

Automate two processes, prove the value in 12 weeks

A focused 12 week proof of concept on two high volume workflows: onboarding new hires and support ticket triage. The goal: demonstrate a measurable time saving and consistent processing quality, on real data, with human validation before every write.

SPONSORS

Camille Rousseau · Julien Marchand
CONFIDENTIAL

PROJECT LEAD

Sofia

SCOPE

WF1 · WF2

START

March 9, 2026
01 / 19

AGENDA

Today's agenda.

- 01 Intro**
Introductions · context and objectives recap
- 02 Business**
Stakeholders · KPIs · as-is process · scope · timeline
- 03 IT**
Systems · access · APIs · security · governance
- 04 Ways of working**
Cadence · communication channels · escalation
- 05 Next steps**
Immediate actions · owners · deadlines · next meeting

■ GOAL OF THIS MEETING

Align the business and IT teams on scope, access and the plan for the next 12 weeks.

■ ESTIMATED DURATION

90 minutes






■ DELIVERABLES OF THIS MEETING

Confirmed scope, list of access to provision, validated plan and immediate actions with owners.




PARTICIPANTS

Introductions.

NORTHWIND RETAIL

 Camille Rousseau Chief Operating Officer GO / NO-GO DECISION	 Julien Marchand Chief Financial Officer GO / NO-GO DECISION	 Sofia Renard Project lead · implementation POINT OF CONTACT	 Thomas Lefebvre Head of IT IT OWNER	 Amina Diallo Data & Security IT OWNER
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NEXUS, DEDICATED FDE TEAM

 Alex Moreau Executive Sponsor EXECUTIVE SPONSOR	 Lea Fontaine Project Lead MAIN CONTACT	 Marc Dubois Forward Deployed Engineer FDE LEAD
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WHY THIS POC

Two manual processes that overload the teams.

The HR and support teams handle hundreds of cases by hand every month: re-keying, email back and forth, prioritisation by guesswork. Volume grows faster than headcount. This POC targets the two workflows where automation will have the most visible impact.

01

WORKFLOW · ONBOARDING NEW HIRES

An onboarding path with no re-keying, ready on day one.

From contract signature to account creation and the welcome kit, orchestrated automatically with a human check before every sensitive action.

02

WORKFLOW · SUPPORT TICKET TRIAGE

Every ticket qualified and routed in under a minute.

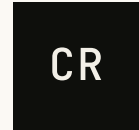
Sorted by urgency and topic, suggested reply, automatic escalation of critical cases to the right team.

OBJECTIVE →

Cut manual processing time in half across both workflows, without degrading quality or compliance.

The stakeholders.

SPONSORS



Camille Rousseau
Chief Operating Officer

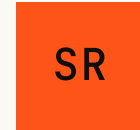
GO / NO-GO DECISION



Julien Marchand
Chief Financial Officer

GO / NO-GO DECISION

PROJECT LEAD



Sofia Renard
Operational implementation

Coordinates the business teams, arbitrates POC priorities and signs off on interim deliverables.

MAIN POINT OF CONTACT

NEXUS FDE



Marc Dubois
FDE

Technical implementation · works alongside Sofia.

NEXUS POINT OF CONTACT

What does success look like in 12 weeks ?

An open discussion. The aim of this session is not to lock in numbers, but to agree on **what would make this POC unmistakably successful** in the eyes of the sponsors and the teams, before we measure the baseline in week 1.

WORKFLOW 01 · ONBOARDING NEW HIRES

How will we recognise a successful onboarding?

