

FullCircl Workshop Guide

Agenda & Objectives

Workshop Guide

Unlocking Potential, Empowering Growth

Why should you invest your time?

1. **Clarity Amidst Complexity:** Gain a clear understanding of your objectives, challenges, and opportunities. Identify potential roadblocks and devise strategies to overcome them.
2. **Collaborative Problem-Solving:** Engage in interactive sessions with experts to brainstorm innovative solutions. Gain collective insights to address complex issues and capitalise on untapped opportunities.
3. **Tailored Solutions, Tangible Results:** Receive personalised recommendations tailored to your unique needs and goals. Translate insights into actionable plans with measurable outcomes.
4. **Maximizing Return on Investment:** Invest your resources wisely by prioritising initiatives with the highest potential for impact.

Topics typically covered include:

1. Introduction (15 mins)
 - Welcome and Introductions
 - Overview of Workshop Objectives and Agenda
2. Understanding Your Business Landscape (30 mins)
 - Business Overview: Mission, Vision, and Values
 - Walkthrough current workflow
 - Time taken per step
 - Who is involved
 - Customer conversion rates
 - Existing automation
 - Where does your data come from/how often is it reviewed
 - Market Analysis: Current Trends, Competitive Landscape, and Customer Insights
3. Defining Objectives and Key Challenges (15 mins)
 - Clarifying Short-Term and Long-Term Goals
 - Identifying Key Challenges and Pain Points
 - Prioritizing Areas of Focus for Discussion
4. Interactive Brainstorming Session (30 mins)
 - Facilitated Discussion on Key Challenges and Opportunities
 - Generating Creative Ideas and Solutions
 - Leveraging Diverse Perspectives and Expertise

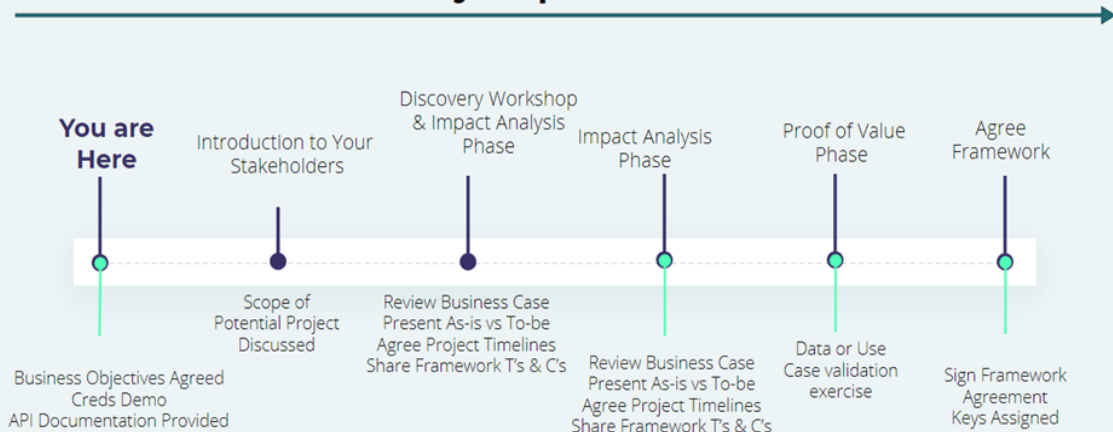
Integration & Testing

Deliverables

To assess integrations, we offer the provision of API keys to facilitate functional testing. These API keys grant access to all API calls within our production environment, allowing testing with real-time, real-life data.

A data extract can be performed to assess the quality of data, if you provide the details of a group of companies you wish to test against. See below for details of our 6-8 week integration process and key steps/considerations

6-8 Week Process – 6 key steps



Benefits

Supercharge onboarding

Eliminate manual tasks and duplication to cut onboarding times from weeks to minutes, whilst also enhancing the customer experience.

Smart decisioning for a faster time to revenue

Enhance the operational efficiency of your credit practices through better collaboration, tasks automation and digitalisation of manual and paper-based processes

Increase commercial opportunities

Stay on top of changes to a customer's information at all times and deliver more tangible, commercially-beneficial outcomes. Let your front office spend more time building relationship with their customers.

Reduce cost to serve

Remove friction, reduce cost, and realise more benefits for staff and the customers they serve, through the consolidation of your legacy systems in a single platform.

Reduce risk and increase value

Access a single source of company truth, spot issues and act on opportunities that help build, strengthen, and expand customer relationships