the specific jobs are defined to be able to use them for future development in Visma Publics operations. Personas provide a beneficial base for development, since new insights and missing jobs can be defined as well as the issues and goals regarding to getting a specific job done.

3.1 Research methods

Qualitative research includes collecting and analyzing data and information, that is non-numerical. Non-numerical information includes items such as, text, audio, experiences, motivations and opinions. It is opposite of quantitative research, which is concentrated on collecting data that is numerical. Qualitative research methods include observation, interview, focus groups, surveys as well as secondary research. Most of the methods have the possibility to gather data in conversation with questionnaires and discussion-based questions, as well as from existing data related to the subject. (Scribbr, 2020)

Qualitative research is based on people's experiences and perspectives, which cannot be measured. This way possible problems can be revealed as well as present more broad data, that can't be collected using quantitative measures. It is best to use qualitative data for research that includes behavioral patterns, discussions as well as understanding issues from personal perspective. (Oxford Academic, 2016.)

Research method used in this thesis is interviews, since the aim of this research is to collect data that includes opinions, experiences and other moving elements that are gathered from different people and the answers and viewpoints can differ between interviewed people. (Routio, 2007) Therefore, interviews give the opportunity to present additional questions depending on the answers given. As the questions are based around drafted personas, an open interview, where discussion around the questions and personas is almost recommendable, allows to dig deeper into behavioral issues and motivations of the people that are interviewed.

More specifically, the interviews conducted in this research are semi-structured, as there is a few prepared questions that are made to support the drafted personas, in case the interviewees need supporting as they are responding. Semi-structured are described as the combination of structured and unstructured interview styles, where there is some prepared questions but the interview is mainly based on the free-flowing conversation. The benefit of semi-structured interviews is that they have the possibility to look into topics that might arise during the interview situation. (Pollock)

As this thesis requires qualitative information, interviews are the most beneficial option to collect data and information. By interviewing, different attitudes and motivations as well as other behavioral patterns can be found in people. It is much more beneficial way of collecting data, since people are more willing to talk instead of writing, where multiple details can be left out. Interviews can adapt to different situations, which means that additional or follow-up questions can be presented to collect more specific answers. (Krishnaswami, O & Satyaprasad, B., 2010)

The interaction will be based on drafted personas and jobs to be done, which then leads to theme interview, where there can be any comments added that might seem relevant to the topic. Thematic interview is used when there is straightforward answer to the research question or a direct theory of how the research will go. Thematic interview then gives more room for different viewpoints around the subject, when there is no hypothesis. (Routio, 2007)

3.2 Research Implementation

In this part, the process creating the research questions and materials are described in a step-by-step process.

Firstly, the process of the research started by constructing the personas into drafts, that are presented in the appendix. These were constructed using online research about what kind of job descriptions were used in describing these specific jobs. After the personas were constructed into drafts, supporting questions were created to provide any assisting material to the semi-constructed interviews, in case the respondents were not able to add anything to the existing persona profiles.

After the personas and the questions were prepared and ready, the profiles were sent out beforehand to the respondents, to have time to view them and prepare their answers to if there was anything missing or if there was anything to add, or any differences in their company.

The first interviews were conducted together with Visma Public, where employees of Visma introduced their jobs to be done in a financial management internship format. The interviews were held together with invoicer who also performed job of sales ledger as well business controller and thirdly, financial controller and team leader. These interviews took place in a Google Meeting, where for example, person that was doing the jobs of invoicer and sales ledger showed how the job is performed, which parts of the software is used and how. Within request, they were able to perform these internships in a format, that served the purpose of this thesis. This then made it possible to question what was working in their jobs and which parts, they had difficulties in.

The second round of interviews were done with Company X, which is a service center that has multiple locations around Finland and is owned and founded by municipalities and hospital districts. They are in-house based which means that their owners are also their customers. This research interviews were based in the location in North-Savo. In Company X, interviews were done together with two service managers that operate in the financial management department.

Counting in total there were 5 people that responded to the interviews. After the interviews, a large number of notes that was then translated from Finnish to English, and then information was gathered into the persona profiles. The persona profiles were then shaped and formatted in PowerPoint, as well as pictures from Bing picture bank were added to remain the formatting of the usual persona profiles.

3.3 Methods for analysis

The method used to analyze this research is qualitative research, which concentrates on understanding the quality of the research and the meanings of the topic. Qualitative research is used to gain deep understanding of the issue, by using smaller samples in interviews to gather data from behavioural patterns to motivations and pain points. Qualitative research is widely used in UX design methodology as well as user research, which is deeply connected to this thesis research. (The Interaction Design Foundation: What is Qualitative Research?)

