



FullCircle

Making life easier

FullCircle research: Mateína

Why we invest in every customer audit

At FullCircle, we believe the best customer experiences are built by understanding them firsthand– not from dashboards alone.

Before making any recommendations, our team invests time becoming a real customer of yours. We place orders with you using our own funds, look into your complete purchasing journey, interact with your support, intentionally test AI experiences, and make detailed notes– all for you.

This takes a huge amount of time, effort, and often, money on our end. We are the only partner to take this approach. We do this to understand the friction and pain points your team describes during our conversations. We invest proactively in each team who comes in contact with FullCircle as a proactive sign of goodwill.

Everything below reflects a real customer journey completed by our team. The findings are intended to complement– not replace– the context your team shares with us, so please come ready to have a lively discussion with us.

What FullCircle did for Mateína in this audit:

To better understand the customer experience firsthand, we:

1. Completed a real purchase using our own funds
2. Looked into the pre-purchase, checkout, and post-purchase journey
3. Tested subscriptions, order management, and self-service experiences
4. Identified Mateína's current tech stack
5. Interacted with customer support using real customer scenarios
6. Interacted with all Mateína AIs to understand Mateína team's comments
7. Reviewed emails, tracking, and customer communications
8. Identified opportunities to Make Life Easier for Mateína's team & customers

Recap of chat #1 with Mateína's team

Through our first chat, these priorities were highlighted by the Mateína team, which we paid special attention to, during our independent audit work following this conversation.

Longer support times

Your team shared that customer response times can occasionally extend over weekends or whenever the primary support representative is unavailable, often stretching beyond 3+ days in response time. As the business continues growing, reducing dependency on one-two people, while maintaining the same customer experience appears to be an important goal.

Lower self-service levels, especially for subscriptions

Another recurring theme was helping customers solve more requests themselves rather than needing to contact support, especially for common actions such as subscription changes, and order management.

AI answers accuracy

Your team also shared that significant effort has already gone into refining Gorgias AI. While answer quality has improved over time, reliability, tone, and factual accuracy remain areas where you would like customers to have greater confidence.

Revenue growth without increasing costs

As Mateína continues growing, another theme we heard was enabling the business to scale revenue and customer experience without proportionally increasing support costs or advertising spend.

Deep research conducted independently

During the audit, we walked through every step of a customer's journey with Mateína, and were able to find these tech tools deployed by Mateína's team so far

- Gorgias as the CX helpdesk, Gorgias chatbot, and Gorgias automated email AI replies
- Recharge for powering subscriptions, and subscription management portal
- Shopify
- Klaviyo for marketing and communications with the customer
- Corso
- Social Snowball
- and others!

We made purchases on Mateína's website- & walked the full customer journey ourselves!

After our conversations, we went to experience Mateína exactly as one of your customers would, to get a deeper insight into what you mentioned during our first chat.

Rather than reviewing dashboards or relying on assumptions, we became customers ourselves. We researched the Mateína brand online, mapped the current technology stack, completed a real purchase using our own funds, tested the experience before and after checkout, interacted with customer support, explored subscription management, reviewed customer communications, and intentionally chatted with the Gorgias AI assistants across a variety of real-world customer scenarios.

Along the way, we looked for the same opportunities your team mentioned during our conversations- places where customers still need to contact support, where AI could create more confidence, and where the overall journey could become even more seamless.

Below is a walkthrough of our experience, including observations from each stage of the Mateína customer journey.

Pre-checkout experience

Protecting the exclusivity of discount codes

1. Before purchasing, we researched Mateína online much like a first-time customer would. During that process, we were able to find a community-exclusive discount code ("MATEFAM") by searching Google (screenshot). While this helped us save on our purchase, it also highlighted an opportunity to preserve exclusive offers.

AI Overview

You can currently save **20%** on your entire Mateina order online using the promo code **MATEFAM** or **6AMCLUB20** at checkout. Alternatively, if you are a first-time buyer looking to try their lineup, you can grab the **Zero Sugar Yerba Mate Sampler Pack** which includes free shipping.

If you want, tell me:



1

Delivery & Satisfaction Guarantee
\$1.99

GSP-199
60-Day Subscription
[Remove](#)



1

Lemon Original
~~\$39.00~~

60-Day Subscription
 **STACK & SAVE (2JSZP-0)** (-\$2.73)
 \$36.27

 **MATEFAM** 

Subtotal · 2 items

\$38.26

Order discount

 **MATEFAM**
– \$5.44

Shipping ?

Enter shipping address

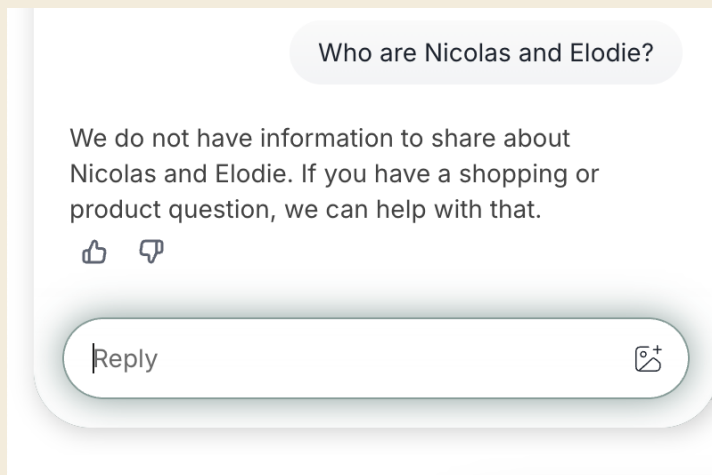
Total

USD **\$32.82**

 **TOTAL SAVINGS \$8.17**

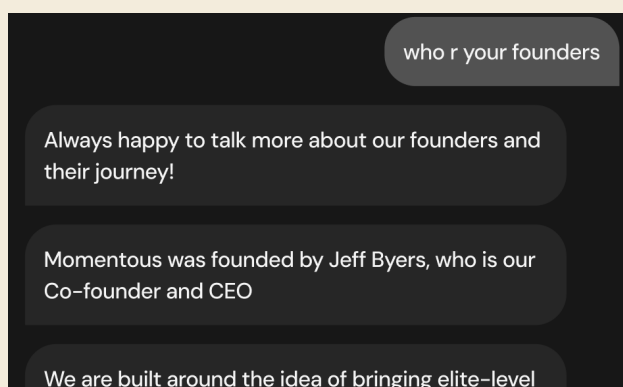
This order has a recurring charge for multiple items.

