

CIRRUS PAYROLL



VIVID VISION 2027



OVERVIEW

The following is our Vivid Vision, a blueprint for the future of the company. This vision brings the future into the present, providing us with a crystal-clear understanding of where we are headed.

This clarity empowers us to make better decisions in the present, ensuring that every action we take is strategic and aligned with the reality we are seeking to create.

“Where there is no vision, the people perish.” - Proverbs 29:18

SNAPSHOT

It's June 30, 2027, and we are wrapping up another exciting year of sensational growth. We are pursuing our mission, staying true to our values, and building a dynamic culture. We have really hit our stride. Cirrus is an exciting place to be!



MISSION

Our mission is clear:

To help small businesses achieve their dreams and build a better future for their people, by being the world's most responsive and trusted payroll company.

Running a small business and managing a team has never been harder. Small businesses need a partner they can rely on, so they can keep moving toward their goals.

Our proven business model, focused on exceptional customer service, gives our clients the confidence they need to make their dreams a reality for themselves, their teams, and their communities.

CORE VALUES

Our core values aren't just words. We talk about them often and we live them out every day:

- ✓ **Begin With Gratitude**
- ✓ **Improve Every Day**
- ✓ **Wow With Responsiveness**
- ✓ **Keep It Upbeat**
- ✓ **Work As A Team**
- ✓ **Be Resourceful And Relentless**
- ✓ **Do The Right Thing**



DYNAMIC CULTURE

We believe that *Cirrus exists to become the best version of itself*, so that it can do the most good in the world. This can only happen as each team member strives to become the best version of themselves, by envisioning a better future, and working toward their goals.

This culture of growth has been embedded in the company through two cornerstone initiatives:

1. Vivid Vision. The Founder's vision affects the entire team! Everyone on the team deserves to know where we are headed. We talk about our mission and values regularly, and we formally update our Vivid Vision document every year. The vision is big and inspiring, and it will stretch us. And we believe that we will achieve it!

2. Dream Manager. We have a thriving Dream Manager program in place to help every team member reach their goals and dreams. This program has generated an incredible amount of energy, loyalty, and camaraderie amongst the team, as we support each other in becoming the best versions of ourselves.

Because of our shared mission, strong culture, and the good people that we hire, we are remarkably free from the politics and drama that plague so many businesses. When new hires come on, they feel a striking difference in our culture from the places they used to work. And because of our reputation in the industry, we have no problem finding amazing people to join our team and make our culture even better.