After qualitative research, data collected can be more difficult to evaluate since there are no numerical and straight answers given to evaluate. Since semi-structured interviews are used, where there is a free-flowing conversation that is based around a prepared script, answers can be varied and include opinions and attitudes. Which then leads to that data needs to be gathered in a sense that there can be similar patterns found inside larger groups of people. (The Interaction Design Foundation: What is Qualitative Research?)

After the qualitative research has been finished, thematic analysis is conducted. Thematic analysis means that from the collected data, the most relevant issues to the research topic are gathered. This way, different behavioural patterns can be identified from the gathered data. Thematic analysis provides a flexible methodical base for this thesis, since it allows finding the relevant answers to this research as well as provides possibility for more explorative answers. (The Interaction Design Foundation: How to Do a Thematic Analysis of User Interviews.) In this thesis the themes are presented as the job titles, and the answers will be handled under those themes.

Thematic analysis is created to study deeper into qualitative data, especially more into opinions and experiences of people. It is a flexible analyzing method, that will work great in this research as the focus is to find similar patterns of behavior. Thematic analysis does not only gather and summarize the collected data, but rather digs deeper and finds the meanings and generates themes around the subject. (Paperpile)

3.4 Who have been Interviewed

The first round of interviews was conducted amongst Visma Public Oy own financial management team. This allowed to gather more deep information with motivations, pains and gains to the drafted personas. It also made possible to find jobs to be done that are not described on the internet, or that are more specific to certain job descriptions instead of being vague.

The research was conducted with Company X, which is an in-house based service center, that is owned by municipalities. Company X produces financial and human resource management services as well as other supporting services, for example analyzing and consulting. Company X has locations around Finland, however in this research, interviews were done with experts from North-Savo location.

4 RESULTS

4.1 Findings & Discussion on Material

Bookkeeper

Starting with bookkeeper's role. Company X respondents stated that most of the jobs to be done were fairly similar to the drafted profile, this could be since there is a law behind bookkeeping that requires certain operations to be done. The biggest difference to Visma Public's own financial operations was that Company X has separate person performing payment transactions. Which lead to erasing the job of processing of banking materials and targeting outgoing and incoming transactions. Company X's respondents were positive that in some point in future, this could be part of the jobs.

Company X's respondents confirmed that a lot of supporting operations towards customer are part of their jobs to be done. They added running jobs, which included creating official statements to authorities correctly and on time, reconciliation of monthly accounts, creating financial statements and reporting from the state that is required either from Finnish law or EU laws.

Company X's respondents also stated that one of important jobs that bookkeeper needs to do, is to familiarize to the customer. It is also important to keep in touch with the existing customers, to be able to keep and create customer relations. Company X's respondents added to the bookkeepers gains that customers role creates differences on how the communication and co-operation is functioning. If their customer is open to development and co-operative, it made it easier to create suggestions and the customers gave more responsibility. However, if the customer had more strong knowledge in the field of financial issues, the communication is more limited and detailed into certain parts of the job. However, Company X's respondents felt that there was more responsibility of performing the job correctly, when the customer did not have any knowledge in financial matters.

Company X's respondents felt that since most of their operations are running in different software's, the completing their jobs to be done required that software's are running smoothly and efficiently. On rare occasions, Company X had to create bookkeeping materials by hand with for example excel, which made performing their job slower and grew their job load.

Invoicer and Sales ledger

Invoicer and Sales ledger role has been also merged together in Company X, which made it easier to perform research. As there was no need to separate these roles. Company X's respondents agreed to the jobs to be done were similar to the pre-drafted roles and did not have anything to add or to remove.

To gains, Company X's respondents added that developments in automatization contributes to performing the jobs. Company X still had some invoices that required them to be done manually by hand. Company X had multiple persons doing invoicing and sales ledging in different software's, which meant that when someone was absent, there was no one that was able to take over and perform their jobs meanwhile. They were hoping that sharing the knowhow inside the team would become a permanent factor of working inside the team.

The problems they brought to the table, often came from the customer's side. There were customers that were unsure of what to add to the software which meant that supervision was needed to ensure the collection of information and data. The errors in data require fixing and contacting the customers, which then adds extra work.