2. We also had to google most questions about Mateína vs. using the Gorgias AI chatbot. For example, the Gorgias AI chatbot did not seem to have any information about the founders of Mateína, even after asking the question a few different ways, so we had to go to google for these answers, where customers are likely to also be recommended Mateína's competitors. We now understand your frustration with Gorgias AI even better.



Insight: Every unanswered customer question can lose the attention you've worked hard to capture. Once customers get lost in searching for an answer, they're often introduced to competitors, extra info, and alternative products at the exact moment they may be trying to make a purchase decision. Source: Mckinsey survey 2026

FullCircle before-and-after: Unlike other AI companies, FullCircle is able to answer questions about your company with information available across your website– not just your helpdesk articles– accurately, every single time. This prevents your customers from having to go elsewhere for answers. Where you control the turf!



Screenshot from: FullCircle CX Agentic portal

Pro tips:

1. Tone & reply cadence used by FullCircle are customizable.
2. FullCircle offers pre-made templates so that you don't have to write tone-prompts from scratch. Unlike other AI companies who may leave you alone with setup, we complete your setup with you
3. Unlike other AI companies, FullCircle automatically picks up any edits on your website, so you never have to manually update your AI
4. Unlike other AI companies, even with half written sentences, FullCircle AI is fast, accurate, and well-informed. A FullCircle screenshot of this exact query, from a brand similar to yours in some ways, below.

Checkout experience

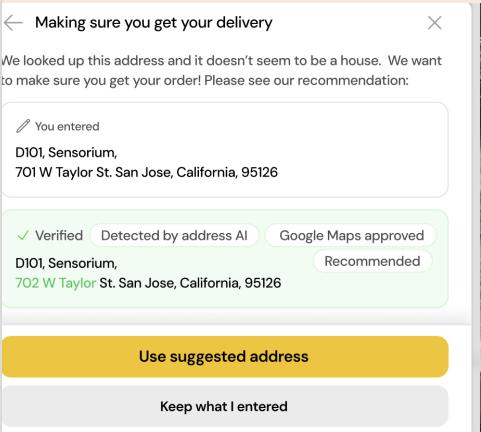
The checkout experience with Mateína was quite straightforward. We were reminded of the moments of friction you mentioned during our chat, since we also experienced them. We can understand now, more deeply, what your needs are. Our full highlights below:

1. One moment of friction occurred during address validation, where selecting our address was not showing up as an option. Our address is 21 Stuyvesant St, Manhattan, NY, NY, 10003, which did not show up even on multiple attempts:

The screenshot displays a checkout interface. On the left, an address input field contains '21 stuyvesant st'. Below it, a 'SUGGESTIONS' dropdown lists five addresses, all starting with '21 Stuyvesant St' followed by different locations and zip codes. The fourth suggestion, '21 Stuyvesant St, Huntington NY 11743, United States', is highlighted with a dark green background. To the right of the address field is a magnifying glass icon. On the far right, there's a '60-Day Subscription' section with a 'Remove' link. Below that is a 'Lemon Original' product card with a '60-Day Subscription' and a 'STACK & SAVE (2JSZP-)' tag. Further down is a 'Discount code or gift card' input field. At the bottom right, there's a 'MATEFAM' loyalty card icon. The bottom of the page shows a 'Subtotal · 2 items' and an 'Order discount' section with a 'MATEFAM' tag.

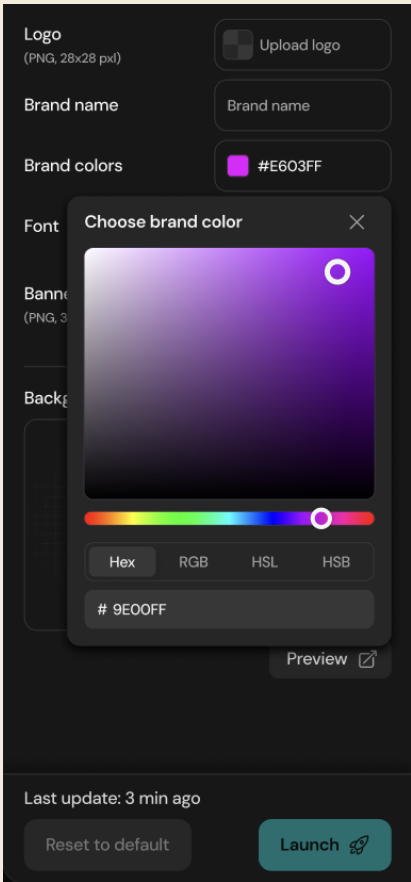
Insight: Address entry issues are one of the highest-friction moments in ecommerce checkout. Industry studies estimate that **17–32% of checkout errors** are related to address validation & entry mistakes: leading to abandoned carts, revenue lost to failed deliveries, or avoidable customer support requests. Source: Mckinsey survey 2026

FullCircle before-and-after: Unlike other AI companies, FullCircle’s advanced Address AI could kick in here for Mateína at no additional cost, which would meaningfully grow Mateína’s revenue and slash address-issue related customer tickets– without any extra effort for your team. A live screenshot from a FullCircle customer is attached for your reference below, to show you how this would help your customer, in real time!



