

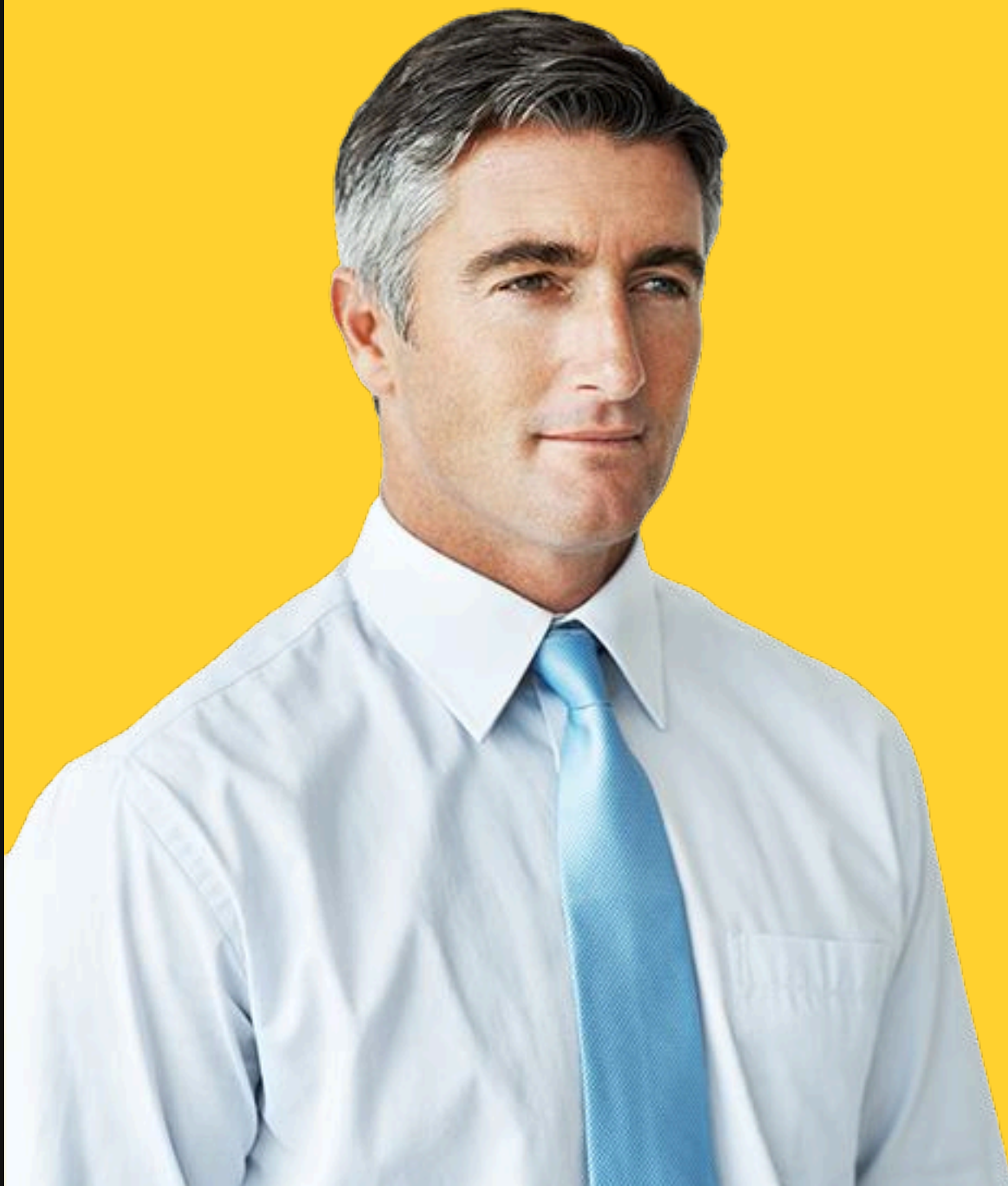
# Chris

## Admin

TECH-CONFIDENT

SYSTEM-ORIENTED

PROCESS-DRIVEN



## About

Chris is responsible for configuring and maintaining SPOTIO across the entire sales organization. While not customer-facing, his role is critical—he ensures the system structure, user roles, sales models, and company documents are always up to date and aligned with the business. Chris works closely with sales leadership to customize the platform to their workflows and ensure compliance.

He's detail-oriented and values stability, clean data, and scalability. When new features like AI chat or summarization roll out, Chris is the first to explore how they can be customized for company use. He's often juggling user management, integrations, and documentation while troubleshooting support requests.

## Daily / Weekly Activities

- Configure territories, teams, and user roles
- Add/remove users and adjust permissions
- Upload and manage Company Docs
- Clean and structure lead data
- Oversee CRM and integration syncs
- Monitor app usage and feature adoption
- Review admin dashboards and audit logs
- Coordinate onboarding and training logistics
- Enable/disable features like AI Summarization and Chat Assistant

## Goals

- Maintain a clean and scalable platform structure
- Ensure the right users have the right access
- Simplify onboarding for reps and managers
- Customize the AI Assistant with company-specific knowledge
- Keep data synced between SPOTIO and connected platforms

## Pains

- Constant updates needed for user and role changes
- Reps failing to follow setup workflows or naming conventions
- Training needs vary widely between teams
- Data entered in-field is often incomplete or inconsistent