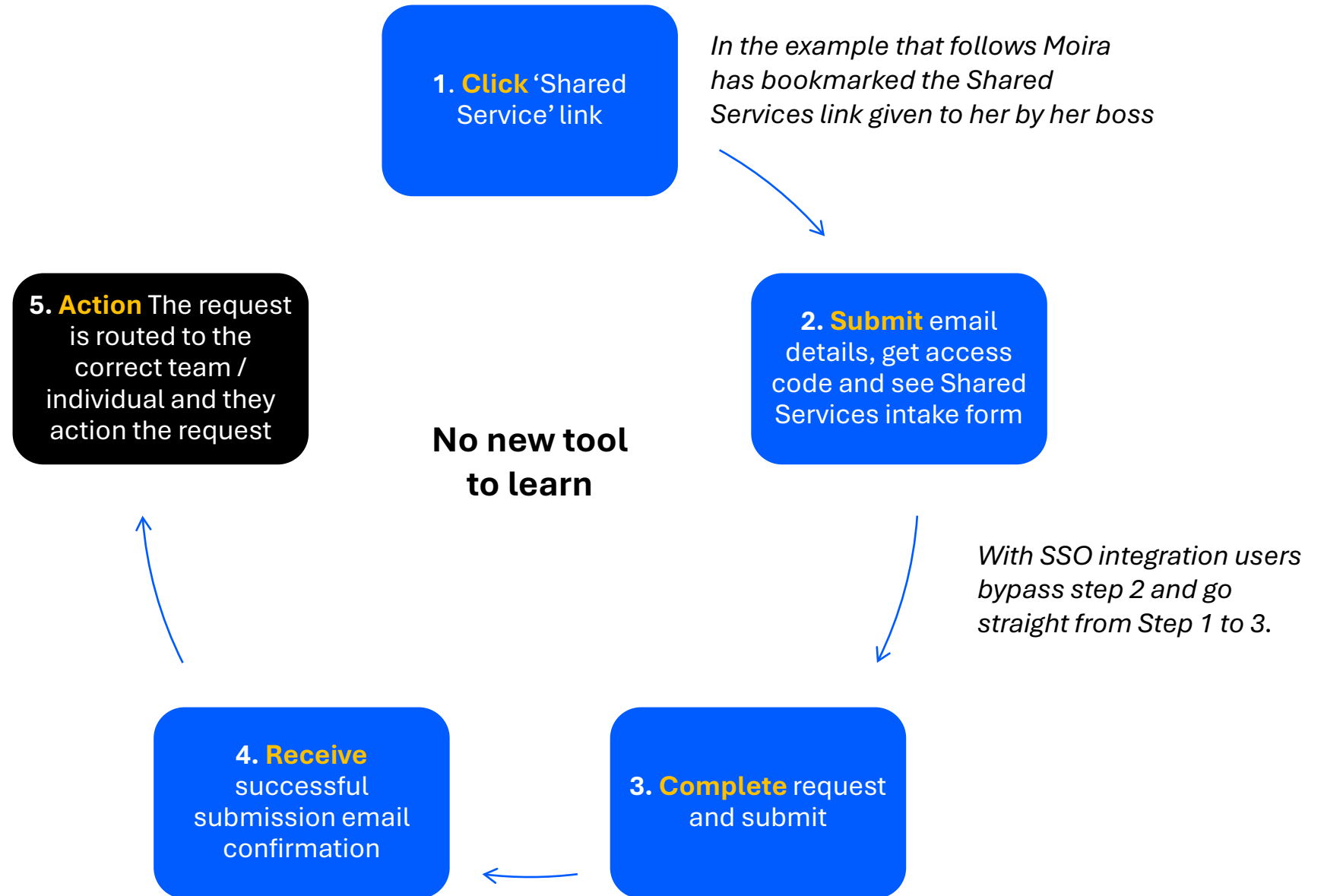