NOTE-TAKING SPACE, TO FILL IN TOGETHER

WORKFLOW 02 · SUPPORT TICKET TRIAGE

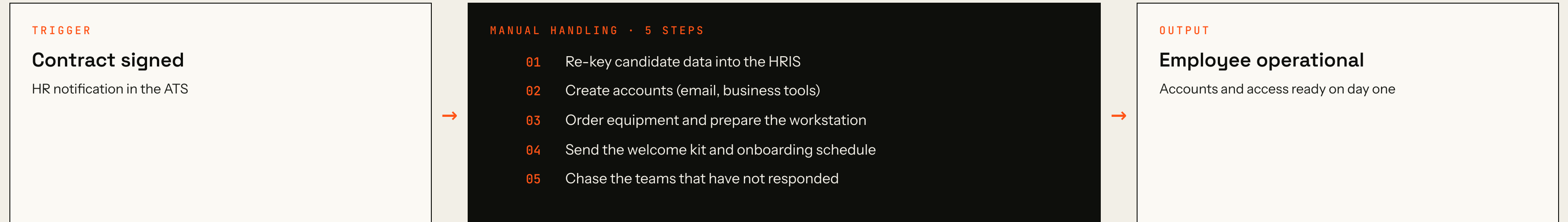
How will we recognise a successful triage?

NOTE-TAKING SPACE, TO FILL IN TOGETHER

TO FRAME TOGETHER → Which outcomes matter most? For whom? How do we measure them?

Onboarding new hires, current state.

88/100 AUTOMATION SCORE



FRICTION POINTS

- △ Data re-keyed across three different systems
- △ No visibility on the status of a case
- △ Frequent delays on access on the first day

MEASURED ACTUAL WORKLOAD

120 /mo New onboarding cases

40 min Average manual time per case

80 h Team time spent / month

180h

TOTAL TEAM WORKLOAD / MONTH

150h

AVAILABLE TEAM CAPACITY

20%

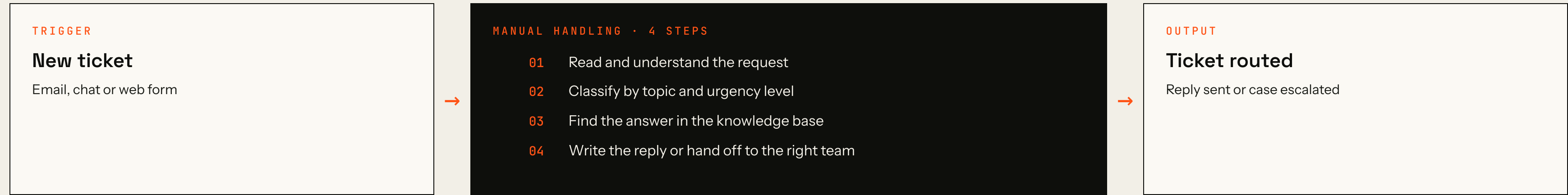
OVERLOAD RATE

The overload spills over onto deadlines and case quality.

Support ticket triage, current state.

96/100 AUTOMATION SCORE

1,400 Tickets / mo
6 Inbound channels
12 Categories
70% Recurring questions
4 h First response time
3 Support agents
Volume spikes not absorbed during sale periods



FRICITION POINTS

- △ Identical manual sorting repeated hundreds of times
- △ Urgent cases lost in the queue
- △ Inconsistent replies depending on the agent

MEASURED ACTUAL WORKLOAD

1,400 /mo Inbound tickets

6 min Average sorting time per ticket

100 h Team time spent / month

180h TOTAL TEAM WORKLOAD / MONTH
 -
150h AVAILABLE TEAM CAPACITY
 →
20% OVERLOAD RATE
 |
 Manual sorting ties up the team at the expense of complex cases.

CONFIRMED SCOPE

Two workflows, one shared base, a deliberately tight scope.

IN SCOPE FOR THE POC

- ✓ Onboarding: from signature to access provisioning
- ✓ Triage: classification, suggested reply and ticket routing
- ✓ Human validation before every system write
- ✓ Shared tracking dashboard for business and IT

OUT OF SCOPE

- ✗ Rebuilding the existing systems (HRIS, ticketing tool)
- ✗ Fully automated end to end processing without oversight
- ✗ Migrating or cleaning historical data
- ✗ Rollout to other teams or countries

SUCCESS CONDITION → Both workflows run in production on real data, with a time saving measured and validated by the sponsors.

