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Automation System Rollout



We drive local economies

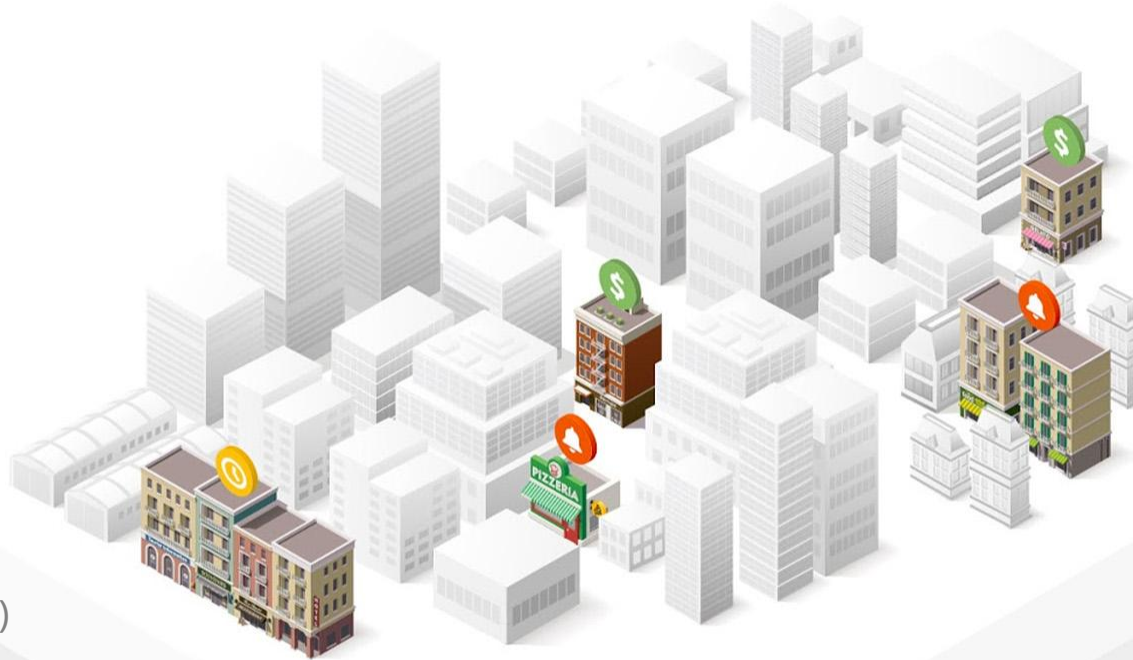


It's hard for small and medium businesses to operate online



Businesses rely on local experts for help, who then rely on us to scale

Vendasta provides local experts (**partners**) with marketing tools, 250+ products to sell, outsourcing services, task tracking, invoicing, business training, sales tools, ...



Omega Dental Clinic
 404 Maryland Plaza
 St Louis, MO 63108
 +1 940-483-8226
<http://www.omegadental.com/>
 Health & Medical > Dentists