Screenshot from: FullCircle Order Management product

Pro tip: Colors and language used by FullCircle are customizable

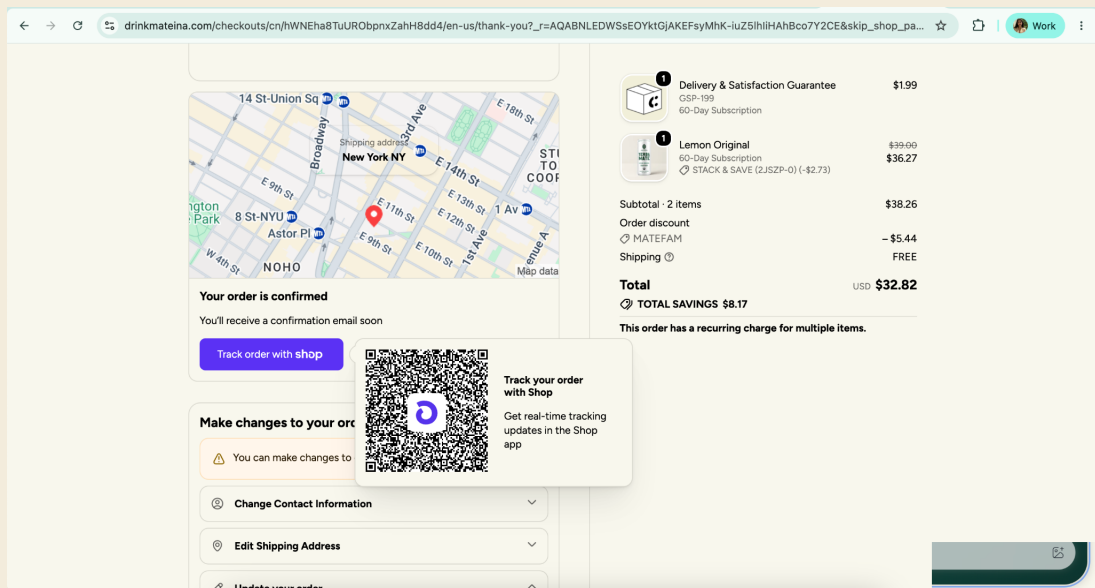


Screenshot from: FullCircle customization dashboard

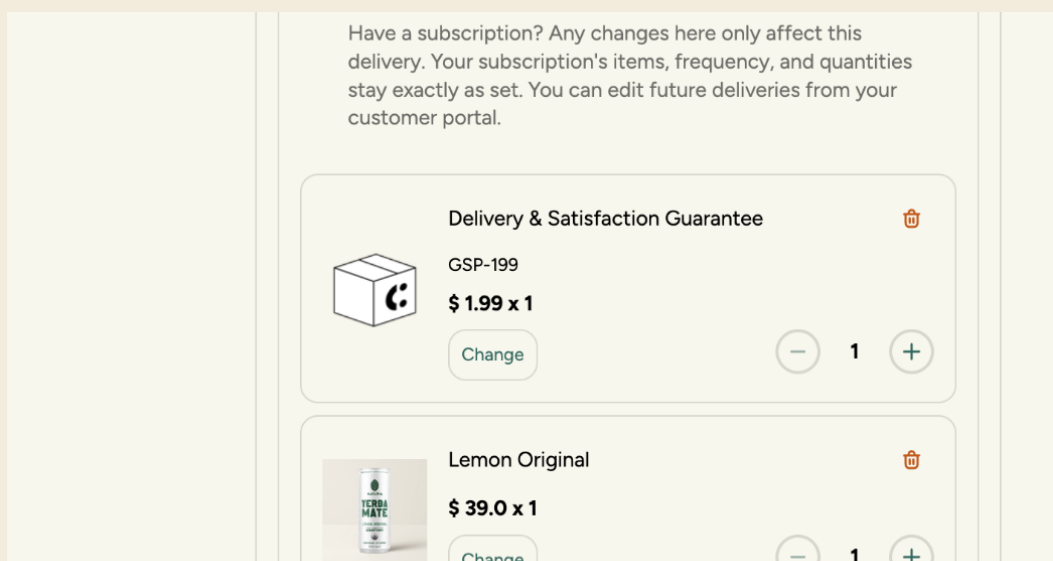
Post-checkout experience

Observations

1. Immediately after placing our order, we wanted to track our shipment. Rather than viewing tracking directly within the Mateína experience, Shopify prompted all customers like us to download their own app to track the order.



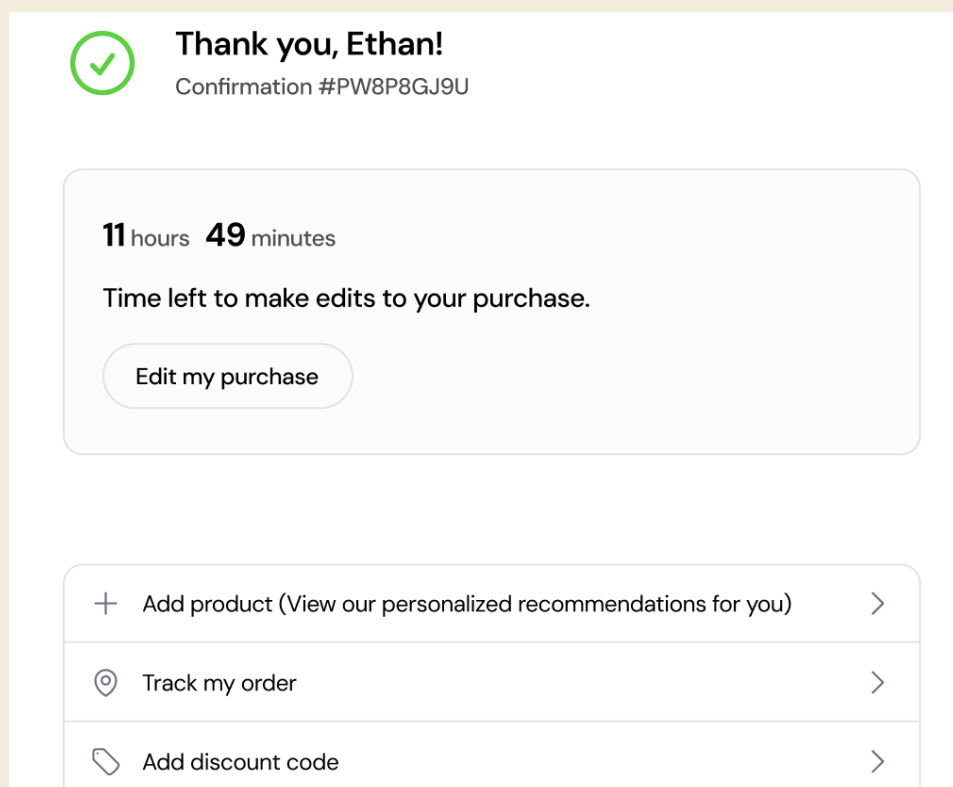
2. Although a subscription edit option was very visible as a button after checkout, changes couldn't be made to subscriptions from there (screenshot). Customers would instead need to locate a separate subscription portal, which wasn't immediately obvious and was difficult to find as customers:



Insight

1. 36% of ecommerce revenue comes from immediate post-purchase upsells. Top brands are earning anywhere from 7,000–19,000 USD per month with FullCircle by simply using FullCircle’s personalized upsells AI during checkout.
2. Every extra click after checkout increases drop-off. Third-party apps also expose customers to competing brands.
3. Subscription changes are among the largest drivers of post-purchase support tickets in brands today. Easy self-service reduces tickets while improving the customer experience. Source: Mckinsey survey 2026

FullCircle before-and-after: Instead of redirecting customers to download a separate app, FullCircle can keep the entire post-purchase experience inside the Mateína brand, avoid shopify app downloads for order tracking, and increase Mateína upsell revenue without any additional ad spend. Customers can track their order, make subscription changes, buy more- without any friction.



