A background image of puzzle pieces in various shades of grey and blue, scattered across a light-colored surface. The pieces are arranged in a way that suggests a larger picture being assembled.

From Fragmented Insights to Company-Wide Strategy: A Case Study

How I Led Foundational Research That Reshaped Paylocity's Platform

Building a Foundation for Product Strategy at Paylocity

About Paylocity

A workforce management platform that supports employees, managers, and HR teams across a wide range of industries

The Initiative

Paylocity Next: A company-wide effort to reimagine the platform experience and define its future direction

The Challenge

No shared understanding of users to guide product decisions across a complex, multi-role ecosystem

This work would influence how every user interacts with the platform

The Real Problem Wasn't Features

It Was Understanding



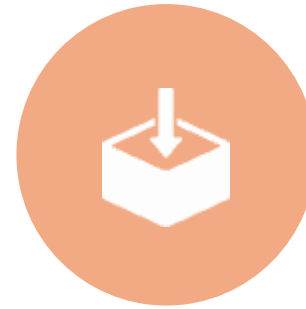
Fragmented Research

No centralized research function or shared user model



Undefined Guidance

No archetypes guiding product decisions



Operational Silos

Teams operating independently, hindering collaboration



Feature-Driven Development

Product decisions driven by feature parity, not user needs

Result: Disjointed experiences, inefficiencies, and growing user frustration

Why This Mattered



System-Wide Impact

Affected every product surface
and user experience



No Shared Decision Framework

Teams made conflicting product
choices without a common
foundation



Adoption & Retention Risk

Inconsistent experiences reduced
trust and long-term engagement



Constrained Product Vision

Lack of clarity made it difficult to
define a cohesive long-term
direction

Core Question: How do we design a platform that works for different users with different goals?

Without this foundation, product decisions lacked consistency and direction.

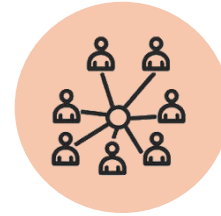
My Role



Strategy

Set the research strategy

- Define end-to-end research approach across discovery and evaluation
- Align research priorities with product and design leadership
- Focus teams on the highest impact questions



Influence

Lead through influence and partnership

- Guide and coach researchers across multiple workstreams
- Build strong partnerships with Product, Design, and stakeholders
- Ensure the voice of the customer is present in key decisions



Scale Impact

Turn insights into scalable outcomes

- Translate insights into clear Product direction
- Create reusable frameworks to scale research impact
- Drive decisions that influence product and business outcomes

My role was to create clarity — defining the problem, aligning teams, and guiding decisions.

Build the Foundation -> Then Shape the Future



Phase 1: Understand the Ecosystem

Review internal data, gather stakeholder input, conduct competitive analyses, and evaluate existing signals