Overall Score



Reputation Management

LAUNCH

Boostability SEO | Bronze

LAUNCH

Customer Voice

LAUNCH

Listing Builder

LAUNCH

Appointment Scheduling

LAUNCH

Website Pro

LAUNCH

Zenreach

LAUNCH

Pagevamp

LAUNCH

Custom Logo Design

INFO

StoryTap | Brand Boss

LAUNCH

Menu Sync

INFO

Social Marketing

LAUNCH

BUSINESS APP

Executive Report

Reputation Listings Social Website Advertising

Marketing Funnel

Impressions: 2,340 -132

Engagement: 819 +14

Leads: 312 -6

Review rating: 4.9

Review volume: 527

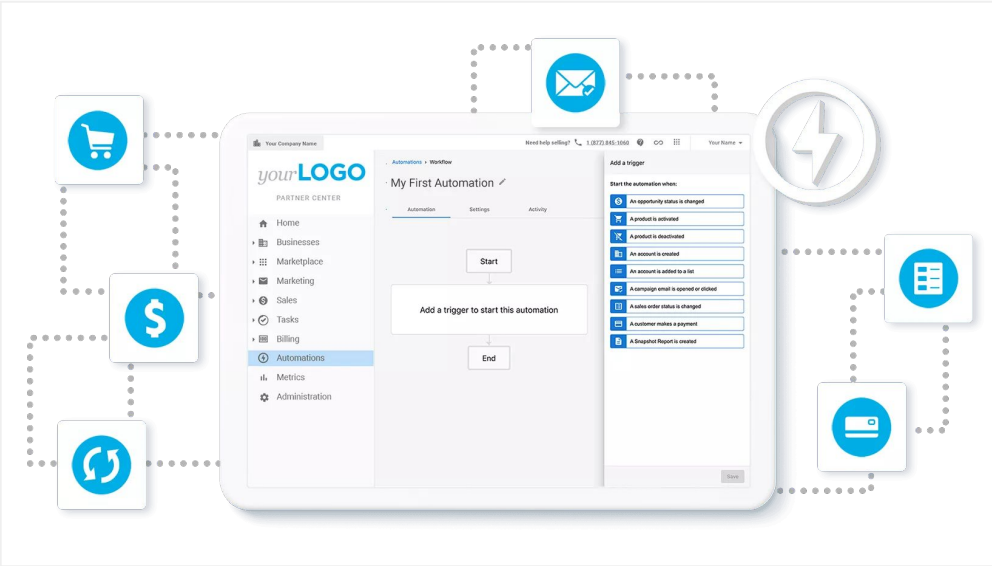
Insights: Services 25, Facility 11, Experts 5, Timing 4, Experience 2