Screenshot from: FullCircle Order Management product

Review of all current AI experiences

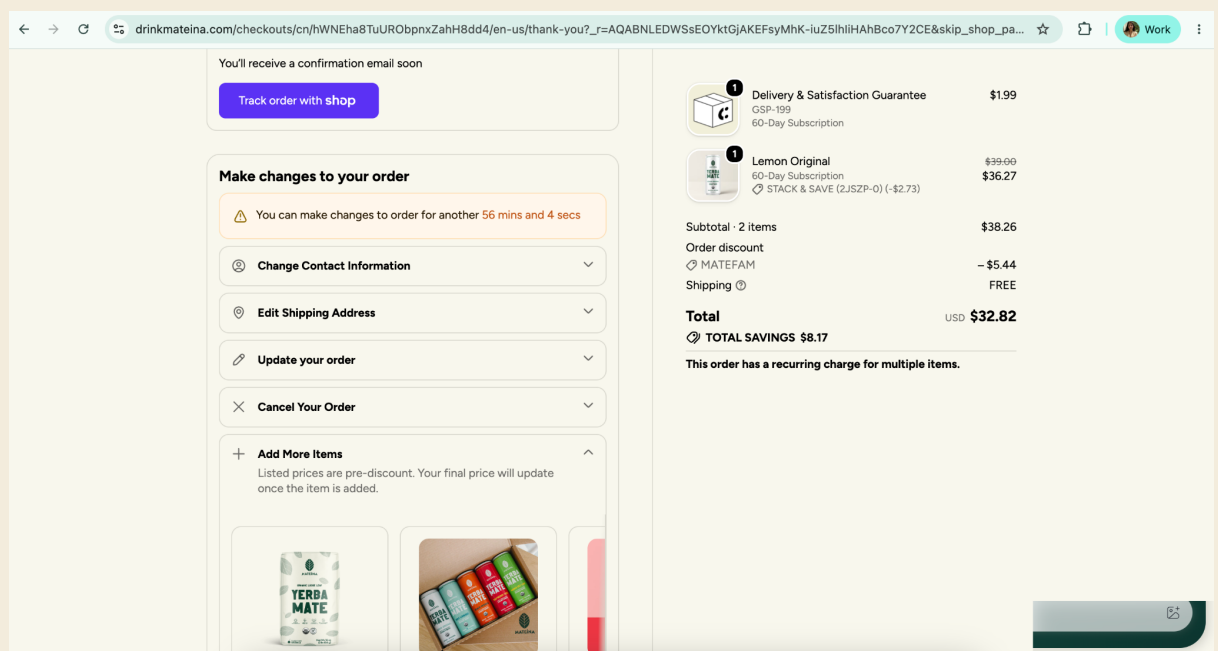
After completing our purchase, we wanted to better understand your pain points and the AI challenges your team shared during our conversations. We headed over to the Gorgias chatbot, email, and all AI experiences and intentionally tested those across a variety of real customer scenarios. We now more deeply understand the pain you were describing. What we observed during testing aligned remarkably closely with the pain points your team has already identified!

Observations

We evaluated the current AI experience across four customer touchpoints: Mateína's post-purchase AI, the website AI, chat AI, and email AI. Here is the customer journey with AI from each of these touchpoints:

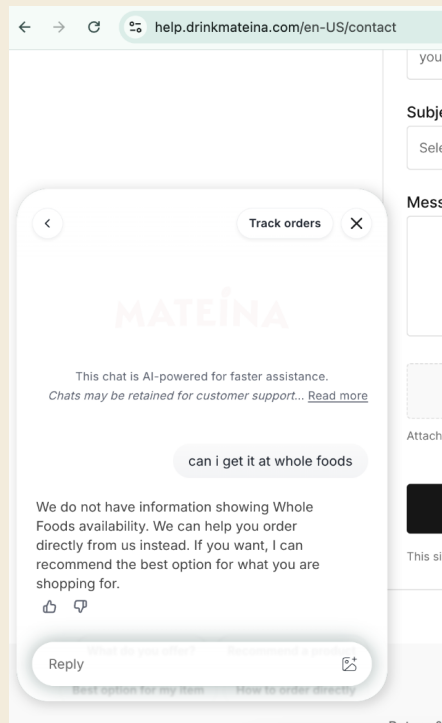
1. Post-purchase AI crashed:

During post-purchase the Gorgias chatbot crashed. Experiencing this firsthand helped us better understand the frustration with your current AI that your team shared during our conversations:

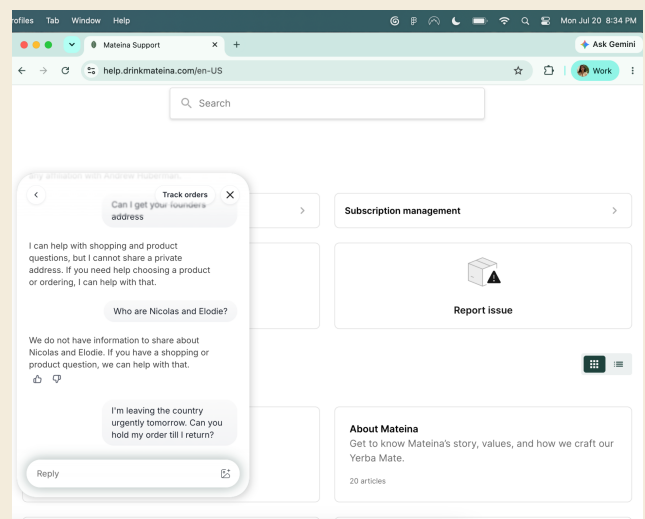
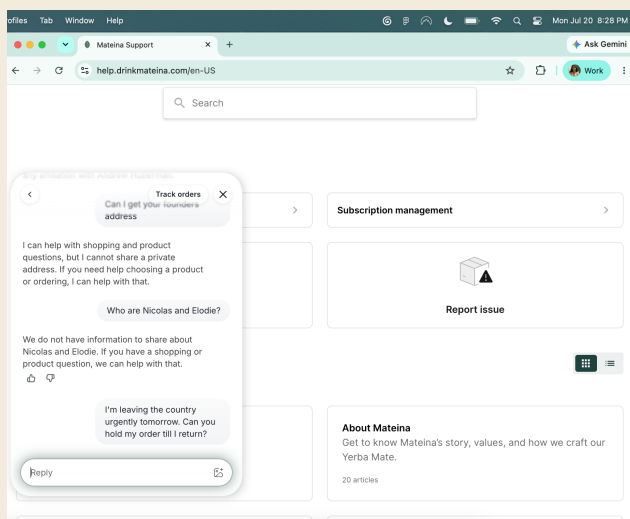


