

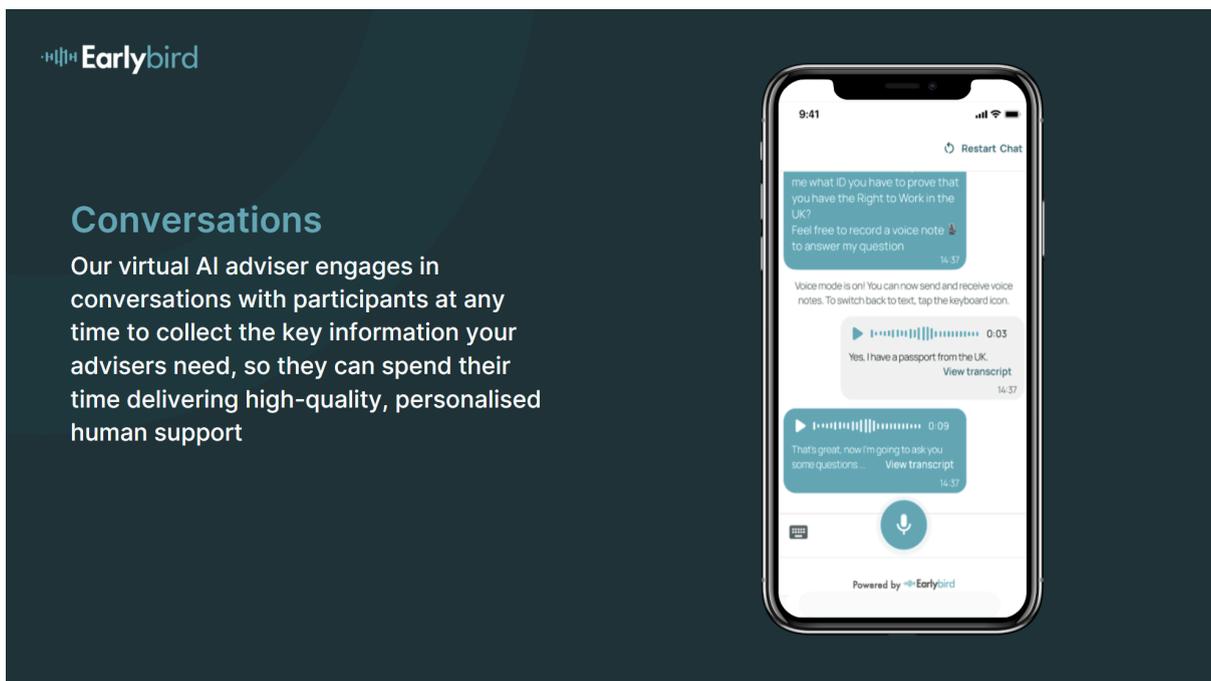
# Digital Engagement and Advisor Support Platform

## Overview

Earlybird is a disruptive digital platform that provides the citizen services sector with solutions to improve the productivity and effectiveness of their services. Our platform is designed to improve service productivity and quality by reducing administrative burden, and enabling more consistent, high-quality information capture from service users.

Our commitment to continuous innovation, coupled with a deep understanding of the diverse challenges faced by citizen support organisations, allows us to deliver high-quality, impactful software that makes a real difference in the lives of service users.

## Conversations



Earlybird offers an AI-powered engagement agent capable of interacting with participants through **phone or web chat**. This agent can be tailored to assist with triage, onboarding, check-ins, destination tracking, in-work support, feedback and evaluation and all information collection throughout a participant's journey. Following

each interaction, it delivers structured outputs - summaries, insights and analysis for frontline staff to review.

### **Key features**

- Phone-call and web-chat channels for participant engagement
- 24/7 availability for routine information capture (configurable by customer)
- Multilingual support to improve access for non-English speakers
- Configurable workflows for onboarding, triage, check-ins, and other information gathering
- Structured outputs (e.g., summaries and responses aligned to workflow questions)

### **Benefits**

- Reduces advisor administrative effort by automating routine information capture
- Improves participant engagement through accessible channels (phone or chat)
- Supports earlier identification of barriers and support needs
- Enables more consistent and structured information capture across teams
- Improves service responsiveness via out-of-hours engagement where required
- Reduces avoidable advisor workload through triage and signposting

### **Typical use cases**

- Triage and signposting to appropriate programme elements or specialist support
- Onboarding and initial information collection
- Pre-appointment information gathering to reduce appointment time spent on admin
- Regular check-ins to monitor progress and emerging needs

## Meeting Notes

Earlybird captures and structures meeting notes during **in-person or online** appointments between the caseworker and participant. This helps advisers focus on the participant rather than manual note-taking, while producing consistent and reviewable notes after the meeting. The service supports multiple languages and real-world environments (office, community locations). Where connectivity is unreliable, the service supports an offline-capable capture approach with later processing.