PLANNING

Setup, build, review, go-live.

From discovery to a monitored go-live, with a review every week.

WORKSTREAM	W1 09/03	W2 16/03	W3 23/03	W4 30/03	W5 06/04	W6 13/04	W7 20/04	W8 27/04	W9 04/05	W10 11/05	W11 18/05	W12 25/05
00 Setup	DISCOVERY · ACCESS · DATA											
01 Onboarding new hires			BUILD · TEST · UAT									
02 Support ticket triage				BUILD · TEST · UAT								
03 Production							MONITORED PRODUCTION · FINE TUNING					
WEEKLY REVIEWS	---	---	---	---	---	---	---	---	---	---	---	---

GO-LIVE · W6

■ SETUP / PRODUCTION
 ■ WF1 · ONBOARDING NEW HIRES
 ■ WF2 · SUPPORT TICKET TRIAGE
 --- WEEKLY REVIEWS
 --- SPRING BREAK
 | TARGET GO-LIVE · W6

▲ **PLANNING RISK** The spring break (W7 to W8) reduces team availability. Access must be provisioned before W3 to hold the go-live.

TECHNICAL LANDSCAPE

System map.

HR / ATS

ATS (applicant tracking)

Source of signed contracts and candidate data.

- API AVAILABLE

HR / HRIS

HRIS

System of record for employees, accounts and roles.

- API TO CONFIRM

SUPPORT

Ticketing tool

Inbound queue for tickets across all channels.

- API AVAILABLE

KNOWLEDGE

Knowledge base

Articles and procedures used to answer tickets.

- API TO CONFIRM

EXTERNAL SYSTEMS

Email, identity management (SSO) and e-signature tool, to be mapped in week 1.

IT CONTACTS, TO CONFIRM

HRIS, ticketing and security owners to be named at kick-off.

TO VALIDATE TOGETHER → Have we missed a key system? Any business tool used day to day, even occasionally, must be identified now.

ACCESS

Credentials and environments.

SYSTEM	ACCESS TYPE REQUIRED	OWNER	DEADLINE	STATUS
ATS	API read account	Thomas Lefebvre	W1	TO DO
HRIS	API read / write account (sandbox)	Thomas Lefebvre	W2	TO DO
Ticketing	API account + webhook	Amina Diallo	W1	TO DO
Knowledge base	Read access (export)	Sofia Renard	W2	TO DO
SSO / Identity	Test account provisioning	Amina Diallo	W2	TO DO

△ BUILD All access in a test / sandbox environment for the build phase. No production data before go-live.

Available APIs and constraints.

CONFIRMED / KNOWN APIS

- ✓ ATS: documented REST API, read signed contracts
- ✓ Ticketing: API and inbound webhooks available
- ? HRIS: write scope to confirm with the vendor
- ? Knowledge base: export format to validate

OPEN QUESTIONS, TO RESOLVE IN W1

- ? API call quotas on the HRIS sandbox?
- ? Real time webhook or periodic polling on ticketing?
- ? Account creation via SSO or directly in each tool?
- ? Format and freshness of the knowledge base articles?

Sensitive data, GDPR, safeguards.

DATA PROCESSED

- ! Employee identity data (civil status, contact details)
- ! HR contractual and administrative data
- ! Customer ticket content (personal data)
- ! Credentials and system access rights

GDPR PRINCIPLES APPLIED

- ✓ Minimisation: only the necessary fields
- ✓ No retention of sensitive data in Nexus logs
- ✓ Full traceability (who approved, when)
- ? Nexus ↔ Northwind Retail DPA, to finalise

TECHNICAL SAFEGUARDS

- ✓ Mandatory human validation before every write
- ✓ Isolated test environment, anonymised data
- ✓ Encryption in transit (TLS 1.2+) and at rest
- ? Log retention policy, to align with IT

TO VALIDATE WITH THE DPO → Confirm the legal basis, retention period and DPA scope before processing any real data.

