FullCircl

FullCircl Platform

Trial Success Guide

We want to help you get the most from your FullCircl trial. FullCircl is more than a tool - it's a way of selling more effectively.

FullCircl's dedicated onboarding team, academy learning management system and customer success group ensures organisations get ongoing value and ROI from FullCircl.

To evaluate the potential of FullCircl to its fullest, make sure you have a tick in each box at the end of your trial period.

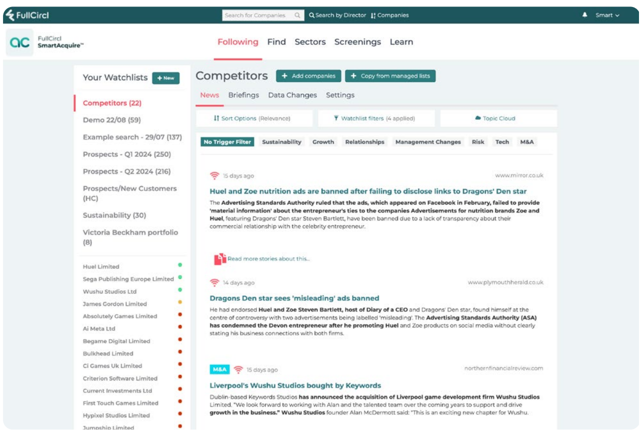
1. Logging on

Head to demo.artesiansolutions.com

Log in using the details given in the email you received:

Username: [Firstname].[Lastname]@fullcircl.com

Password: [Firstname].[Lastname]@fullcircl.com



2. Training & Setup

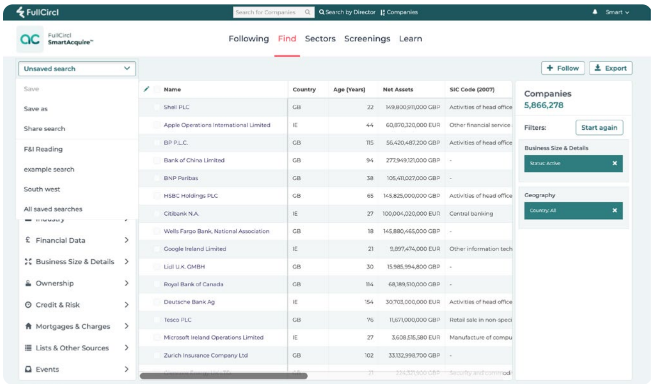
Invest some time in the **Academy** to familiarise yourself with the service and all its possibilities.

You have access to introductory webinars, setup guides and how-to videos.

Next, create some lists to categorise how you receive and view news and insights, known as watchlists:

- Customers watchlist (add >10 existing clients)
- Prospects watchlist (add >10 companies in your target account list)
- Competitors watchlist (add your own competition in the marketplace)

3. Find Companies



Head to the Find Tab, take a moment to reflect on who your target market, your territory and traits of your most successful clients:

Narrow down your search criteria with precision using our 90 filters in 10 different groups. Find prospects by financial characteristics, geography, industry, credit profiles, ownership characteristics and more.

a. Choose a Geographic area to focus your search on:

You can use any single, or combination of Postcodes, Town/City, Region or Country's to cover your territory.

b. Select the industries relevant to you:

Use FullCircl Business Categories (ABCs) under the industry drop down.

This allows you to search for a 'thing', such as Food or Machinery, or an activity, such as Manufacturing or Retail – thanks to a greatly expanded SIC catalog.

Display the data that matters most with our customised results table feature, allowing you to build a results table that aligns perfectly with your prospecting strategy.

TIP: Tweak your search as appropriate for your quota - you can filter down the news for these companies later, so aim to create lists of 40-120 businesses.

4. Viewing & Filtering News

Return to the Following tab to view your newly created watchlists. To make your newsfeed hyper-relevant:

- Try using the sorting options
- Set some Watchlist filters such as Financials, Hot Topics, Roles (Click Watchlist Filters, then Edit filters)

TIP: You can tailor news to only show you the stories you care about, whether that is Sustainability, Management Changes, Growth, Risk, and all easily accessible using the Trigger Filter search bar.

5. Finding & Sharing Insights

Share News insights with a colleague or with your network

a. Share an article with a colleague via email

b. Mention insights or news on a call or in conversation with a prospect – personalisation is key to building better relationships and staring on the right foot.

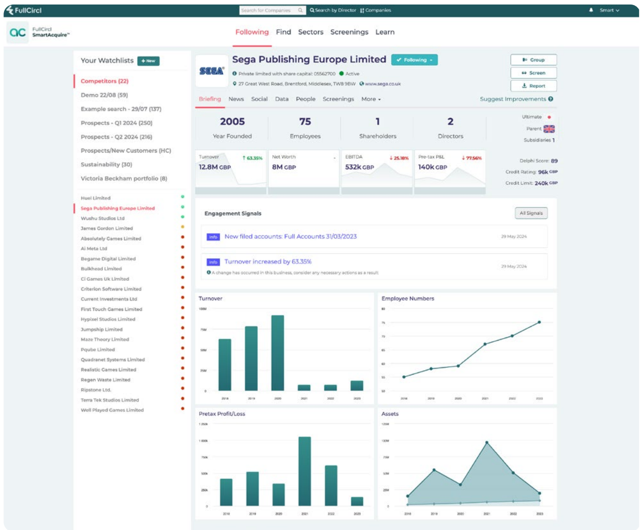
c. Browse the Markets tab for industry wide news. Share a news story on your social media channels (LinkedIn/X) and boost your social eminence.

6. Specific Companies

View a specific company – this can be done by searching in the search bar, or by selecting one from your Watchlists:

- Check their recent news
- Check their social media feed in the Social tab
- Head to the Data tab. Here, you'll get access to the following information for the company.

- Address
- FCA Authorisations
- Financials
- Documents
- Mortgages & Charges
- Timeline
- Credit Risk
- CCJ & Legal Notices
- Adverse Director History
- Ownership
- Shareholders
- Corporate Structure
- HMRC Imports & Exports



TIP: Download their most recent annual accounts (company report). Give it a quick read for any:

- Strategies for the coming quarters or year
- Quotes from Directors or C-suite individuals
- Details on their biggest challenges and risk moving forwards

Use this information to personalise your outreach with eye catching opening statements.

- Go to the **People tab** - Here you can see the key people in a given company such as Directors, C-suite staff and links to research tools. If they hold a directorship elsewhere it will be listed when you click on their name – building a relationship with such an individual opens the door to several other businesses where they may introduce you.

7. Email Alerts

Keep an eye on your daily email alerts each morning:

a. Each Watchlist you have created has configurable email alert settings (available in the settings tab of each list within FullCircl). Go tweak them if you are seeing too much or too little.

b. By default, you will be fed some of the top stories concerning companies in each of your lists, giving you first-mover advantage. Go act on one of the insights and start a winning conversation!

What you can expect to achieve during your FullCircl trial

✓ **New** opportunities identified
✓ Account knowledge **improved**
✓ Stalled **opportunities re-engaged**
✓ **Phone calls** or **meetings** arranged
✓ **Decision-makers** identified
✓ Significant time saved in **researching** and **re-engaging** with contacts
✓ **Contextual insights** shared directly with contacts

Notes