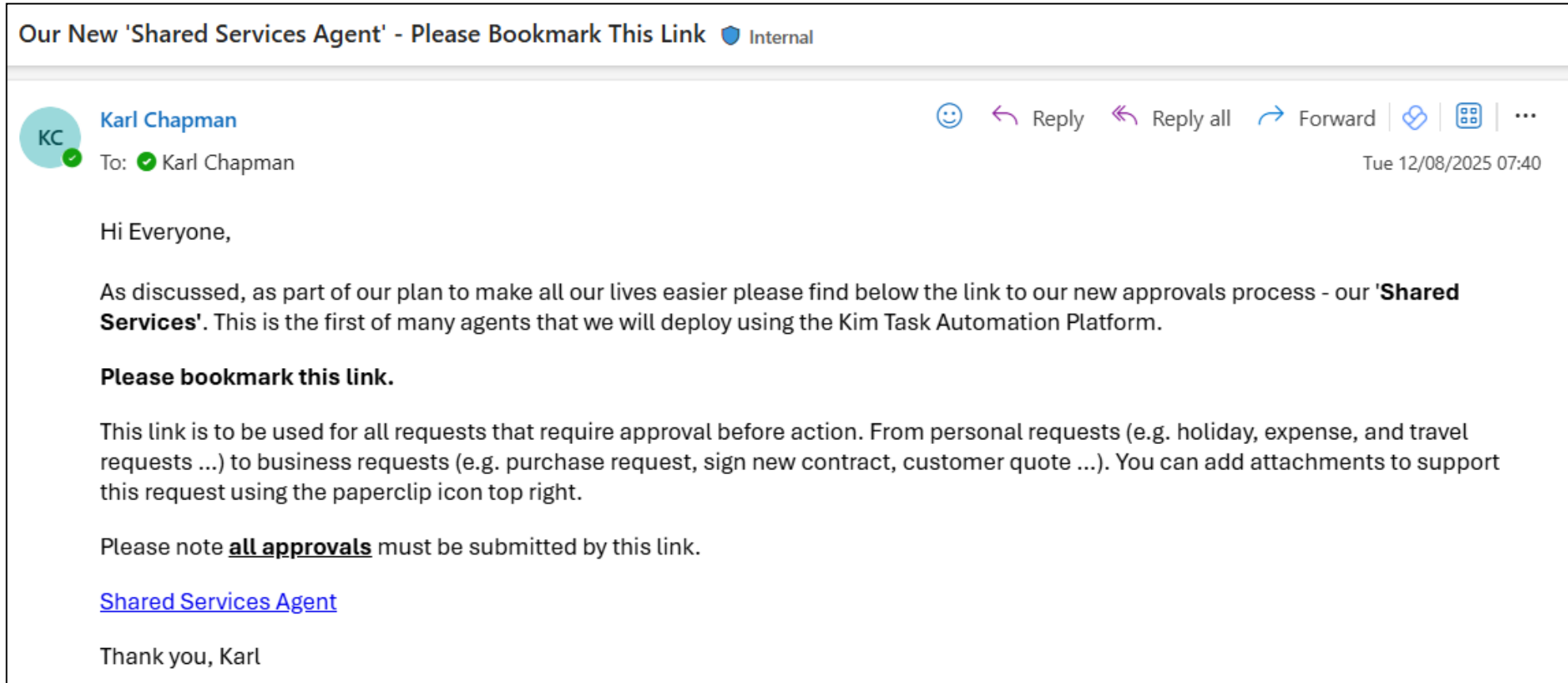# The User Experience