Who approves what, and how long it takes ?

ACCESS APPROVAL PROCESS

01 Formal access request
Nexus submits the list of required access to Sofia

02 Sponsor validation
Camille / Julien approve the access scope

03 Provisioning by IT
IT / system owners create the accounts

04 Nexus validation
Connectivity test + confirmation access is operational

IT CONTACTS, TO IDENTIFY

- ? HRIS owner. Accounts, roles and write scope
- ? Ticketing owner. API, webhooks and categories
- ? Security / identity owner. SSO and provisioning
- ? Knowledge base owner. Access and export format
- ? **DPO.** GDPR validation · DPA · processing register

LEAD TIME →

Allow 5 to 10 business days for access creation. Submit the requirements at kick-off.

CADENCE

Proposed meeting cadence.

Weekly review

[DAY TBD] · 1 HOUR

- Build progress · live demos
- Blockers identified · decisions required
- KPI review · scope adjustments
- Participants: Sofia + Lea + FDE (+ sponsors if needed)

Ad hoc sessions

ON REQUEST · 30 MIN

- Technical blocker unresolved after 24 h
- Urgent decision outside the weekly slot
- Scope change request
- Participants: depending on the topic

Sponsor review

W3 · W6 · W9 · W12

- Interim progress checks
- Pre go-live demo
- POC wrap-up · results vs. objectives
- Participants: Camille · Julien · Sofia · Alex · Lea

WEEKLY REVIEW FORMAT →

Live demo · no slides · status board updated by Sofia before each meeting · notes within 24 h.

COMMUNICATION

Channel, escalation and decisions.

COMMUNICATION CHANNELS

- 01 Shared project space**
Main day to day channel: questions, demo sharing, blocker tracking.
- 02 Email**
Formal decisions · meeting notes · contractual documents.
- 03 WhatsApp / direct call**
Emergencies only (critical blocker impacting go-live).

ESCALATION PROCESS

N1 OPERATIONAL	Sofia Renard ↔ Marc Dubois (FDE)	4 h
N2 SCOPE / TIMELINE	Sofia Renard ↔ Lea Fontaine (Nexus PM)	Ad hoc meeting
N3 STRATEGIC	Sponsors ↔ Nexus Executive Sponsor	48 h max

RULE Any blocker unresolved after 48 h automatically escalates to the next level.

RESPONSE RULE → Reply within 4 business hours on the project channel. Decisions recorded in writing.

IMMEDIATE ACTIONS

What happens starting tomorrow.

ACTION	OWNER	DEADLINE	STATUS
Name the IT owners (HRIS, ticketing, security, knowledge)	Sofia Renard	W1	PRIORITY #1
Open ATS and ticketing access (sandbox)	Thomas Lefebvre	W1	ASAP
Confirm the HRIS write scope with the vendor	Amina Diallo	W2	ASAP
Share last quarter's workload data	Sofia Renard	W2	TO DO
Validate the legal basis and DPA with the DPO	Julien Marchand	W3	TO DO
Schedule the mid-point sponsor review	Lea Fontaine	W3	TO SCHEDULE

FIRST WEEKLY REVIEW → Monday, March 16, 2026 · 11:00

TAKEAWAYS

Next meeting : weekly review, Monday March 16.

THREE THINGS TONIGHT

- 01 Share the list of access to provision
- 02 Name the IT owners on the Northwind side
- 03 Block the weekly review slots

SUCCESS IN 12 WEEKS

- ✓ Manual processing time cut in half across both workflows
- ✓ Zero system writes without human validation
- ✓ Two workflows in production, adopted by the teams

CONTACT

Lea Fontaine

hello@nexus.ai
nexus.ai/demo