Company X also had employees that came to the company joined with the customer. This meant that customer service run smoothly, since they had already worked with them for several years. This however made it difficult to anyone else to contribute to those positions, as well as take over when someone from that team is absent.

Business Controller

Similarly, to Visma Public, Company X did not have an employee working under the title of ''business controller'', this was however replaced with an employee with similar jobs but different title, Financial Manager. Company X confirmed that the jobs to be done that were pre-drafted, were similar to their financial managers role.

Company X's respondents stated that financial manager had the biggest responsibility in maintaining accounting periods, in these periods it is important that each subject is in their correct periods which then showed the differences between yearly reports.

Financial managers role in Company X was differentiated from bookkeepers' role, in a way that financial managers / controller's job, is more about forecasting the future, rather than looking back which is related to more on bookkeepers' role. Financial manager is responsible of looking forward to seeing what the economy will look like for example in a couple of months.

Company X's respondents added that financial manager needs to create financial budget, which includes information on how much the company has gained, how much is the company predicted to gain in the next year and if the operating of the company is profitable. Financial manager has the perspective of the figures, and how they will look like in the future operations.

Company X's respondents stated that financial managers role includes lots of analyzing operations and numbers, and acts like a ''gatekeeper'' for the company's money vault.

Company X's respondents were positive that without a good team behind financial manager, numbers cannot be attained and therefore there is nothing to be analyzed. This then goes into shared responsibilities, where financial manager creates framework for the company's economy, but the units inside the company manage their own shares that contribute to the company.

Auditor

In Company X, also had audition done from outside of the company. They did not do audit as part of their operations. Therefore, auditor has been removed from being one of the persona profiles, since there is not relevant data that could have been gathered during the research process.

Main User

Inside Company X where multiple operations and levels, which meant that there was multiple Main Users inside to company, that might have had differences in their jobs to be done. However, in this case, main user was from the financial department's perspective.

In Company X, Main User is the one person that takes care of maintenance-related user management, rules and restrictions as well as automation of purchase invoice systems. This meant maintenance of references and transmissions of invoices. If there were any matters related to the operation of the software's or programs used, main users are the ones contacting systems manufacturers. Main users in Company X are responsible for creating accounting templates.

As the main users in Company X were the first-hand contact to the system manufacturers, they provide systems deployment process as well as training to the software. Company X's respondents mentioned that they have monthly meetings, where main users can review error situations in the systems as well as share their gained know-how.

Company X's respondents emphasized that main user does a lot of customer support and does a lot of ''spiritual support'' towards the clients.

Company X's respondents added that co-operation with the system producer needs to be functionable, to be able to perform their jobs to be done and making sure there is no surprises in the system at deployment. This also meant that main users are responsible in familiarizing other personnel in the company with the system and its functions, so that information is not left behind one person. Co-operation inside the company is therefore needed, since then main user can ensure that information is moving to the right directions.

As pains in main users' role, Company X's respondents added strange accounting methods from the customer's side. For example, some customers had very specific requirements which then lead to creating add-ons to the system and made extra work in verifying their operation.

Purchase Ledger

There was a huge amount of information that was needed for purchase ledger's role, since there was quite a small amount of information to research from.

In Company X, purchase ledger is in charge of invoice routing, where from the purchase invoice system, according to customer instructions, invoices are routed to the right party. As an additional service, Company X, has posting operations for some customers. Company X's purchase ledger does review of purchase ledger, set offs between credit and debit invoices, if they match.

Other jobs to be done Company X’s purchase ledger does include emails with customers, invoice settlements as well as looking into payment dates, maintenance of supplier information and monitoring of the recovery register.

Purchase ledger in Company X is responsible of maintaining route models, that is based on how they find their paths to the right people. One of most important everyday jobs is payment, where exports of invoices for payment are sent and cleared as paid within the system.

Company X’s respondents stated that one of the most important gains is when the cooperation with the customer works, then purchase ledger can receive all the necessary information needed to perform their tasks, for example that whom the bills are sent and that invoices hold the correct information, including references.

Purchase ledger in Company X needs a functionable and up to date systems and software’s, as well as automatization to releasing time from simple tasks. Company X’s respondents stated that in purchase ledger’s role, there is a lot of manual labor that needs to be done.

Company X’s respondents confirmed that a lot of purchase ledgers jobs are affected from other parties, for example, waiting for accounting with error lists so that they can process payment.

However, sometimes the pain for not being able to perform their job can come from the customers side, which then brought up an idea of that if customers had an entry way to the software, where they could maintain user data or routes, which would release a lot of time from that part of the job. Company X’s purchase ledgers did not also receive information if a client retired, which meant that invoices would be sent to wrong customers and lead to payment reminders and due dates.