2. Website AI & Chat AI experiences:

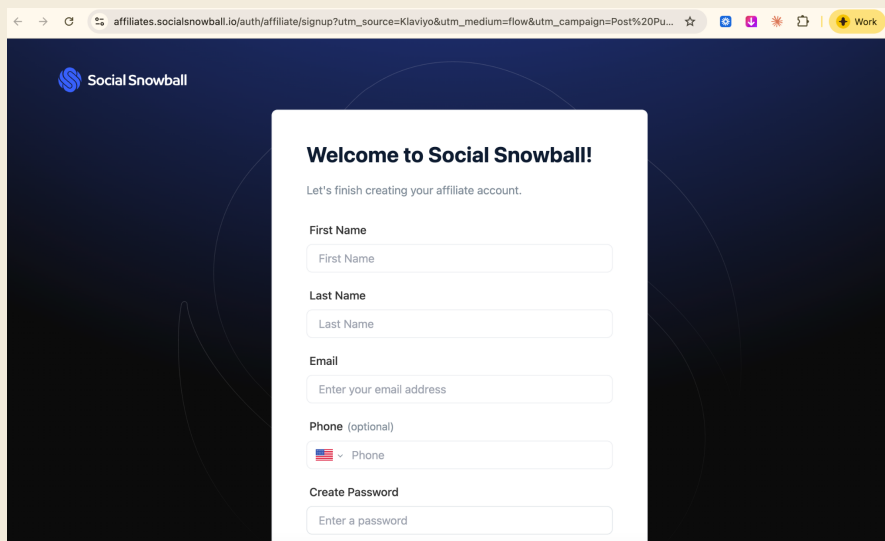
- When we asked about Whole Foods, the chatbot AI hallucinated. Experiencing this firsthand helped us better understand the reliability and hallucination concerns your team shared during our conversations. Here is one example out of the many other hallucinations we were able to validate on our own.



- We know how much work goes into earning placement in Whole Foods and how prominently Whole foods is featured across the Mateína experience. Seeing the AI struggle with this question helped us understand your frustration with your AI firsthand.
- Additionally, the Gorgias chatbot crashed a few more times, which further explained your team's frustration. We empathize with the pain you are experiencing with your current AI. 2 screenshots of crash below (please see timestamps)

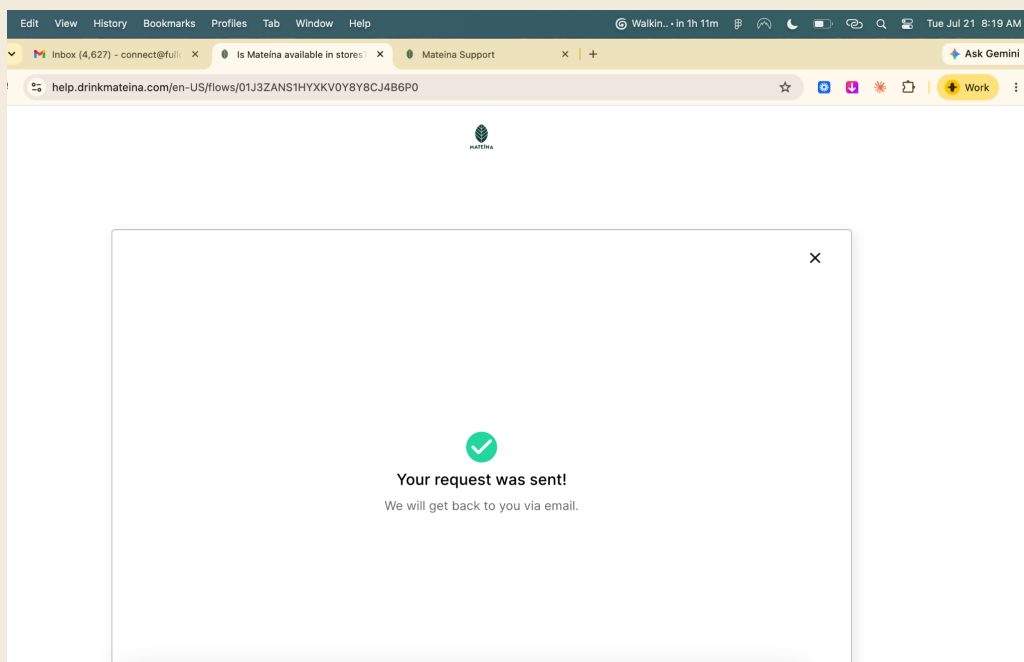


- The Gorgias AI assistant was unable to assist with subscription management requests, and often makes up what subscription edit capabilities are available: as highlighted by your team during our chat as well, verified by us as well now
- Customers are directed across multiple portals depending on what they need, making the support journey difficult to navigate. It was often unclear which portal or experience customers should use for common post-purchase tasks. Unification of this will lead to lower support tickets:



A screenshot of a web browser showing the Social Snowball affiliate sign-up page. The URL in the address bar is `affiliates.socialsnowball.io/auth/affiliate/signup?utm_source=Klaviyo&utm_medium=flow&utm_campaign=Post%20Pu...`. The page has a dark blue background with a white sign-up form in the center. The form is titled "Welcome to Social Snowball!" and includes the instruction "Let's finish creating your affiliate account." The form fields are: "First Name" (placeholder: First Name), "Last Name" (placeholder: Last Name), "Email" (placeholder: Enter your email address), "Phone (optional)" (placeholder: Phone, with a US flag icon), and "Create Password" (placeholder: Enter a password).