Meet Moira - she used to struggle to know where to send requests now she goes to one place - and colleagues and customers feel the difference ...

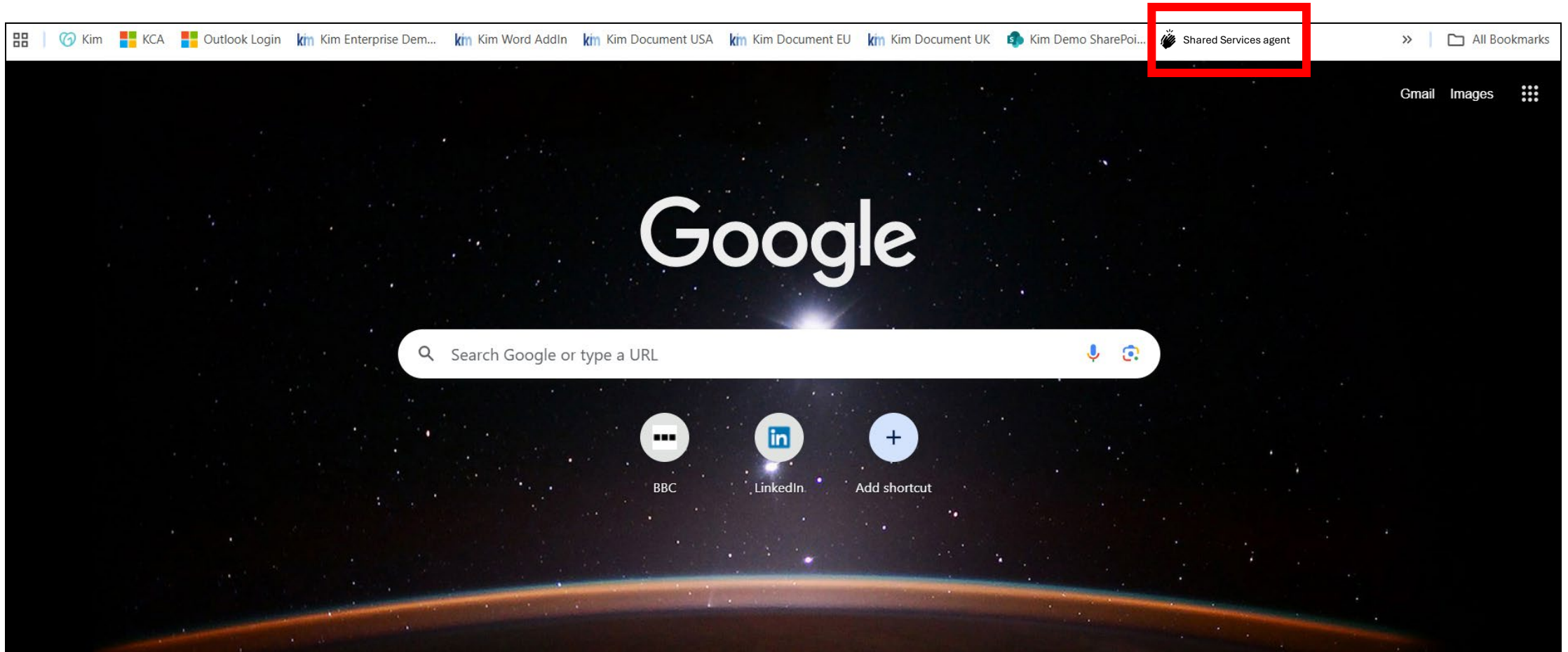**shared services agent.**
Click. Submit. Done.

The team User experience could not be easier

1. Click 'Shared Service' link

In the example that follows Moira has bookmarked the Shared Services link given to her by her boss

5. Action The request is routed to the correct team / individual and they action the request

No new tool to learn

2. Submit email details, get access code and see Shared Services intake form

With SSO integration users bypass step 2 and go straight from Step 1 to 3.

4. Receive successful submission email confirmation

3. Complete request and submit

shared services agent.
Click. Submit. Done.

Last week Moira received this email following a company Town Hall:

Our New 'Shared Services Agent' - Please Bookmark This Link 🛡 Internal

KC **Karl Chapman**

To: ✓ Karl Chapman

😊 ↩ Reply ↩ Reply all ↗ Forward ⬧ 🔳 ⋯

Tue 12/08/2025 07:40

Hi Everyone,

As discussed, as part of our plan to make all our lives easier please find below the link to our new approvals process - our **'Shared Services'**. This is the first of many agents that we will deploy using the Kim Task Automation Platform.

Please bookmark this link.

This link is to be used for all requests that require approval before action. From personal requests (e.g. holiday, expense, and travel requests ...) to business requests (e.g. purchase request, sign new contract, customer quote ...). You can add attachments to support this request using the paperclip icon top right.