5 DEVELOPED PERSONAS

In this chapter, based on the results of the research conducted, finished personas of bookkeeper, invoicer and sales ledger, business controller, main user as well as purchase ledger are presented in a picture format as described previously. The profiles are created using the materials gathered in the interviews, according to respondents' viewpoints and answers.

5.1 Bookkeeper Persona

Firstly, presented the persona of a bookkeeper, where the main jobs to be done are described, and followed by the gains and pains related to getting those jobs done. As the role of a bookkeeper is rather similar in most companies, the operations done require similar activities and are regulated by different laws, the jobs seemed quite clear and straightforward.

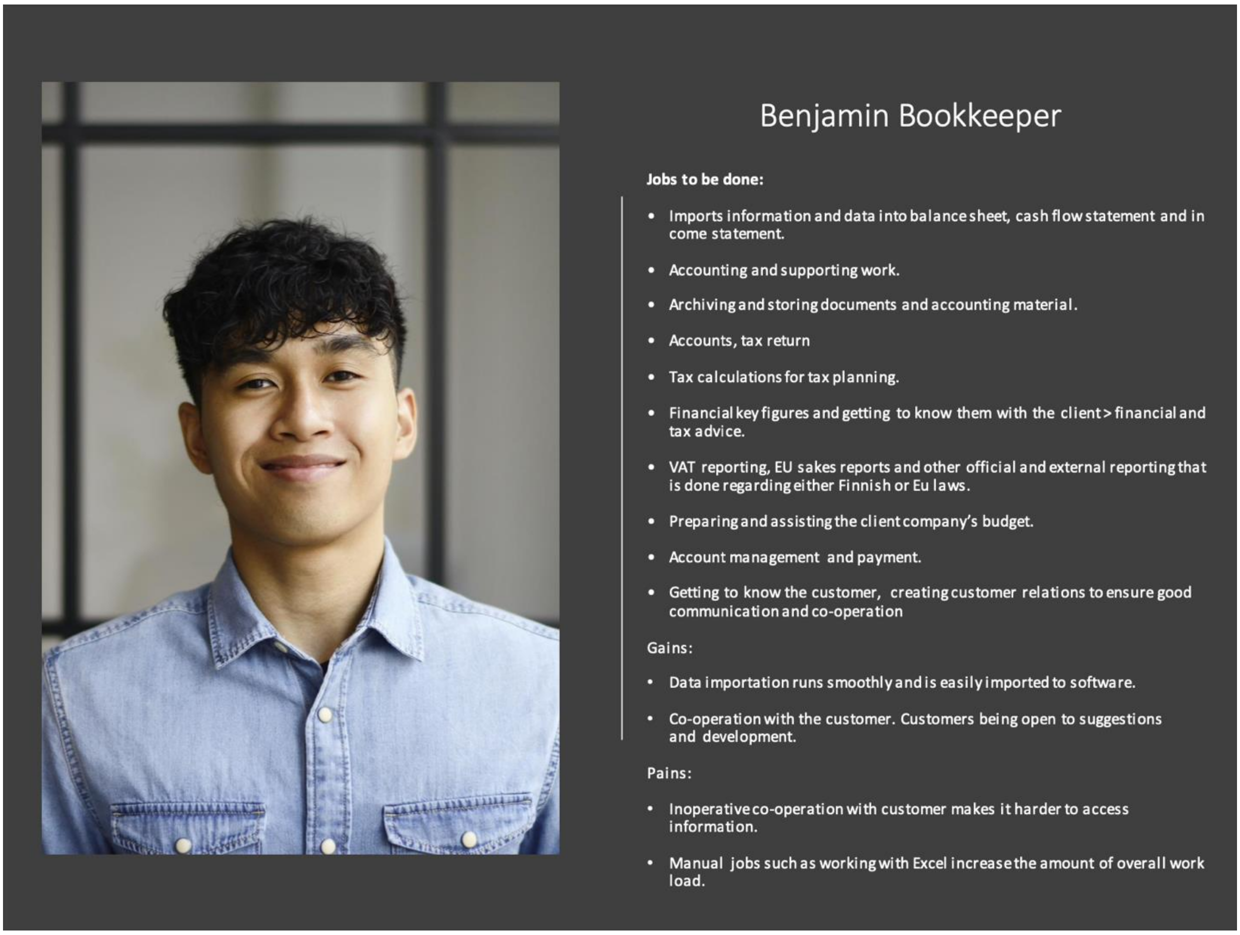

FIGURE 6. Bookkeeper- user persona.