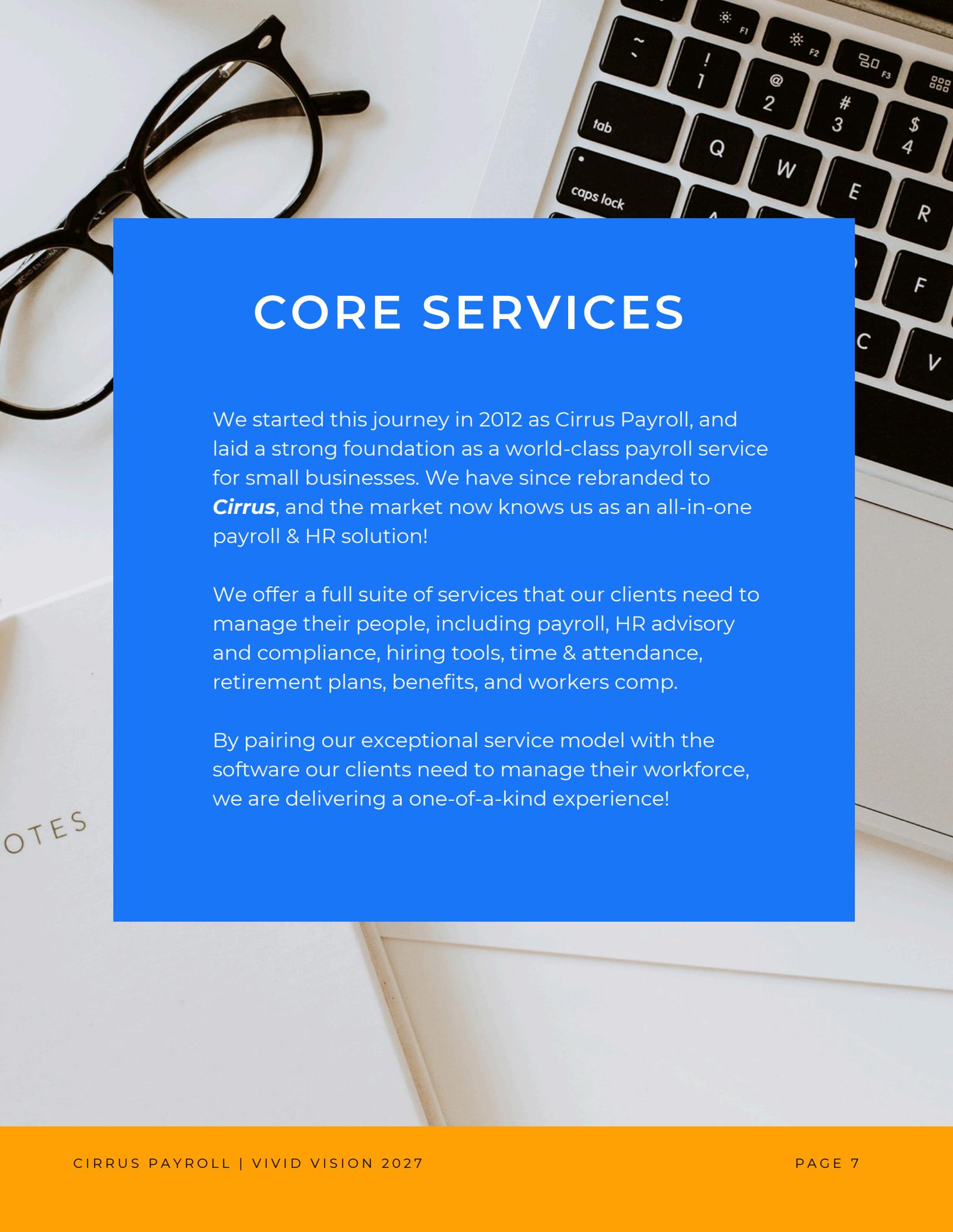
THE TEAM

- ✓ **As the Founder**, I am more passionate than ever about the company and our mission. I am focused on the vision and sharing it with our team, building our leaders, promoting the company, and building exciting partnerships that accelerate us toward our big goals.
- ✓ **Our Leadership Team** is fully aligned with our vision, and meets regularly to review our Strategic Plan and collaborate on its execution. The Leadership Team is composed of the CEO and department leaders, and is committed to empowering the entire team to reach its full potential.
- ✓ **Our Payroll Team** provides exceptional service to our clients with industry-leading response times and an upbeat attitude. Our clients love working with this team, and consistently rave about the levels of service they receive.
- ✓ **Our Implementation Team** is filled with payroll and project management experts, who consistently keep all implementation projects on track. They have created an efficient and nimble system for bringing on large volumes of new clients. Other payroll companies cannot understand how we are able to onboard the number of clients that we do!
- ✓ **Our Tax Team** is deeply knowledgeable about payroll compliance, and they have built an incredible system for managing all aspects of the work. From registrations to filings, deposits, amendments, and notice resolution, everything is handled efficiently and promptly. Nothing falls through the cracks, and the team relentlessly attacks every challenge that arises.
- ✓ **Our Marketing Team** is creating high demand for our services by consistently educating the market on how Cirrus uniquely partners with small businesses. With a clear strategy for lead generation, our pipeline just keeps growing!

- ✓ **Our Sales Team** actively engages in outbound prospecting and conducts demos for inbound leads. They continuously refine their skills and adopt the latest sales techniques, always maintaining honesty, transparency, and a genuine commitment to serving our clients. They consistently hit their targets and drive significant growth for the company.
- ✓ **Our Team of Assistants** helps each department run smoothly and efficiently. Through our program of hiring talented, resourceful, and hard-working Assistants, we have introduced many people to the payroll industry, some of whom have discovered a new passion and decided to pursue payroll as a career!

Regardless of department or role, we feel like **ONE TEAM**, working toward the same mission and goals!





CORE SERVICES

We started this journey in 2012 as Cirrus Payroll, and laid a strong foundation as a world-class payroll service for small businesses. We have since rebranded to **Cirrus**, and the market now knows us as an all-in-one payroll & HR solution!