Please note **all approvals** must be submitted by this link.

Shared Services Agent

Thank you, Karl

Moira needs to book time off work. She clicks the Shared Services Agent bookmarked link

shared services agent.
Click. Submit. Done.

Up pops the authentication link. Moira follows the instructions, receives a unique access code by email and submits

NOTE with SSO integration this step disappears

Shared Services Agent   ✕

Add Your Logo

Central Services Agent -Request Form

Welcome to our Central Services Agent. Please complete all fields, attaching any documents to support your request using the papeclip icon top right. So that we can route your request to the right team / i   . On submission you will receive email confirm   it has been sent to the appropriate team.

No Image

User Access

Welcome to the Central Services Request Agent. To access this agent please enter your email and follow the instructions.

This form
question   please think carefully before selecting your
choice. V   se do not claim your request is urgent if it is
not. It is   led first!

Email Address: *

Let's s

1. Requestor Details and Costs

Cancel   Access

(i) Your Name   *   **(ii) Your Role**   *   **(iii) Your Email**   *   **(iv) Type of Request**   *

⌄   ⌄

shared
services
agent.
Click. Submit. Done.

Shared Services Agent

Central Services Agent - Request Form

Welcome to our Central Services Agent. Please complete all fields, attaching any documents to support your request using the papeclip icon top right. So that we can route your request to the right team / individual please provide as much detail as possible. On submission you will receive email confirmation that your request has been received and that it has been sent to the appropriate team.

Add Your Logo

No Image

Your logo here

This form has four sections which should only
questions re 'urgency' of your request and its
choice. We use these answers to help us priorit
not. It is in all our interests that business critica

Let's speed up our organisation!

1. Requestor Details and Costs

(i) Your Name *
Moira Evans

(ii) Your Role *
Sales Executive

(iii) Your En
moira@sale

Moira completes the form and submits

Shared Services Agent

3. Central Services Category and Subject

(i) Customer Support

(ii) Data & Analytics

(iii) Facilities & Real Estate

(iv) Finance & Accounting

(v) HR / People Operations

I want to hire someone

I need to onboard or offboard an employee

I have a question about time off or leave

I need help with payroll or benefits

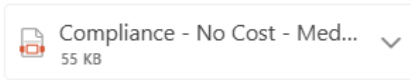I need support with performance reviews or feedback

(vi) IT

(vii) Legal & Compliance

(viii) Marketing Services

(x) Project Management Office

(xi) Sales & Proposals

(xii) Strategy & Transformation

MPANY 1

Submit   Cancel

shared
services
agent.
Click. Submit. Done.

1. Moira receives confirmation that her request has been submitted

Tue 12/08/2025 07:55

☺ ← Reply ← Reply all → Forward ⬦ ⊞ …

📄 Compliance - No Cost - Med... ⌄
55 KB

Thank you for submitting your request.

This has been routed to the appropriate individual / team.

They will respond to you as soon as they can.

The Central Services Assistant

This email and any files transmitted with it may contain confidential and/or propri
entity to whom addressed. This email may contain information that is held to be p

New Support Request - Central Services: From Moira Evans - Compliance - No Cost - Medium Urgency

KC **Karl Chapman**

To: ✓ Karl Chapman

☺ ← Reply ← Reply all → Forward ⬦ ⊞ …

Tue 12/08/2025 07:55

A new request has been received:

- **From:** Moira Evans

- **Type of Request:** Compliance - No Cost

- **Urgency:** Medium

Click here to access the request: **Compliance - No Cost - Medium Urgency**

The Central Services Assistant

2. The appropriate individual / team is notified of the request

This email and any files transmitted with it may contain confidential and/or proprietary information and is intended only for the individual or
entity to whom addressed. This email may contain information that is held to be privileged, confidential and exempt from disclosure under
applicable law. If you have received this email in error, please notify the sender by reply email and then delete this email and its attachments
from your computer. Neither the email content nor the attachments have been generated by Kim Technologies Group, Inc or any of its
subsidiaries.

3. The functional team respond to the request

It is that simple …

and everyone is happy!