5.2 Invoicer & Sales Ledger Persona

Secondly, presenting the persona of the invoicer and sales ledger. The persona was more concentrated in the invoicers role; however, the job of sales ledger came as a side function that seemed to be similar in the two companies that respondents were from. Inside this role was discovered quite a few pains and gains related to the job.

FIGURE 7. Invoicer & Sales Ledger- user persona.

5.3 Business Controller Persona

Business Controller was more looked as the persona of a Financial Manager, which could be since the title of business controller is still rather new term. Business Controller's jobs were mostly connected to reporting as well as looking forward in the future, concentrating on budgeting as well as what kind of forecasts there were predicted for the next few months for the company.

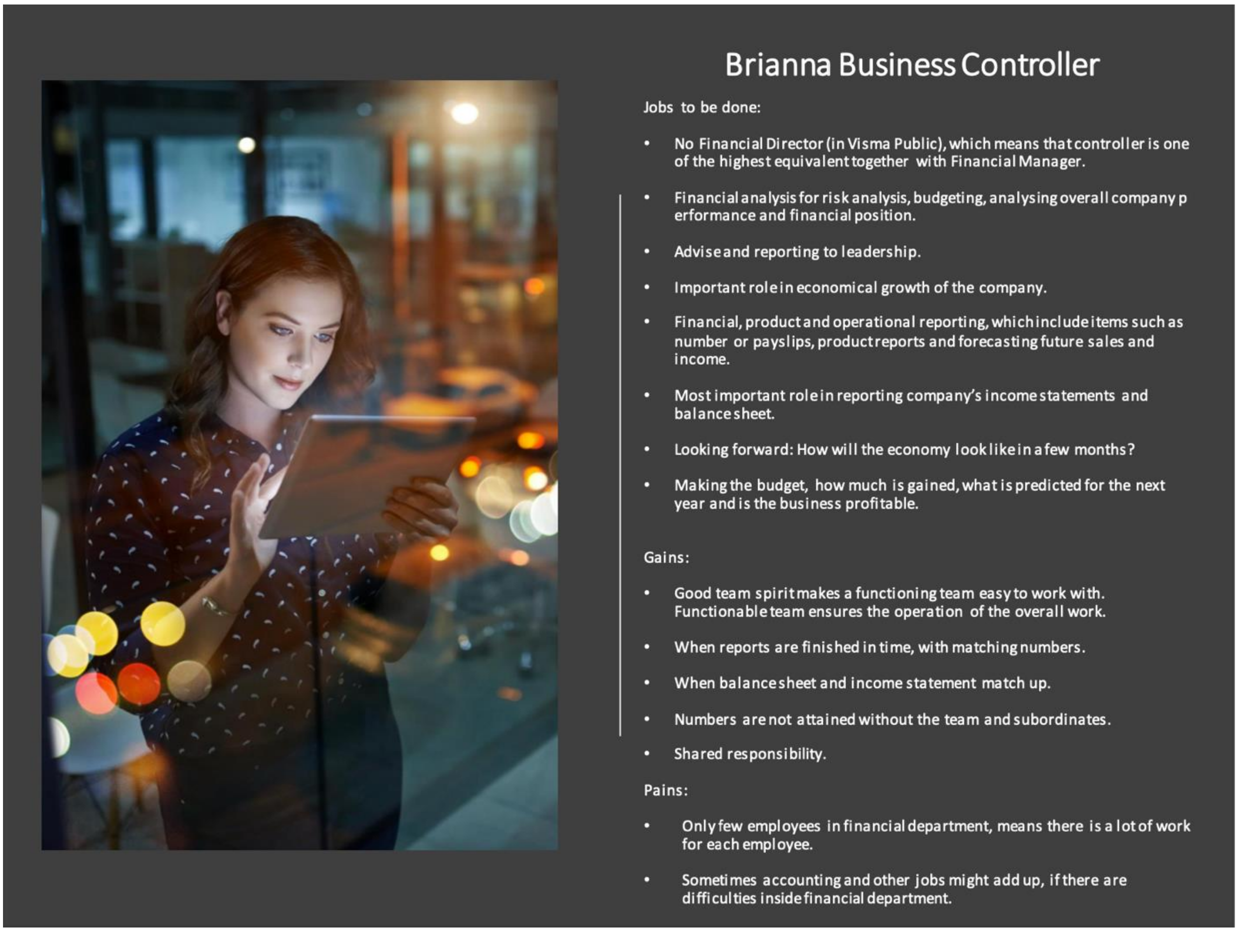

FIGURE 8. Business Controller- user persona.