### Key features

- Automated capture of meeting notes for online and in-person meetings
- Supports multiple accents, languages, and real-world environments
- Offline-capable capture approach for low-connectivity settings
- Structured notes that can be reviewed and refined by advisers
- Barrier identification to support targeted planning and interventions
- Document generation from captured meeting information and uploaded materials e.g. CV, cover letter, assessments

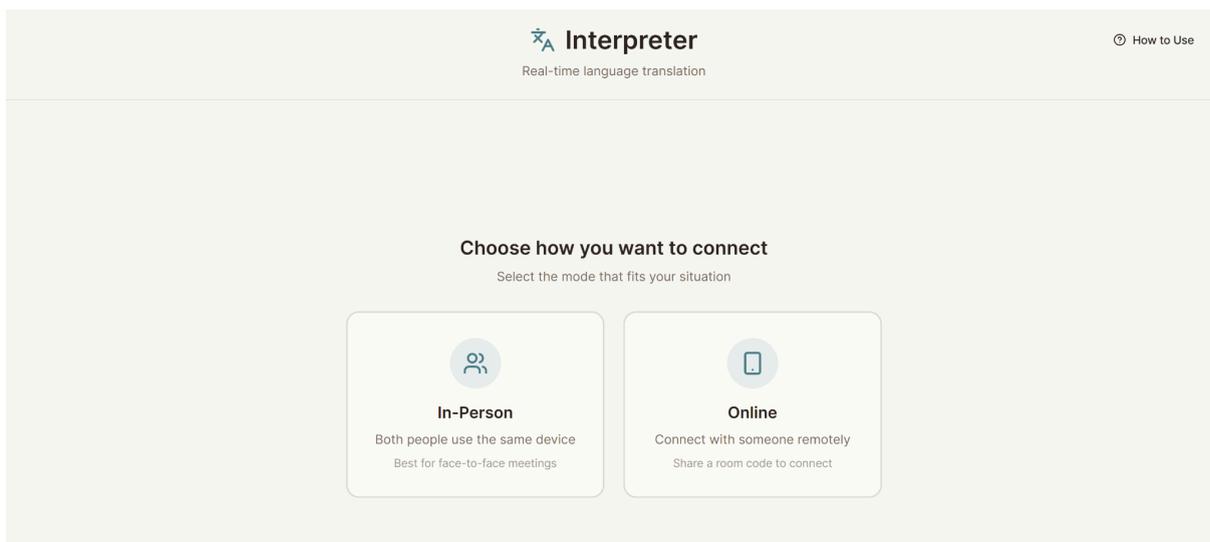
## Benefits

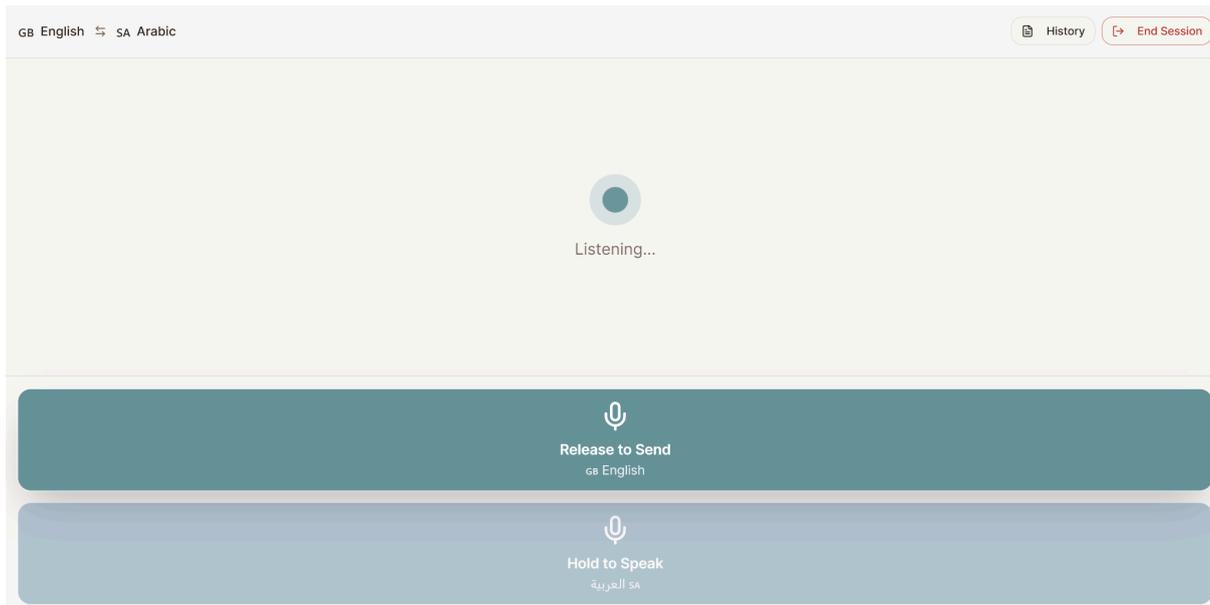
- Reduces time spent writing notes and administrative follow-up
- Improves the quality and consistency of notes and captured information
- Enables better advisor presence and participant engagement during sessions
- Supports faster conversion of meeting outcomes into participant actions (e.g., CVs)
- Reduces stress on advisors and improves service delivery experience
- Improves continuity and handover by producing consistent documentation

## Typical use cases

- Advisor appointments (in-person or remote)
- Outreach/community-based support where connectivity may be variable
- Producing materials automatically from meeting content e.g. assessments, CVs, cover letters, referral emails
- 1:1 appointments with service users and/or relevant stakeholders
- Group appointments with service users and/or relevant stakeholders

## Multilingual Interpreter





Earlybird provides a multilingual interpretation capability embedded within the platform to support conversations with participants who do not speak English. It is designed for use in both **in-person** and **remote** contexts and can be accessed on-demand to support service accessibility and inclusion.

