

# Innovation Exchange Pitch

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We support SME's with their HR Journey. We do this by assigning a dedicated Account Manager when they join us. In short we help with documentation and advice

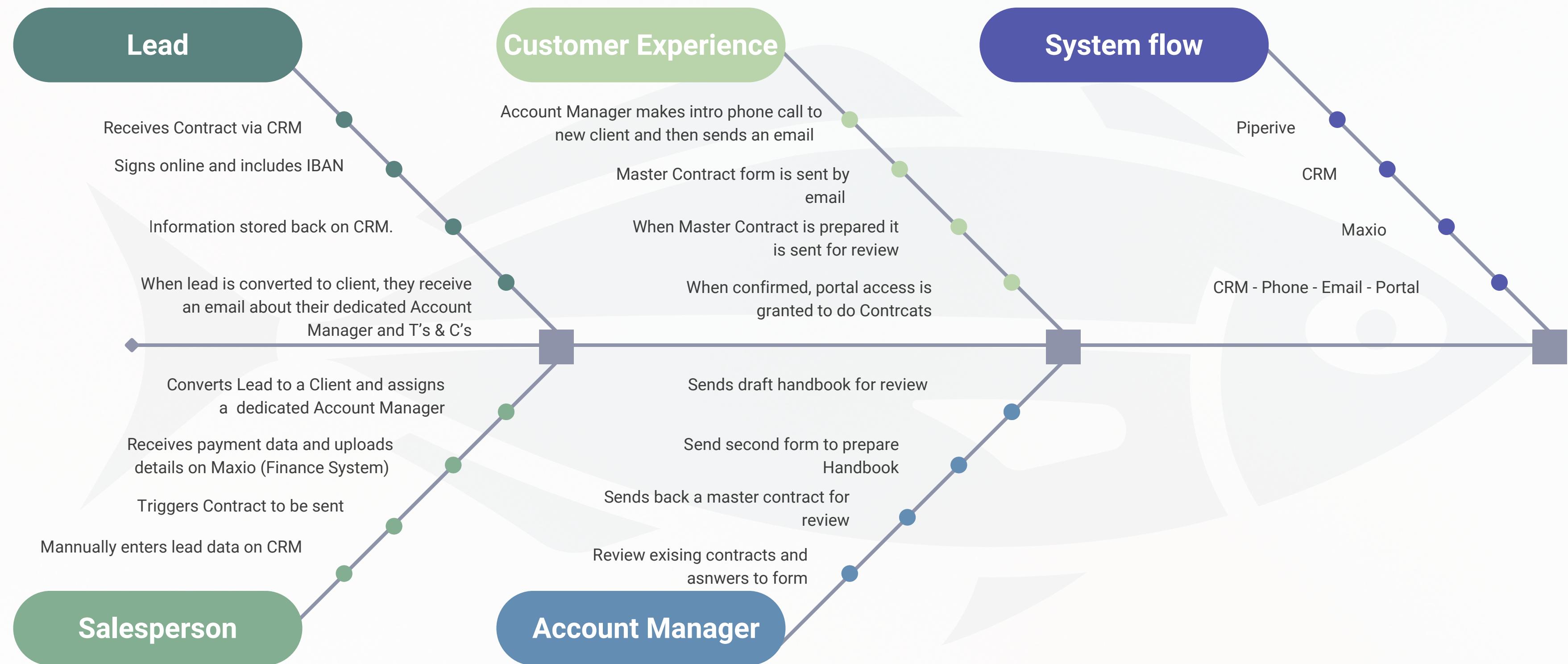
# THE PROBLEM

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- We have a flawed and drawn out sign up and on-boarding process, that no one gets right.
- The customer experience is old school.
- Staff don't know how to sign up a person properly.
- IT is required everytime.
- Consistency is a problem.
- Too many systems that don't talk to each other.



# ROUGH PROCESS FLOW



# SO WHAT'S THE PROBLEM

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## Problem One:

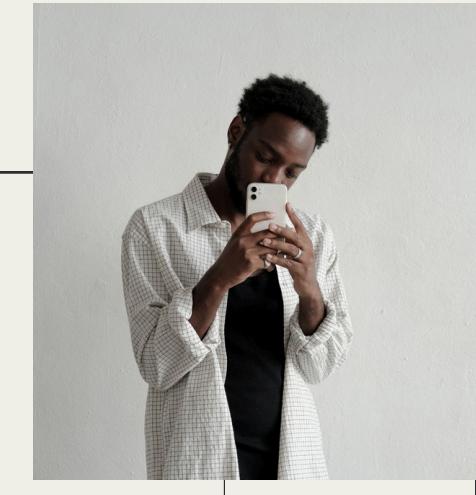
When a client wants to join us, the setup process is slow. They receive an email with a digital contract and are asked to enter their IBAN and sign the terms. These details are recorded on the CRM but not automatically setup on our finance system. This is done manually and when we have them setup on the finance systems, the numbers are manually entered again on the CRM.

## Problem Two:

Client on-boarding just seems wrong. They get an email to sign up. They then get another email from the Operations Director who assigns them to one of our Account Manager. They get another email from the Account Manager with a table style form to obtain additional details. They get another table/email a few weeks later for the handbook. They get another email if they sign for other services and they also get another email when portal access is enabled.



# SYSTEMS IN OPERATION



## *CRM* **vTiger CRM**

The open-source version of vTiger CRM is a free, community-driven customer relationship management software designed to help businesses manage their customer relationships, sales, marketing, and customer support.

## *Microosft 365* **Microsoft 365**

Self explanatory.

## *Customer Portal* **vTiger**

The vTiger Customer Portal provided by VT Experts is a powerful extension designed to enhance the customer experience and empower users with greater self-service capabilities. It allows businesses to give their customers a dedicated, branded space where they can manage their interactions with the business — whether it's for support, tracking sales, or accessing resources.

## *Data Protection* **uRISQ+**

uRISQ is a cloud-based (SaaS) privacy and security management suite, built to support small- to medium-sized businesses (SMBs) in meeting privacy and data protection requirements efficiently.

## *The HR Company*

# SYSTEMS IN OPERATION



## *Finance System* **Maxio (Adv Billing)**

Maxio Advanced Billing (formerly known as Chargify) is a flexible billing and revenue management platform tailored for B2B SaaS and subscription-based models. It empowers businesses to handle complex pricing, invoicing, customer subscriptions, and revenue operations efficiently.

## *HR System* **Natural HR**

Natural HR is a UK-based, cloud-hosted HRIS (Human Resources Information System) platform developed to streamline and automate HR processes across the full employee lifecycle — from recruitment to offboarding. It is widely used by small to medium-sized businesses and supports over 11,000 organisations across 191 countries.

## *Payment Gateway* **Stripe**

Self Explanatory

## *Payment Gateway* **GoCardless**

Direct Debit Processing

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# Thank you!

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