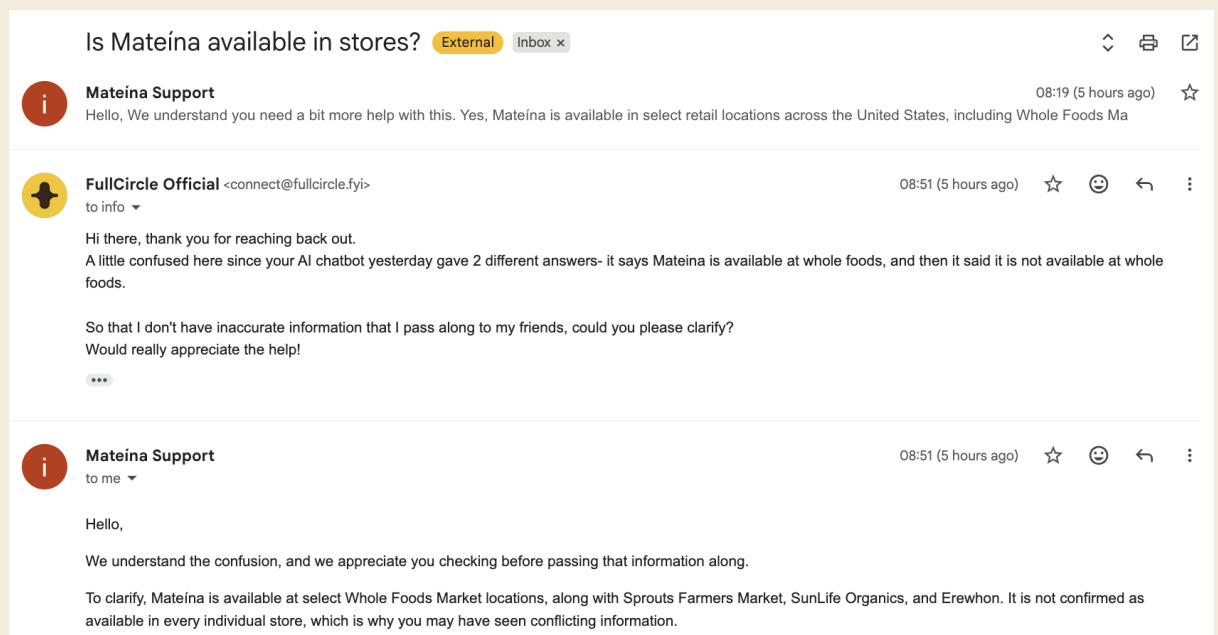
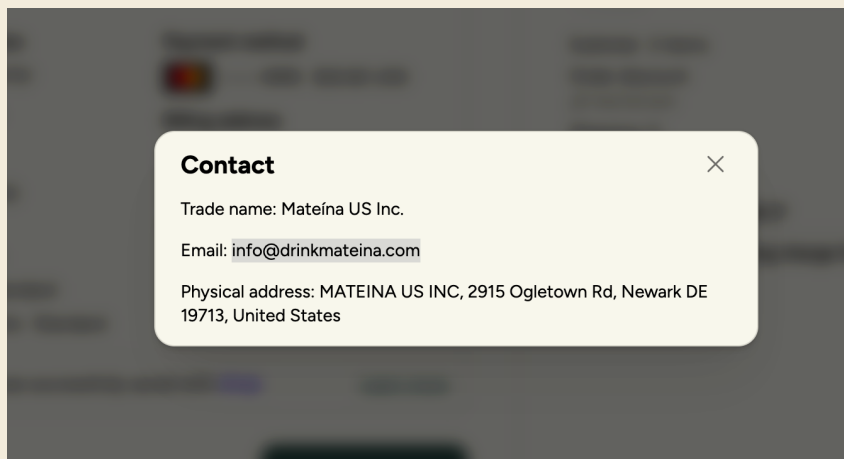
- Contact information could not be updated after the first 60 minute window expired, leaving no clear fast self-service path:



3. Email AI experience:

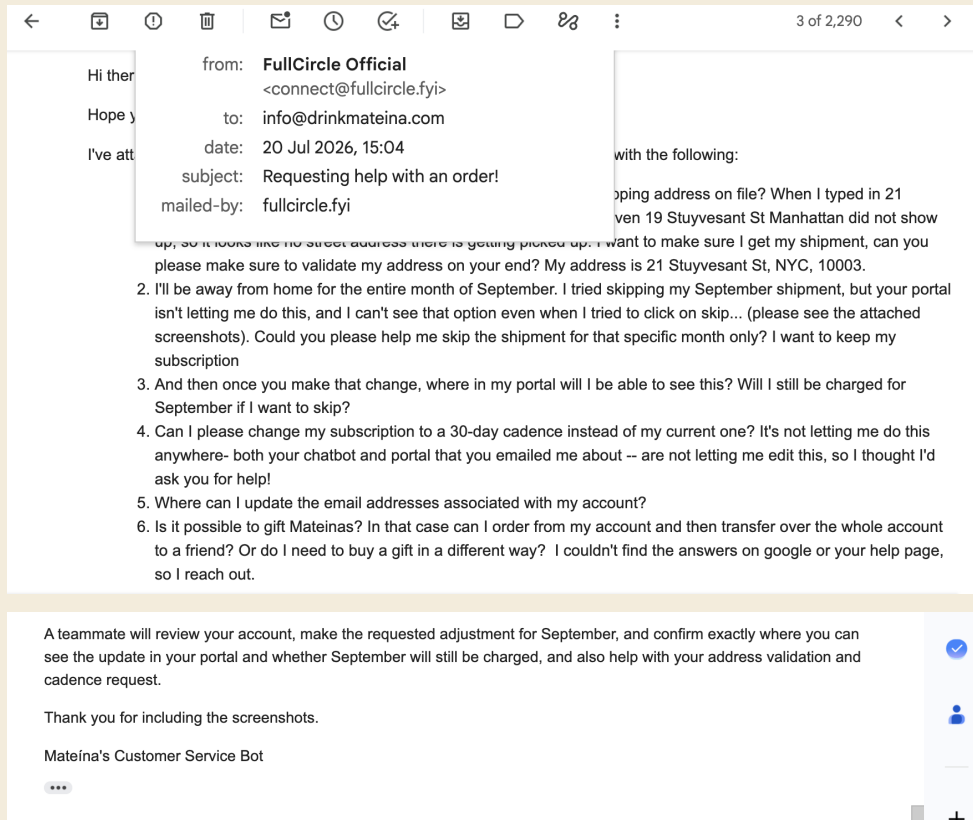
We also contacted the Mateína support team over email with a mix of lightweight emails and more complex emails. Below are the timestamps, followed by a few observations from the experience. Key observations from the email AI experience below:

- Lightweight emails got replies very fast. Accuracy of responses varied. The email AI replies were more balanced than the chat AI!