Cart: Paintbrushes \$18.00, Pen \$6.00, Notebook \$20.00

Subtotal: \$50.00

Pay Now

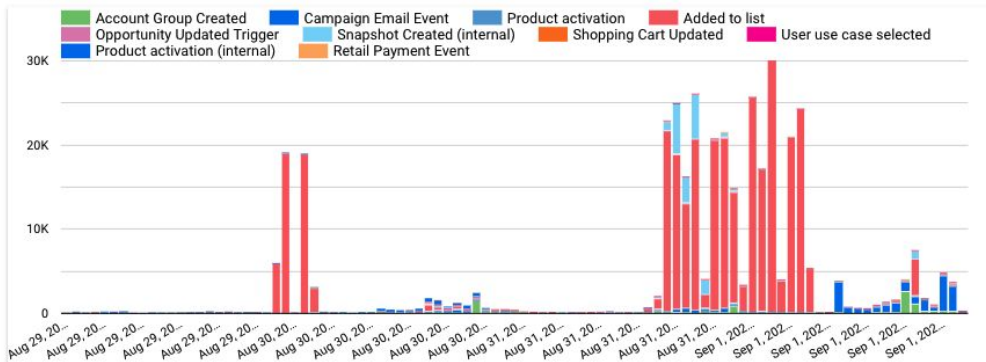
Automations glue our features together



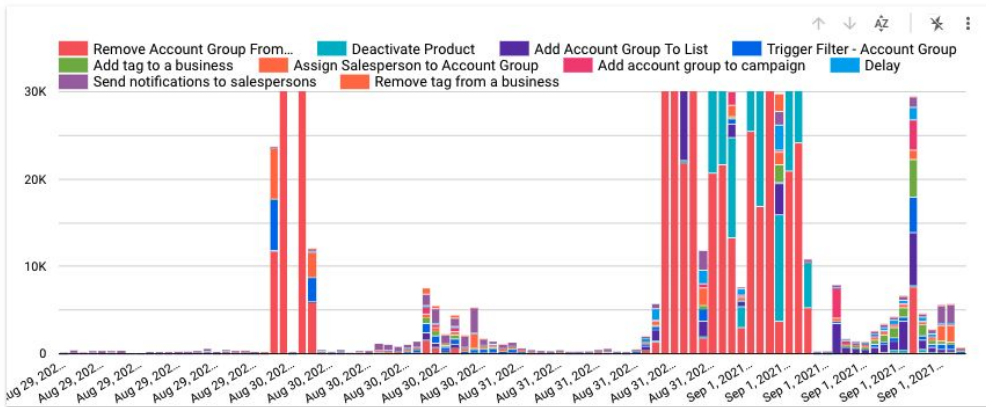
Automation systems are **high risk**

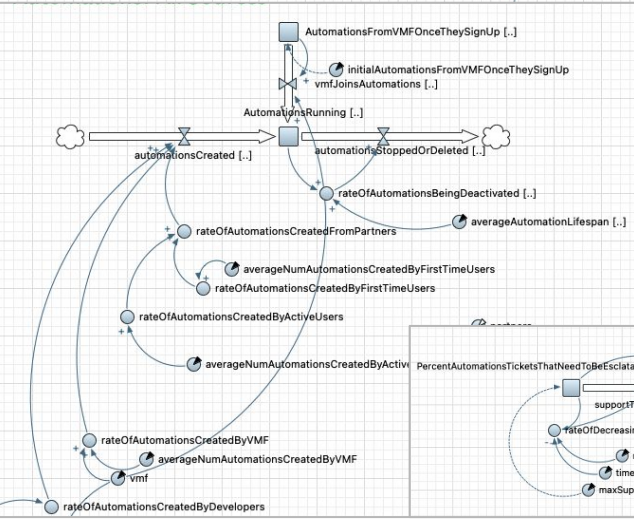
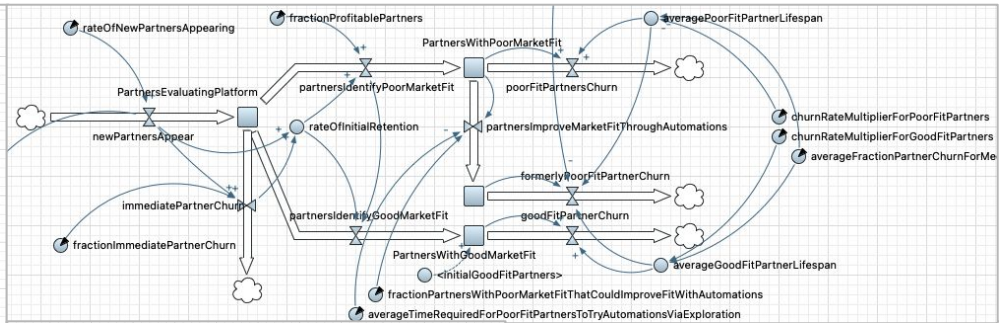
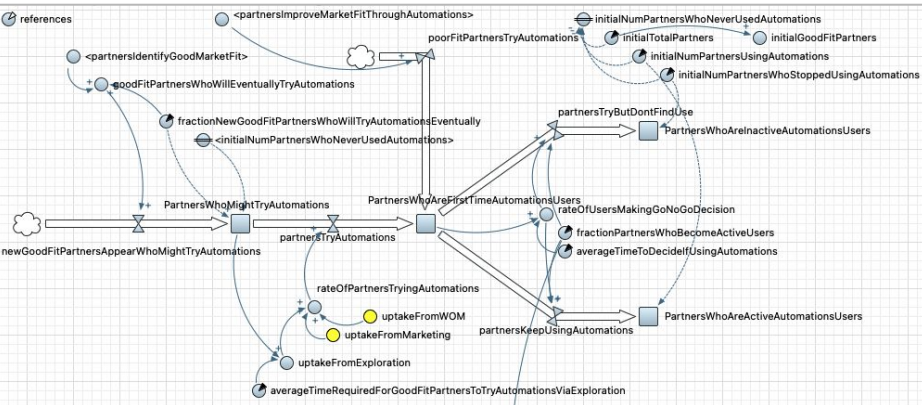
- How many users to expect?
- Internal vs external user?
- What if...
 - A million emails are sent at once?
 - Paid features are rapidly activated?
 - An automation causes a PR disaster?