5.4 Main User Persona

Main User was the persona that required the most effort, since there was only little material to research from since the role can vary in each company. Mainly, the responses to this role came from Company X, which is what Visma Public originally wished for. The core jobs were found and created a clear structure to the persona. The pains and gains of the persona were mostly connected to the system producer, since Main User is the first-had connection that direction.

FIGURE 9. Main User- user persona.

5.5 Purchase Ledger Persona

Finally, the persona of Purchase Ledger. This persona required the most amount of research. Gratefully, Company X had again a clear core of the jobs connected to this specific role. The main objects of the job were described around payment transactions. This created pains and gains that included requiring information from the customer as well as were tightly connected to the co-operation with the customers.

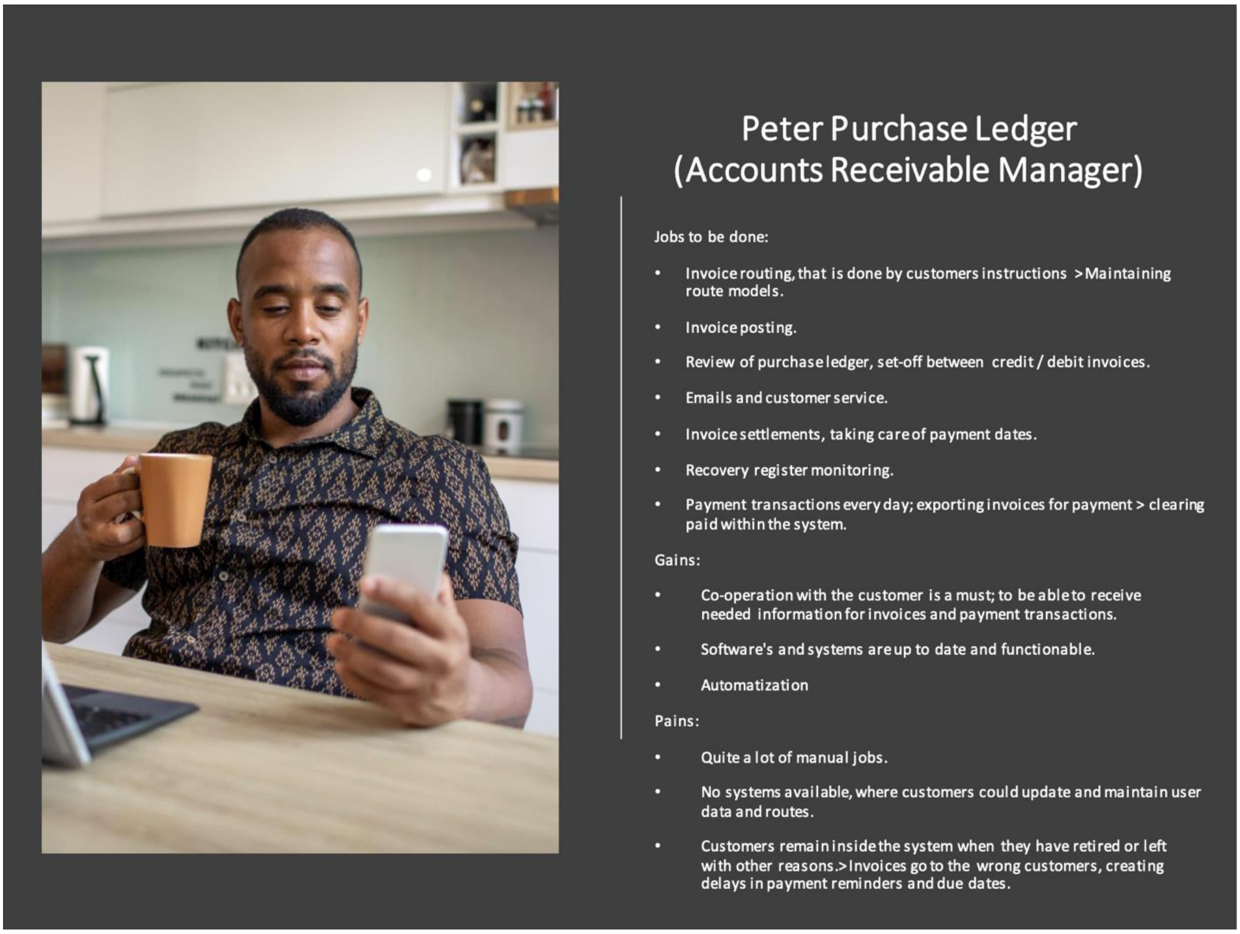

FIGURE 10. Purchase Ledger- user persona.

