

# Transform Onboarding and Lifecycle Management into a Growth Engine



"Setuply has delivered incredible value and efficiency, transforming the way we work."

**Coray Grove**  
Chief Revenue Officer, Inova Payroll

Create seamless client experiences that accelerate revenue recognition and maximize client value.

Setuply is an AI-powered, purpose-built platform for client onboarding and lifecycle management designed to accelerate revenue recognition for B2B solution providers.

Empower your team to fast-track client value, win more deals, scale faster, and maximize outcomes—all without increasing your operating footprint. Enable clients to take an active role in their journey so your business can focus on profitability and growth.



Dealing with *even one* of these challenges can negatively impact your company's growth:



#### Budget, Scope, and Timeline Overruns

Delays and cost overruns drain resources, frustrate clients, and result in non-starters.



#### Struggling to Engage Clients

Keeping clients aligned and responsive slows progress and jeopardizes outcomes.



#### Disconnected Single-Point Tools

Multiple systems create inefficiencies, miscommunication, and wasted effort.



#### Lack of Project Visibility

Limited clarity on project status and next steps leaves teams and stakeholders out of sync.

**Setuply empowers you to focus on what truly matters**—building stronger relationships, tackling critical challenges, and driving transformative outcomes.

Setuply clears the way for success, keeping you ahead at every turn.

Imagine the impact on your business with this game-changing toolkit from Setuply:



#### Streamline Data Management

Eliminate inefficiencies and errors, gather, validate, and transform client data with ease.



#### Engage and Empower Clients

Transform relationships with collaborative tools and intuitive portals that keep clients engaged, aligned, and accountable.



#### Get Real-Time Insights On Every Level

Gain clarity with tailored dashboards and unlimited reports to track progress, uncover opportunities, and ensure no value is lost.



#### Focus on Growth

Harness AI and scalable automation with built-in tools for project management, case management, forms, invoicing, and professional services automation.



#### Deliver Connected Experiences

Drive seamless client journeys with flawless integrations to your Sales CRMs and key tools for smooth collaboration and results.



**Request a Demo Today**  
[www.setuply.com/start](http://www.setuply.com/start)