Triggers Fired

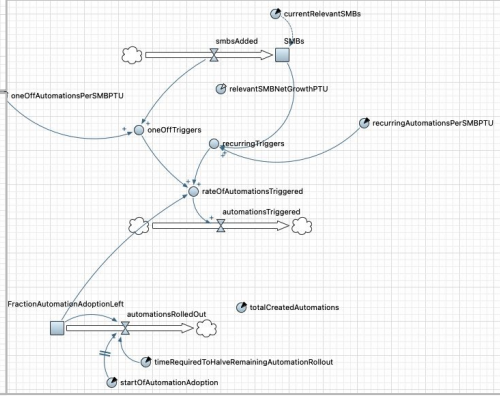
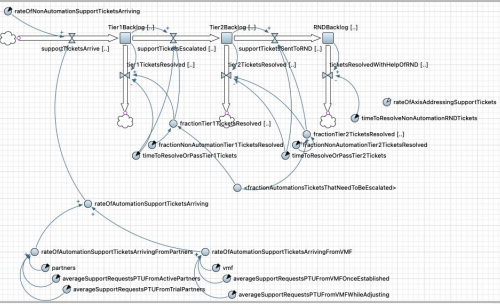
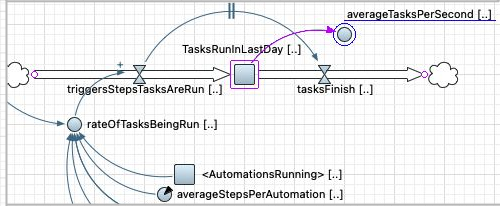
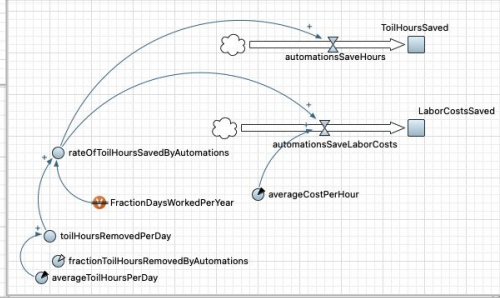
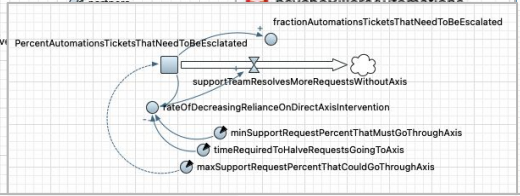


Steps Executed





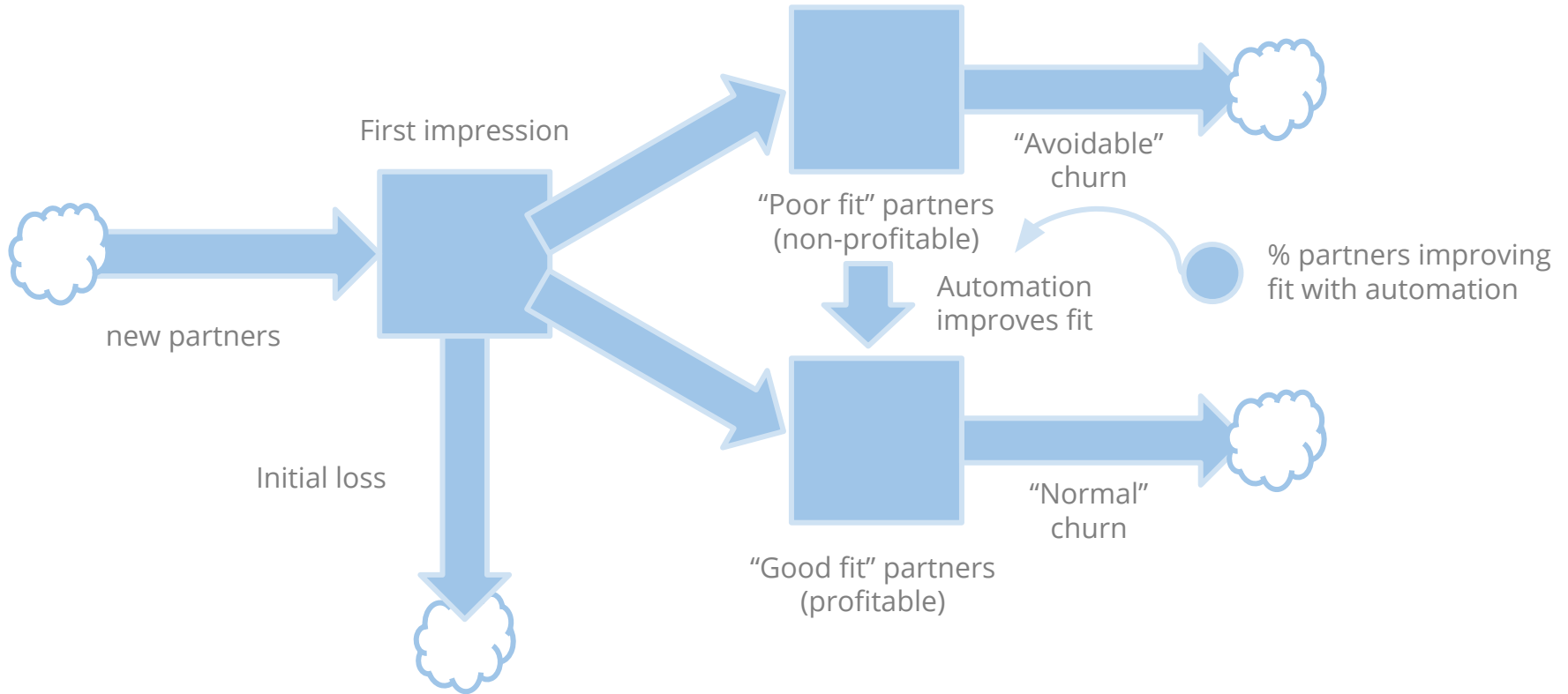
- ★ luckyCharmsAutomations
- ★ mitAutomations
- ★ npEasyAutomations
- ★ colPanicAutomations
- ★ liiBizAutomations
- ★ spokesbustersAutomations
- ★ totsAutomations
- ★ iNSyncSMBAutomations
- ★ scrummibearsAutomations
- ★ pioneersAutomations