We offer a full suite of services that our clients need to manage their people, including payroll, HR advisory and compliance, hiring tools, time & attendance, retirement plans, benefits, and workers comp.

By pairing our exceptional service model with the software our clients need to manage their workforce, we are delivering a one-of-a-kind experience!



SALES AND MARKETING

We have cemented our reputation in the market as **the most responsive payroll company on the planet®**, and our Sales and Marketing teams have capitalized on our client-centered model.

Our Marketing team has built a reliable system that generates a consistent flow of new clients into the company. They are targeting companies with 1-250 employees, with simple and clear service packages that deliver tremendous and irresistible value.

We have a beautiful website that ranks highly in search and gathers new quote requests every day. We have added hundreds of 5-star reviews on Google. Our newsletter and social media efforts are driving new business, and our referral program is securing new clients through word-of-mouth.

Our Sales Team closes deals at an exceptional rate, executing a consistent sales process that delivers results. We have added dozens of partnerships with Referring Accountants who are thrilled to be working with us. And we are regularly acquiring clients from other payroll and accounting firms.

Through the efforts of these amazing teams, MRR per client has increased to \$225, and our clients base now exceeds 2,000 clients. We have hit our big goal of exceeding \$5 million in annual revenue!

FINANCIALS

Cirrus remains privately-owned. We are serving over 2,000 clients and doing over \$5 million in annual revenue. Our MRR per client has increased by 50% in 3 years, as we have expanded our service offerings and taken on larger clients. Our finance team uses the Simple Numbers system to measure and optimize the financial health of the company. Company debt is limited to the financing of acquisitions and growth.

We have a minimum of 2 months operating expenses in the bank at all times as a cushion against unforeseen economic circumstances. Because of our wise stewarding of resources, everyone on the team feels secure and confident in the financial stability of the company.

SYSTEMS FOR SUCCESS

Our systems are better than ever. We have a thriving knowledge base, which includes playbooks and trainings for every department. Our payroll software has dramatically improved, and we are fully harnessing its power to serve our clients with great efficiency. The team faithfully executes our carefully designed systems, and continually looks to optimize even more.

We have clear goals we are shooting for as a team. Every team member has a “number” they are responsible for, which is tied to our Strategic Plan. If everyone is hitting their numbers, we will hit our goals and fulfill our mission!

Because of our carefully designed and continually updated systems, it's awe-inspiring the amount of work that our team flawlessly executes every day.



COMMUNITY INVOLVEMENT

Through our **Pay(roll) it Forward®** initiative, the company is making an impact beyond the business. For every paycheck we process, we make a small donation, that adds up to big giving!

Cirrus proudly sponsors the **Make-A-Wish Foundation**, directing a portion of these funds to support the dreams of children with critical illnesses. The remaining funds are allocated to our team, giving each member the chance to direct their portion to causes they're passionate about in their local communities!

In addition to giving financially, we are contributing to our communities through our *Cirrus Serves* program. **Cirrus Serve Days** are company-paid time-off which team members use to volunteer their time to charities in their local communities. The initiative has been a great success, and we love to share the stories of our team member's service and the impact they are having.

Through our company initiatives around giving and community involvement, we are making a meaningful impact in people's lives, building team spirit, and inspiring other companies to roll out their own initiatives! We feel immensely proud at the difference we are making.



FOUNDER FEELING



In 2024, we set out on a mission to become the world's most trusted and responsive payroll company, and to expand our impact by growing the company to \$5 million in annual revenue. I wanted to provide opportunities for everyone on the team to grow and expand; to go on a personal journey of growth to become a better leader; and to set an example for the industry that a fast-growing payroll company can remain customer-focused.

Three years later, our mission remains strong. We've achieved our company's goals, and along the way, countless dreams and aspirations of our team members have been realized.

We are celebrating this milestone, but our work isn't done. We have our sights set on the next milestone: taking the company to \$10 million, serving even more small businesses, and making an even bigger impact on the industry.

I feel an immense sense of gratitude for the opportunity to lead this company, and this team. Our mission is clear - we will continue to be the most responsive and trusted payroll partner for the small business community. I'm humbled and inspired by what our team will continue to build...together!

Tyler Winn, Founder & CEO

-Tyler Winn



VIVID VISION 2027