6 DISCUSSION

The aim of this thesis was to create user personas in shared service centers as well as their jobs to be done. The differences and views in business to business, and how personas are used in B2B context are discussed and evaluated. The research was conducted using qualitative research by interviewing people working in service centers. The interviews were based around the drafted personas that were created with research. Creating the drafted personas was somewhat demanding, since there was a lot of information available from multiple resources, however there were quite a lot of similarities as well as most of the job descriptions did not have much deep information of what their jobs to be done were inside the company. This could be, since there are differences with which systems and software's they are using and what kind of organization was in question. There was also a lot of information that was unavailable to search, there was quite broad job descriptions as well as information was missing since for example purchase and sales ledger were quite often attached with another job title.

Any similar researches that used or evaluated business to business personas were not discovered during research. Most of the information and research materials available used the business to customer models. It is possible, that organizations could be conducting similar researches, but instead of public materials, those are meant only for in-house uses. This research could have also been performed in completely another fields, where the information would not correlate similarly to this research but could start similar discussions as well as create personas in similar ways.

Therefore, the theory part was somewhat the most difficult. It demanded a lot of research and was therefore highly time consuming, since there was a large amount of different materials and resources to go through and evaluate. One of the most demanding parts was to find out websites and other sources that did not contain the same information as the others, as well as mapping out which online sources would be reliable enough to use as a reference in a thesis.

The personas that were found during the research were similar between the Visma Public’s own financial department as well as service centers, which was expected as many of the roles include jobs to be done that are done regarding different EU and Finnish laws that are regulating financial operations. The data that is handled inside these jobs are fairly similar and usually handle similar issues, regarding individuals or organizations finances and accounting.

The method of creating a buyer persona was a familiar process, since there has been courses regarding business design that work with the different ways to finding creative paths to improve customer-oriented businesses and services. However, creating a persona is an ongoing process since there is constant change in the different fields of business, that organizations need to be able to form to.

The interview part of this thesis was very successful, interviews were easily arranged, and the interviewees were interested in taking part on the research. The conversations flowed smoothly going through each persona profile, even though the drafted personas were in English, the interviewees were able to understand and identify persona profiles and their jobs-to-be-done quicky. When the jobs to be done were gone through first, it made it possible to present any different scenarios that could help them find the different pains and gains related to those jobs.

As a result, the finalized personas should work great as the intention they were made for and are easily developed further to suit the needs of Visma Public Oy the best ways possible. A lot of useful information was found, a large amount of personal knowledge in the business field was developed and it made it possible to use and solidify information learned during the years of studying.

In the future, the personas could be further developed by interviewing other service centers in the field and gain more understanding about their operations and how those might differ from the ones that were introduced in this thesis. Somewhat beneficial could be observing the actual workdays or even weeks of the personas presented, which could present problematic situations as well as different manual jobs that could be automatized in the future.

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APPENDIX 1: INTERVIEW MATERIALS

The drafted personas that were sent out to the respondents before the interviews:

1) Bookkeeper-draft

Benjamin Bookkeeper

Jobs to be done:

- Imports information and data into balance sheet, cash flow statement and income state ment.
- Accounting and supporting work.
- Archiving and storing documents and accounting material.
- Accounts, tax return
- Tax calculations for tax planning.
- Financial key figures and getting to know them with the client > financial and tax advice.
- VAT reporting, EU sakes reports and other external reporting.
- Preparing and assisting the client company's budget.
- Account management and payment.
- Processing of banking materials and targeting outgoing and incoming transactions.