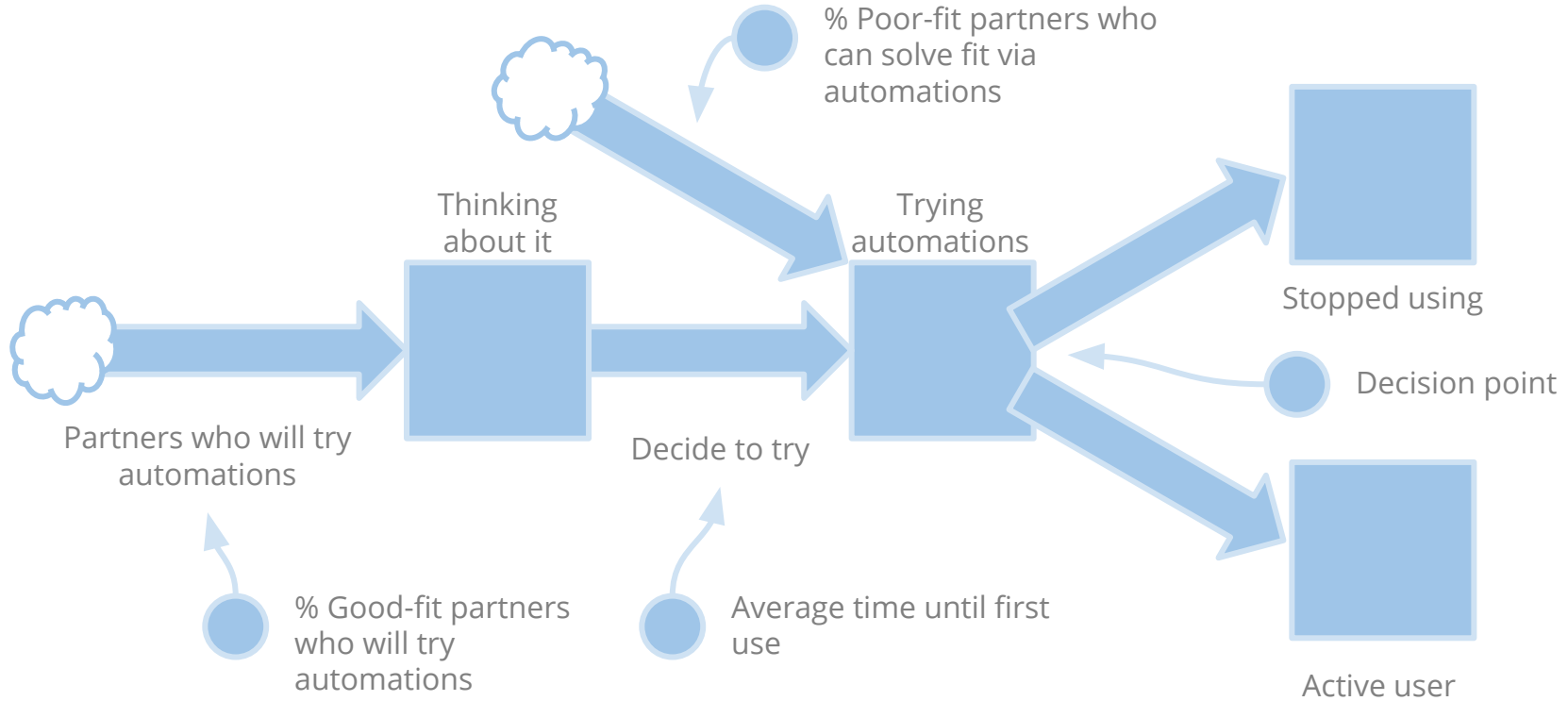
Design Philosophy

1. Something for everyone
2. Don't assume linear processes