Phase 2: Define User Reality

Research and document roles, needs, behaviors, and environments



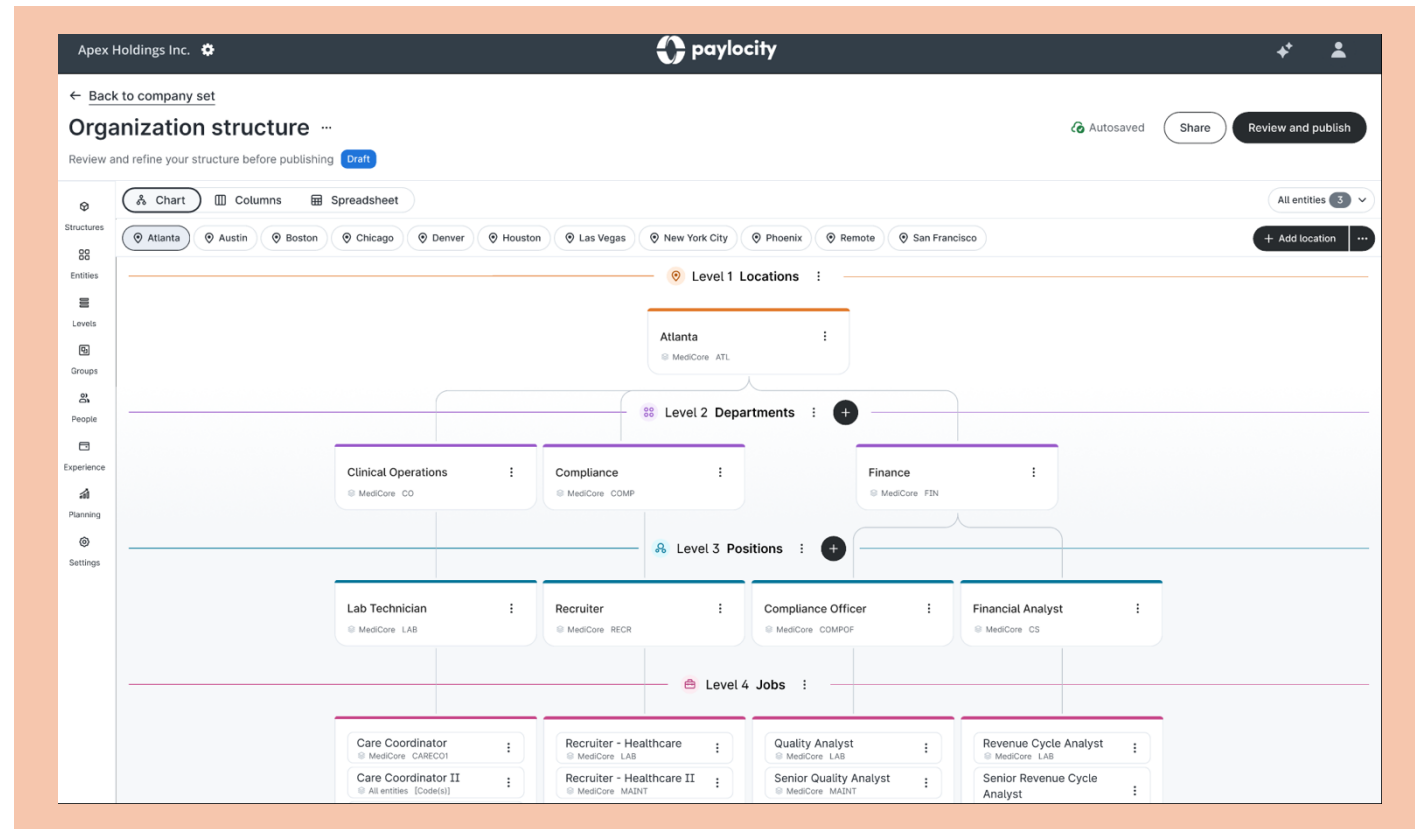
Phase 3: Make It Tangible

Prototype-driven research to explore structure and experience

I structured this approach to reduce the highest-risk unknowns first and to guide product direction quickly.

Methods

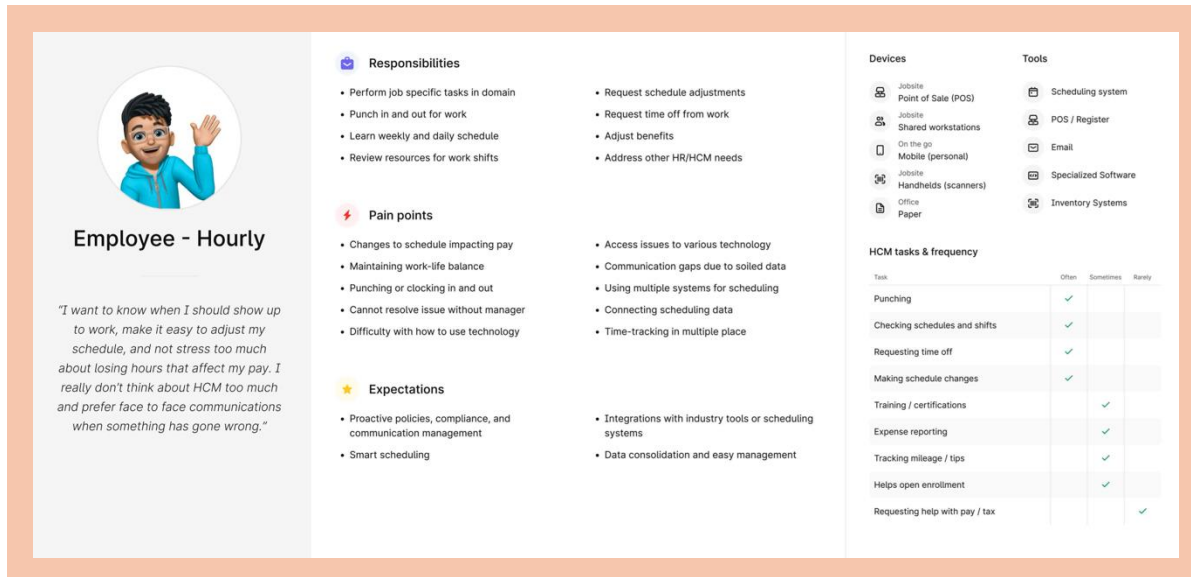
- Interviews across multiple user roles and industries
- Prototype-based usability and concept testing (three iterative rounds over six months)
- In practice, this meant conducting 1:1 task-based interviews with employees, managers, and HR admins from different industries and verticals, using interactive prototypes to observe real workflows and decision-making