Gains:

- Data importation run smoothly and is easily imported

Pains:

2) Invoicer & Sales Ledger - draft

Isabella Invoicer (& Sales Ledger)

Jobs to be done:

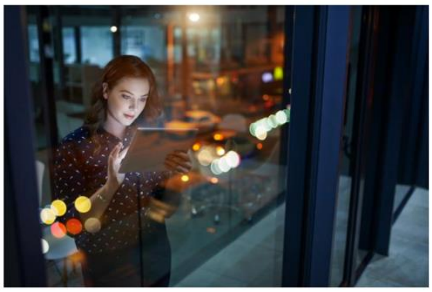
- Creating invoices, contract invoices.
- Customer records, database. Invoicer takes care that cur rent payments and documents are relevant.
- References from banking system.
- Data file descriptions.
- Takes care of emails in the financial department, since most of them are related to invoices.
- Support for accounting, bookkeeping and other employ ees in financial department.
- Accounts receivable, includes all sent out invoices, accounts receivable and sales information from banking system. Invoicer takes mostly care of these, since he/she is in charge of invoicing.

Gains:

- If everyone does their part with Work Orders (seller > consultant > invoicing), the parts are imported correct, filling work orders manually will run smooth and fast.
- Most of the invoices and database is automized, which makes creating invoices run smoothly and error free.

- Pains:
- Work orders need to be filled manually. (Automatization taking place in August, which should make things run smoother.)
- Some system features could run smoother.

3) Business Controller -draft



Brianna Business Controller

Jobs to be done:

- No Financial Director (in Visma Public), which means that controller is one of the highest equivalent together with Financial Manager.
- Financial analysis for risk analysis, budgeting, an alysing overall company performance and finan cial position.
- Advise and reporting to leadership.
- Important role in economical growth of the com pany.
- Financial, product and operational reporting, which include items such as number or payslips, product reports and forecasting future sales and income.
- Most important role in reporting company's income statements and balance sheet.

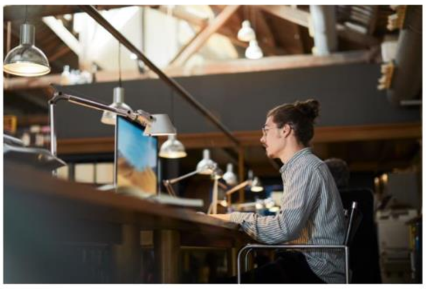
Gains:

- Good team spirit makes a functioning team easy to work with.
- When reports are finished in time, with matching numbers.
- When balance sheet and income statement match up.

Pains:

- Only few employees in financial department, means there is a lot of work for each employee.
- Sometimes accounting and other jobs might add up, if there are difficulties inside financial department.

4) Auditor- draft, that was later removed from the profiles, since there it was not identified as one in the interviews.



Andrew Auditor

- Jobs to be done:
- Visma Public > they have a third party from external company performing audit, however, they try to perform their own audit during their own jobs to be done.
- Performs audit, which means tracking financ ial records from beginning to end.
- Checking that everything is performed in go od accounting principles and checks that tax laws are followed.
- Protects company from fraud.
- Audit trail inspection.
- Verification of supporting material.
- Customer guidance and problem solving.

Gains:

- Financial records are easily available and data is clearly sorted.

Pains:

5) Main User-draft

Matthew Main User

Jobs to be done:

- In bookkeeping this person could be financial controller
- License and account administration
- Deployment with sub-customers
- Settings
- Primary customer advice and progra m support
- Operative work, automatization of transporting data
- Opening and closing accounting period.

Gains:

Pains:

6) Purchase Ledger-draft

Peter Purchase Ledger

Jobs to be done:

- Purchase ledger is a part of bookkeeping.
- Purchase invoices from purchased go ods for the company.

Gains:

Pains:

APPENDIX 2: INTERVIEW QUESTIONS

Supporting questions in the interviews:

1. What kind of persons are working in your team? What roles do they have?

   The first question was used to map out whether they had similarities together with Visma, as well as to see how the structure of their team was built, it was used to start the conversatio

2. Do the roles have tasks, that are missing from here? Or are there tasks, that are not part of that specific role?

   The second question was used to see the similarities of the roles together with Visma, as well as to start the conversation of what tasks or jobs the roles had.

3. What kind of gains and pains would you describe to this role? What helps getting a specific task done? What does not work and can be seen as a pain to a task?

   The third questions was used to start the thinking process of what kind of issues or gains the tasks in that specific personas profile can help or make more difficult to getting that job done.

4. Are there roles missing in your opinion? If there is, what is their role and what do they do?

   The fourth question was used to see if there was something that was not described, if there was a specific persona missing.

5. Is there anything I should have asked you, that I did not already? Is there something you would add that seems relevant to the topic?

   The final question was used in the end of the conversation and the whole interview, and was used to see if there was anything that rose to the respondents minds after the interview, that they thought was beneficial for this research.