

# Unlock your **potential** with FYI's core capabilities

Unlock the full potential of FYI across your entire practice. Bring your documents, work, and automation together in one platform, improving visibility, reducing manual effort, and giving you **more time for more**.

**Looking to get more from FYI?**

**Ready to streamline how your practice operates?**

The Solutions Program provides a guided, hands-on approach across 12 structured sessions. Our experts work with your team to implement best practice workflows across documents, work, and automation, ensuring your practice is set up for long-term success.

**Enhance efficiency across your practice and build a smarter, more scalable way of working.**



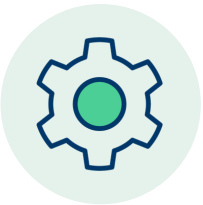
### **Manage your Documents**

Automatically file emails and documents, maintain quality and consistency across all documentation, and find what you need instantly. Work seamlessly with your team and securely share information with clients through the portal.



### **Manage your Work**

Manage tasks, jobs, and workflows in a single connected system. Improve visibility, streamline approvals and digital signatures, and ensure work progresses efficiently across your team.



### **Automate your Practice**

Connect your systems, automate client and job processes, and build custom workflows that run in the background. Save hours on routine tasks and create a more efficient, responsive practice.

**“ Practice success means being as efficient as we possibly can - FYI helps us achieve. ”**

**Lucy Handley, Accounts and Advisory Manager | Ammu**

## PROGRAM DETAILS

# Solutions Program

A structured, expert-led program delivered over 12 sessions, plus a post-program Q&A, focused on embedding best practice workflows into your business. We work alongside your team to configure, optimise, and embed FYI so your team have more time for more.

### This service is for you if:

- ✓ You want to get more value from your FYI
- ✓ You need some extra assistance to improve implementation of FYI's core features
- ✓ You have dedicated FYI Champion(s)/team member(s) for this program to ensure your success with FYI

### Service details:

Included	Details
12x 60-minute sessions*	Hands-on, structured sessions to implement best practice across all core features of FYI
1x 60-minute Q&A	Post-program completion dedicated Q&A to ensure your ongoing success
Resources & Recordings	Resources and recordings from your program to refer to and use as on-going resources for your team

**TOTAL INVESTMENT (exc taxes)**

**\$2,200**

If you're interested in this program, complete the form to kick off your project.

[ENQUIRE ABOUT THE PROGRAM](#)

**Stop scratching the surface of what FYI can do.  
Start running a smarter, faster, more automated practice.**

\*session details and training schedule can be found on the following page. The agenda for each session is set and cannot be altered, however, the order of these sessions may be restructured on discussion with your consultant.

## Training Schedule

### **Session 1: Emails that file themselves 60-minutes**

Learn how to eliminate manual email filing by using FYI to automatically capture, file, and organise every client email and attachment in a central location, giving your team instant visibility and access.

### **Session 2: Client communication visibility 60-minutes**

Learn how to capture client interactions ensuring full visibility over ongoing conversations, and allows anyone in your practice to quickly understand the full history of a client relationship, respond confidently, and deliver a more consistent, connected client experience.

### **Session 3: Quality assurance and integrity for all documentation 60-minutes**

Learn how to ensure consistent filing, version control, and easy retrieval of documents. By standardising how documents are created, stored, and maintained, your team can reduce errors and maintain compliance.

### **Session 4: Find whatever you need in a flash 60-minutes**

Learn how to quickly locate any document, email, or piece of information using FYI's powerful search and filtering capabilities, removing the frustration of digging through folders or inboxes.

### **Session 5: Work effectively with your team and clients 60-minutes**

Learn how to collaborate seamlessly using FYI by sharing documents securely with clients through the client portal, ensuring sensitive information is exchanged safely and professionally.

### **Session 6: Manage tasks with ease 60-minutes**

Learn how to create, delegate, and track tasks within FYI, linking directly to emails, documents, and jobs, providing full context. With shared task lists, custom views, and real-time notifications, your team gains clear visibility over responsibilities, priorities, and deadlines, making it easier to stay organised, collaborate effectively, and keep work moving across the entire practice.

### **Session 7: Accelerate workflows and make your practice more responsive 60-minutes**

Learn how to streamline document approvals and digital signatures. By setting up structured approval processes, assigning responsibilities, and enabling secure e-signatures, your team can reduce delays, maintain compliance, and ensure documents are reviewed, approved, and sent efficiently, keeping work moving and clients responded to faster.

### **Session 8: Manage jobs the super easy way 60-minutes**

Learn how to manage and track all your jobs from a central workspace in FYI, giving your team clear visibility over every job's status, tasks, documents, and deadlines in one place. Your practice can easily monitor progress, identify bottlenecks, and ensure work is completed efficiently without switching between systems.

### **Session 9: Build your perfect app stack 60-minutes**

Learn how to connect FYI with your broader tech stack. By linking your systems and leveraging integrations, your practice can reduce double handling, keep information in sync, and build a connected ecosystem that supports more efficient and automated ways of working.

### **Session 10-12: Automate Your Practice 60-minutes each**

Learn how to automate client-related and job-related processes in FYI, from onboarding through to reminder communication and job rollovers. Plus a dedicated session to build a process of your choice, empowering you to unlock greater efficiency and scalability.



More time  
for **more**



[fyi.app](https://fyi.app)