3. Disaggregate carefully
4. Lean on evidence synthesis

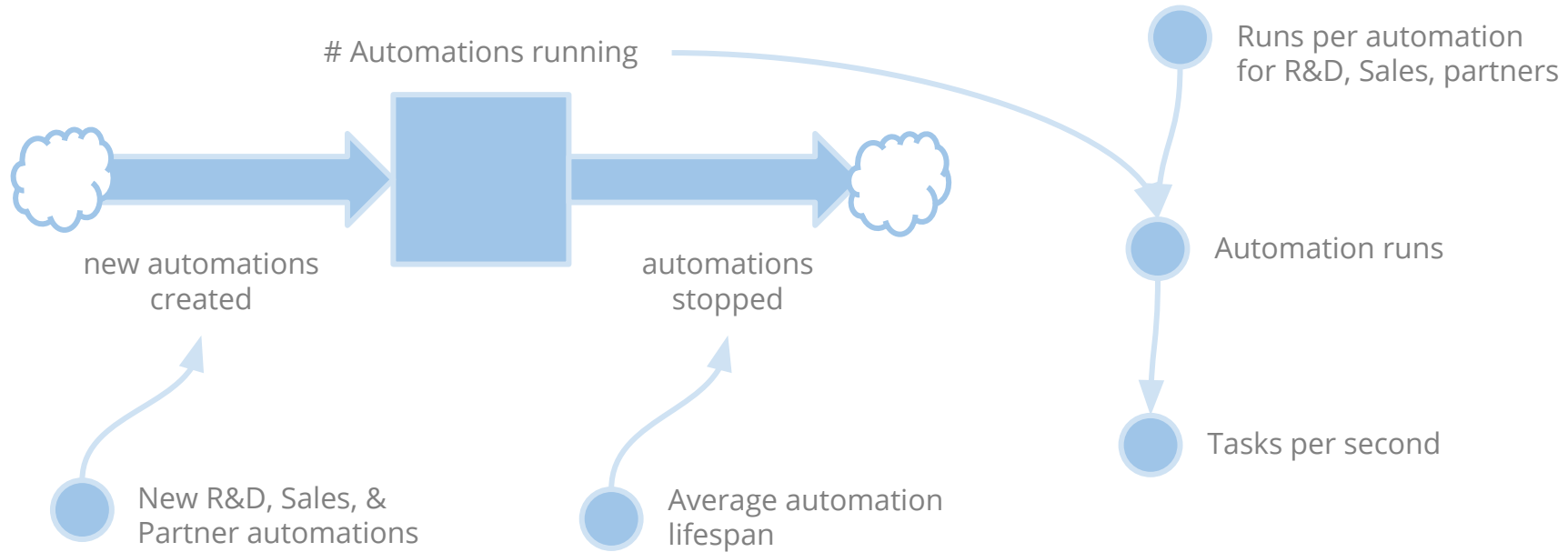
Partner Adoption & Retention