I designed this approach to balance depth and speed- so we could reduce ambiguity quickly enough to influence active product decisions.

Archetype Creation

Turned Insights into Product Direction



Employee - Hourly

"I want to know when I should show up to work, make it easy to adjust my schedule, and not stress too much about losing hours that affect my pay. I really don't think about HCM too much and prefer face to face communications when something has gone wrong."

Responsibilities

- Perform job specific tasks in domain
- Punch in and out for work
- Learn weekly and daily schedule
- Review resources for work shifts
- Request schedule adjustments
- Request time off from work
- Adjust benefits
- Address other HR/HCM needs

Pain points

- Changes to schedule impacting pay
- Maintaining work-life balance
- Punching or clocking in and out
- Cannot resolve issue without manager
- Difficulty with how to use technology
- Access issues to various technology
- Communication gaps due to soiled data
- Using multiple systems for scheduling
- Connecting scheduling data
- Time-tracking in multiple place

Expectations

- Proactive policies, compliance, and communication management
- Smart scheduling
- Integrations with industry tools or scheduling systems
- Data consolidation and easy management

Devices

- Jobsite Point of Sale (POS)
- Jobsite Shared workstations
- On the go Mobile (personal)
- Jobsite Handhelds (scanners)
- Office Paper

Tools

- Scheduling system
- POS / Register
- Email
- Specialized Software
- Inventory Systems

HCM tasks & frequency

Task	Often	Sometimes	Rarely
Punching	✓		
Checking schedules and shifts	✓		
Requesting time off	✓		
Making schedule changes	✓		
Training / certifications		✓	
Expense reporting		✓	
Tracking mileage / tips		✓	
Helps open enrollment		✓	
Requesting help with pay / tax			✓

- Defined 5 role-based archetypes grounded in real behaviors (example shown here)
- Captured distinct goals across employees, managers, and HR admins
- Shifted teams from feature thinking to user-centered decision making
- Created a shared language across Product, Design, and Sales
- Developed a framework and guidance for teams to create archetypes within their domains, enabling a scalable, organization-wide understanding of users
 - This was important to me — I wanted archetypes to become a part of how the organization thinks, rather than just living in one project.

Outcome: Teams could now design and prioritize with a clear understanding of who they were building for.

Scaling Research Impact

From Insight to System

Foundational Archetypes

Created foundational archetypes adopted across multiple teams

Archetype Creation Templates

Built templates for continued archetype creation

Researcher Coaching

Coached researchers to apply frameworks across diverse domains

Cross-Functional Alignment

Enabled Product, Design, and Sales alignment

Turned a one-time project into a repeatable system used across teams

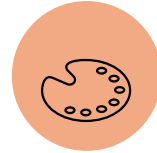
Cross-Functional Collaboration and Impact

Research Embedded in Decision-Making



Product Partnership

Partnered early with Product to shape roadmap direction



Design Collaboration

Collaborated with Design on iterative solutions



Data Science Validation

Worked with data science to validate patterns



Customer Advocacy

Represented the voice of the customer in leadership discussions



Executive Communication

Presented findings to executive leadership and board

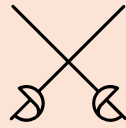
Created alignment across teams by bringing people together around shared data, understanding, and decisions

Navigating Challenges

Complexity, Tradeoffs, and Change Management



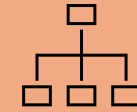
Multiple user
types with different
needs



Conflicting
roadmap priorities



Evolving
research
maturity across
teams



Need for concise,
executive-level
communication

Where I pushed the team was in long-term vision with immediate delivery needs.

Results Helped Shape the Future of the Platform



Evolved into
Paylocity Next
(company-wide platform)



Shifted to a role-
based experience
model



Influenced design
system and
information
architecture



Created alignment at
executive and
organizational levels

This work didn't just inform features — it reshaped how the platform was designed and how teams made decisions.