

CIRRUS PAYROLL



CIRRUS
VIVID VISION 2029



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 March 31, 2029, and we are wrapping up another exciting year of sensational growth. We are pursuing our mission and scaling the business, while staying true to our values. We have really hit our stride. Cirrus is an exciting place to be!



MISSION

To deliver sighs of relief to accountants and their small businesses clients, by being the world's most responsive and trusted payroll company.

CORE VALUES

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

- ✓ **Create Confidence Through Communication:** We respond quickly, communicate clearly, and provide consistent updates so clients and teammates always feel informed and confident we're on it.
- ✓ **Close Every Loop:** We relentlessly follow through on problems, tasks, and commitments until they are fully resolved.
- ✓ **Be a Fountain (Not a Drain):** We bring positive, helpful energy to every interaction, lifting the people around us instead of draining them.



DYNAMIC CULTURE

Because we are true to our shared mission and values, we have a strong culture, and a team that genuinely enjoys working together. 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.



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 Visionary, Integrator, Director of Operations, and Chief Revenue Officer. We put aside personal ambition and always strive to do what's best for the company and empower the team to reach their potential.
- ✓ **Our Operations Team** is the heartbeat of Cirrus, combining expertise, world-class communication, and a genuine passion for serving our clients.
 - **The Payroll Team** delivers exceptional service with lightning fast response times and a positive attitude that clients rave about.
 - **The Implementation Team** brings together payroll and project management pros who have developed a system that allows us to onboard new clients quickly and seamlessly, at high volumes that competitors can't match.
 - **The Tax Team** is known for its deep compliance knowledge and well-organized processes that keep every detail on track—from registrations and filings to deposits, amendments, and notice resolutions.

Together, these teams make sure every client experience is smooth, accurate, and supported by people who truly care.

- ✓ **Our Revenue Team** drives strong, consistent growth by building trust-based relationships with accounting partners. They are growing our referral channel year over year in both size and quality. They have greatly expanded our network of accounting partners, deepened engagement, and created a clear, repeatable referral process that consistently produces new client relationships. This work is supported by a consistently executed marketing program, including a defined marketing calendar and a website that clearly communicates our value and reinforces trust with partners. Because of their efforts, our pipeline is strong, predictable, and fueled by long-term partnerships.
- ✓ **Our Team of Assistants** help 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 lead with payroll—by design. Cirrus was built on a world-class payroll foundation, and payroll remains our primary point of entry, our deepest expertise, and the reason clients and referral partners trust us. When payroll is done right, everything else works better.

While payroll is our focus, we also support clients with complementary workforce solutions as needs arise, including time and attendance, retirement plans, workers' compensation, and workforce management tools. These services are introduced thoughtfully and intentionally; never a hard sell.

By leading with payroll and supporting it with the right tools at the right time, we deliver a simple, cohesive experience that removes complexity for clients and reinforces Cirrus as the trusted partner for managing payroll.



REVENUE

We have cemented our reputation in the market as the most responsive payroll company on the planet®, and our Revenue Team has capitalized on our client-centered model. They have created a predictable growth engine by leading with payroll and building deep trust with referral-partner accountants.

Our strategy is clear and disciplined. We lead with payroll, our strongest capability and the foundation of client and partner confidence. We bring on a high volume of new clients primarily through accountant referral channels. Every new client enters Cirrus through a simple, clear payroll offering that delivers immediate value and sets the tone for a long-term relationship.

From there, we grow revenue by thoughtfully expanding the services we provide to existing clients. Once payroll is running smoothly, our Revenue Team introduces additional solutions—such as timekeeping, workers compensation, retirement, and workforce management services—through clear education and strategic opt-out campaigns. This approach increases the value of our offering along with revenue per client while preserving the simplicity of our payroll-centered model.

As a result of this payroll-forward, referral-driven strategy, Cirrus has grown to more than 2,000 clients and achieved a \$5 million annual revenue run rate. Our growth is not fueled by aggressive selling, but by trust, responsiveness, and a repeatable model that accountants and clients are confident recommending.

FINANCIALS

Cirrus remains privately-owned. We are generating \$5 million in annual revenue at consistent 25%+ profit margins. 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 training 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 V/TO. 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 these funds to support the dreams of children with critical illnesses.

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 building team spirit and making a meaningful impact in people's lives outside the company.



FOUNDER FEELING



I believe we are making a real impact on our small business and accounting partners. We are delivering “sighs of relief” every day to people whose day might otherwise be mired in frustration if we were not their payroll service. Because of the positive impact we have, I want to continue to expand our impact by growing our client base and expanding our partnerships.

I also believe that with our supportive team and thoughtful culture, that Cirrus is just a great place to work! I want to grow the team, and provide opportunities for everyone.

Finally, I want 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 have achieved our company's goals; provided sighs of relief to countless people; and grown as individuals and as a team along the way.

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 accountants, and making an even bigger impact.

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 accountants and their small business clients. I'm humbled and inspired by what our team will continue to build... together!

Tyler Winn, Founder & CEO

-Tyler Winn



CIRRUS
VIVID VISION 2029