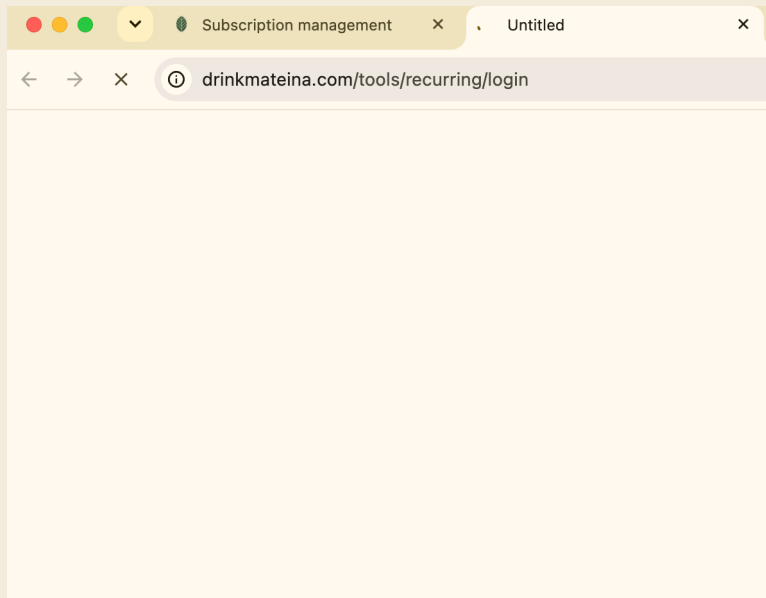
- Several of our more complex support requests remained unanswered, other than the automated bulk replies sent out by AI, which did not solve our problem. Experiencing this firsthand helped us understand why reducing response times and enabling more subscription edits were such important priorities during our conversations.

All screenshots for each bullet point laid out clearly below:

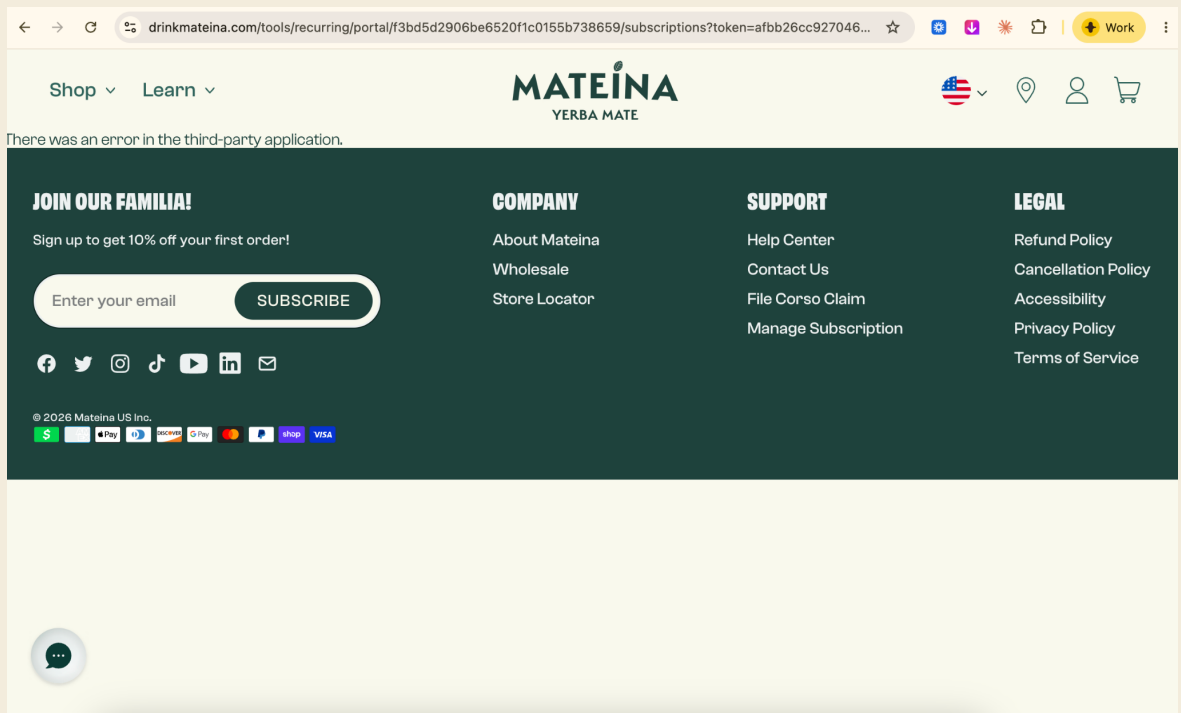


4. Subscription Management Portal:

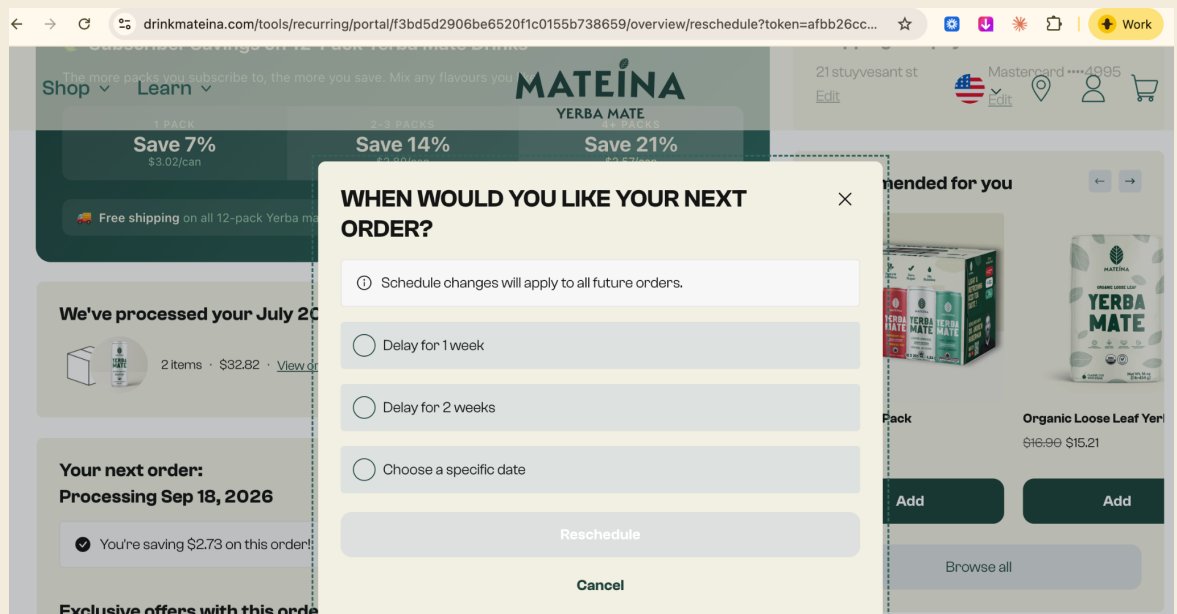
- The Recharge portal for Mateína did not load over 2 days, leaving customers like us lost about where to edit subscriptions:



- The Recharge portal crashed a few times, preventing subscription changes from being completed. (screenshots)