### Key features

- Embedded real-time interpretation within the platform
- Supports in-person and remote interpreting scenarios
- 24/7 availability
- Supports **90+ languages**
- Designed to support natural conversational flow using modern voice technologies

### Benefits

- Improves accessibility and inclusion for non-English speakers
- Reduces reliance on scheduling external interpreters for routine interactions
- Enables faster engagement and reduces delays due to language barriers
- Improves the quality of understanding, supporting better decisions and next steps
- Supports consistent service delivery across diverse communities

## Typical use cases

- Onboarding participants with limited English proficiency
- Interpreting in appointments (remote or in-person)
- Supporting urgent, unplanned interactions where interpreter scheduling is difficult
- Ongoing engagement and check-ins for participants requiring language support

## Service levels and Support model

- **Availability target (SLA): 99.9%** service uptime (excluding planned maintenance).
- Planned maintenance is scheduled in advance where possible and communicated to customers.

**Service measurement:** uptime is measured at the service boundary (ability to access and use the platform's core functionality).

Earlybird provides customer support via:

- Email / In-product
- Named Customer Success Manager for onboarding, adoption and service review
- Training materials (guides and short-form how-to documentation)
- Optional refresher training sessions on request

**Support hours:** to be confirmed in the service order (typical UK business hours with agreed escalation paths for critical incidents).

## Onboarding and implementation

We can set up organisations in as little as 5 days. Earlybird onboarding includes:

- **Discovery and configuration:** confirm use cases (e.g., onboarding, check-ins), workflow configuration, and language requirements
- **Information governance alignment:** confirm retention requirements, access controls, and operational procedures
- **Training:** role-based training for advisors and managers, including best practices for consent and appropriate use
- **Go-live support:** initial go-live monitoring and support to drive adoption

However, implementation timelines can be impacted by scope (channels required, workflow complexity, and integrations). A typical mobilisation is delivered through structured onboarding with a Customer Success Manager.

## Offboarding and exit management

On service exit, Earlybird supports:

- Export of customer data (format and scope agreed in the service order)
- Account de-provisioning and access removal
- Confirmation of retention or deletion activities aligned to contract and customer policy
- Knowledge transfer to support continuity where required

## Data protection and residency

- Data is stored and processed in the **UK and/or EEA** (as agreed with the customer).
- Data processing is aligned to **UK GDPR** requirements, including purpose limitation and secure handling.
- Data retention is configurable in line with customer policy and contractual agreements.

## Security and compliance

Earlybird operates an information security management approach appropriate for public sector use and holds:

- **Cyber Essentials**
- **Cyber Essentials Plus**
- **ISO/IEC 27001**

Security controls include but are not limited to:

- Encryption in transit (TLS)
- Encryption at rest (AES-256 at storage layer for databases and backups)

- Key management processes covering generation, storage, use and destruction
- Role-based access controls and least-privilege access
- Vulnerability management with defined scanning and remediation timelines

## Customer responsibilities

Customers are responsible for:

- Providing appropriate user access lists and role requirements
- Ensuring the relevant staff member obtains appropriate consent when capturing information from service users
- Providing programme-specific content and operational policies where needed for workflow configuration (e.g., signposting routes, triage rules)
- Ensuring end-user devices meet minimum technical requirements (below)

## Technical requirements

To use Earlybird, customers need:

- A modern web browser on laptop/desktop/tablet/mobile
- Microphone access for meeting capture and phone-based workflows (where applicable)
- Internet connectivity (offline-capable capture is supported for some use cases, but processing and review require connectivity)
- Organisational email accounts for user access and support

## Dependencies

Service delivery may depend on:

- Telephony routing/integration arrangements where customers want phone-based participant engagement
- Customer-provided operational content for signposting and triage workflows
- Availability of customer endpoints where optional integrations are in scope (if contracted)

## Service constraints

- The service requires appropriate consent and user safeguards for recording, transcription, or interpretation use cases.
- Output quality depends on environmental factors (background noise, device microphone quality), though the platform is designed to operate in real-world settings.

## Roadmap and upgrades

Earlybird regularly releases product updates, including security patches, performance improvements and new functionality. Release notes and customer communications are provided as part of normal service operations. Where changes materially affect how customers use the service, Earlybird provides enablement guidance and training updates.

*Contact - Email: [opportunities@getearlybird.ai](mailto:opportunities@getearlybird.ai) - Tel: +44 7715920756*