- The Recharge portal did not allow for change of frequency of subscriptions from 90 days to 30 days, which may be preventing revenue growth that is easy to attain



Insight

1. Nearly 60% of customers prefer using fewer touchpoints to complete a task, while 69% expect consistent interactions across every department and channel.
2. Customers do not see website AI, chat AI, email AI and post-purchase AI as separate tools. They expect every interaction to understand the same products, policies, orders, subscriptions and previous conversations.
3. When AI gives inconsistent answers, loses context, becomes unavailable or fails to resolve the underlying request, it increases customer effort and creates additional support tickets instead of reducing them. Source: McKinsey survey 2026

FullCircle before-and-after: Instead of operating disconnected AI experiences across Mateína's website, chat, email and post-purchase journey, FullCircle can create one connected AI experience grounded in Mateína's approved business knowledge and customer data. Customers can receive consistent answers, complete eligible order or subscription requests, and move to the right workflow or human expert without repeating themselves, reducing support demand while improving trust in every interaction with the Mateína brand.

Conclusion

After experiencing the customer journey as customers ourselves, we came away with a deeper appreciation for the opportunities your team shared during our conversations. Many of the patterns we observed independently align exactly with the challenges you've identified yourself.

The encouraging part is that many of these opportunities can be addressed without too much effort. Below is a summary of quick wins for you:

Quick wins available for Mateína:

Quick wins in Customer Experience

1. **True Self-Service:** Enable customers to independently manage pre and post purchase requests without any fuss or distractions
2. **Accurate AI Answers:** Provide reliable answers to high impact customer questions without hallucinations.
3. **24/7 Customer Coverage:** Continue serving customers even when the team is offline.
4. **One Unified Customer Hub:** Bring orders, subscriptions, AI, and support into a single view for your customer

Quick wins in Revenue & Growth

5. **Increase Post Purchase Revenue:** Drive an additional \$7,000–\$19,000+ per month, minimum, through personalized upsells, cross-sells, checkouts, and subscription edits.
6. **Address Validation AI:** Recover lost revenue from address errors with AI powered address validation without spending extra on any new AI products– all covered inside FullCircle AI
7. **Faster Support:** Reduce larger support requests from 3+ days to instant self-service or ~6 minute email replies with FullCircle Email AI.

Quick wins in robust AI

8. **Brand Voice Control:** Keep complete control of AI tone and customer replies without retraining any human agents.

9. **Low Effort AI Deployment:** Implement AI with little to no setup effort. Use templates where you don't want to start from scratch. Sit back and let the FullCircle team do the heavy lifting.
10. **No Ongoing AI Maintenance:** Simply update your website or policies. FullCircle automatically keeps the AI in sync, eliminating the need to manually update prompts or knowledge bases.

FullCircle Products: An overview

FullCircle offers a range of products that cover the entire customer journey, from pre-purchase through post-purchase, with the goal of: (1) preventing support tickets before they happen, (2) enabling delightful customer experiences, and (3) increasing revenue through personalized upsells, cross-sells, subscription expansion, & add to order opportunities.

- **AI Powered Chat Product:** Answers customer questions across your website while guiding shoppers toward the right products to increase growth without additional ad spend. Bringing subscriptions, order edits, and AI answers in one central hub.
- **FullCircle Order Editing Management Product:** Enables customers to update eligible orders and subscriptions in one place without even contacting support, immediately post-checkout
- **PDP Product AI:** Product specific AI that answers questions directly on product pages to increase purchase confidence and conversion.
- **Anywhere Links:** Bring your AI conversations into social media, emails, SMS, QR codes, and any other customer touchpoint with a single Anywhere-link unique to Mateína.
- **Personalized & Educational Emails Product:** Deliver AI powered educational content tailored to each customer's products, purchase history, and journey with you.
- **AI Powered SMS:** Engage with personalized SMS messages based on each customer's products, purchase history, lifecycle, and real time behavior.
- **FullCircle Human-AI Copilot:** AI assistant that helps CX agents draft replies, take approved actions, and resolve issues 20x faster- in a tone you can pre-approve & edit anytime.
- **FullCircle Email AI:** Responds simple and complex customer emails autonomously in under 6 minutes.
- **AI Powered Customer HQ Portal:** A modern self-service experience for subscriptions, orders, AI support, and account management that replaces the legacy Recharge customer portal.
- **Ask Your Dashboard:** Chat with customer support metrics, trends, operational insights, and AI generated recommendations using natural language.

Each FullCircle product is designed to work seamlessly with the others, allowing you to introduce new capabilities over time without creating disconnected customer experiences. Instead of stitching together multiple vendors, portals, AI tools, and customer touchpoints, your team owns one unified customer journey from pre-purchase through post purchase

Our Product Recommendation for Mateína

Based on the findings from this audit, your existing customer journey, and the size of your team, we'll come ready to recommend which FullCircle products we believe are worth evaluating first, along with the products we do **not** recommend at this stage. Our goal is to keep the evaluation focused on the areas we believe will create the greatest impact while avoiding unnecessary complexity.

How FullCircle is Different

FullCircle does the AI heavy lifting

Unlike other AI companies, FullCircle provides pre-built templates, completes setup with your team, automatically picks up changes to your website, and eliminates the need to manually maintain prompts or knowledge bases.

FullCircle grows revenue in non-sales-y ways

Unlike other AI companies, FullCircle creates new revenue opportunities through personalized product recommendations, intelligent cross-sells, upsells, subscription expansion, add to order opportunities, and other high engagement moments throughout the customer journey, all without increasing ad spend or relying on pushy sales tactics.

Pricing that rewards Prevention– Not More Tickets

Unlike other AI companies that charge based on ticket volume or AI resolutions, FullCircle is incentivized to reduce support requests through better self-service, more accurate AI, and a better customer experience.

Your FullCircle Journey so far & Next Steps

To keep your FullCircle journey process simple, we recommend progressing one step at a time.

Touchpoint 1: Introductions (15 min)

A brief overview of FullCircle, our approach, and an opportunity to answer any initial questions.

Touchpoint 2: Audit: Detailed discussion of your pain points (30 min)

A walkthrough of this audit, joint findings, which products we recommend for Mateína, as well as the products we do **not** recommend based on your current needs. We also discuss key stakeholders, and any questions top of mind for both teams.

Touchpoint 3: Product Walkthrough & commercials (35 min)

A detailed walkthrough of the recommended FullCircle products, how they fit into your existing customer journey, and dedicated time for operational and commercial items.

As each step is completed, the next 3 recommended steps are shared with your team.