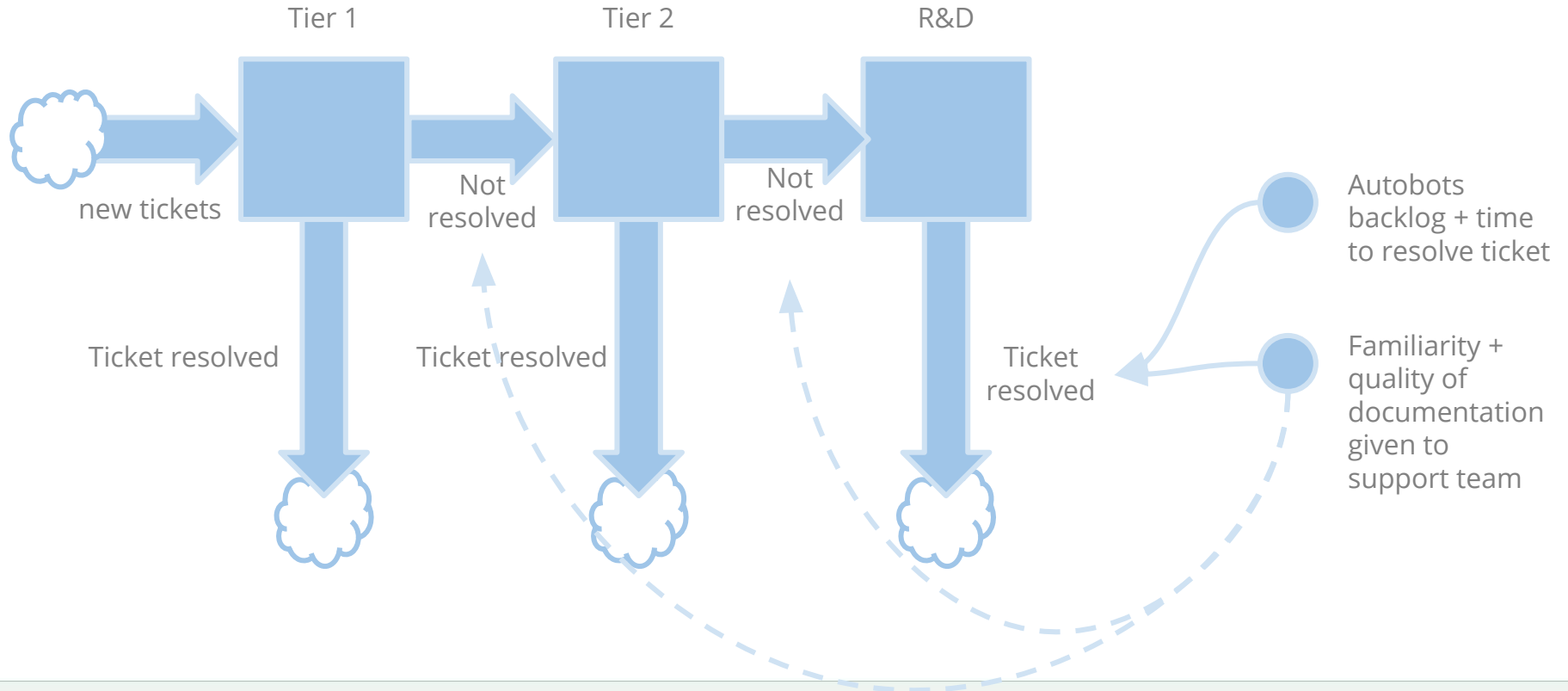
Feature Uptake



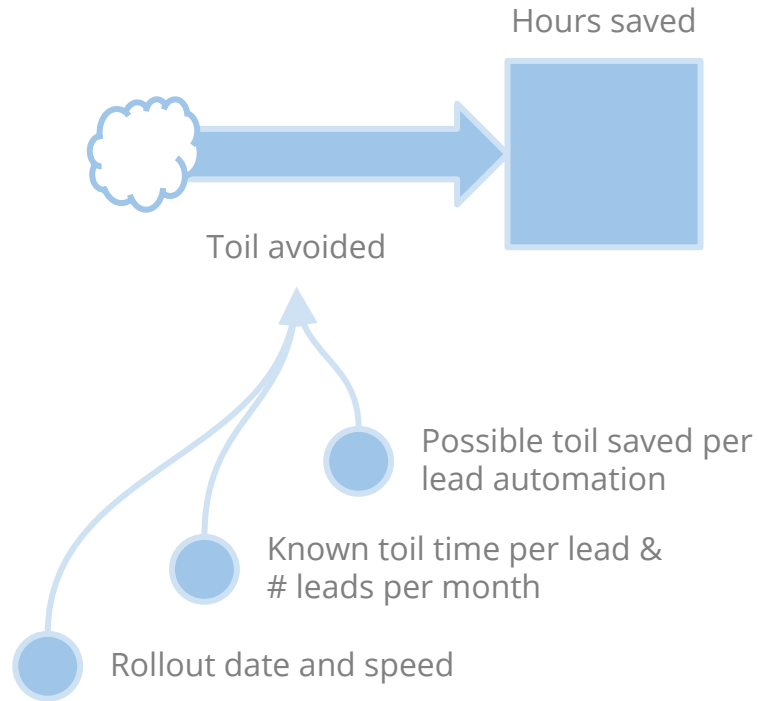
Automations Running



Support Team

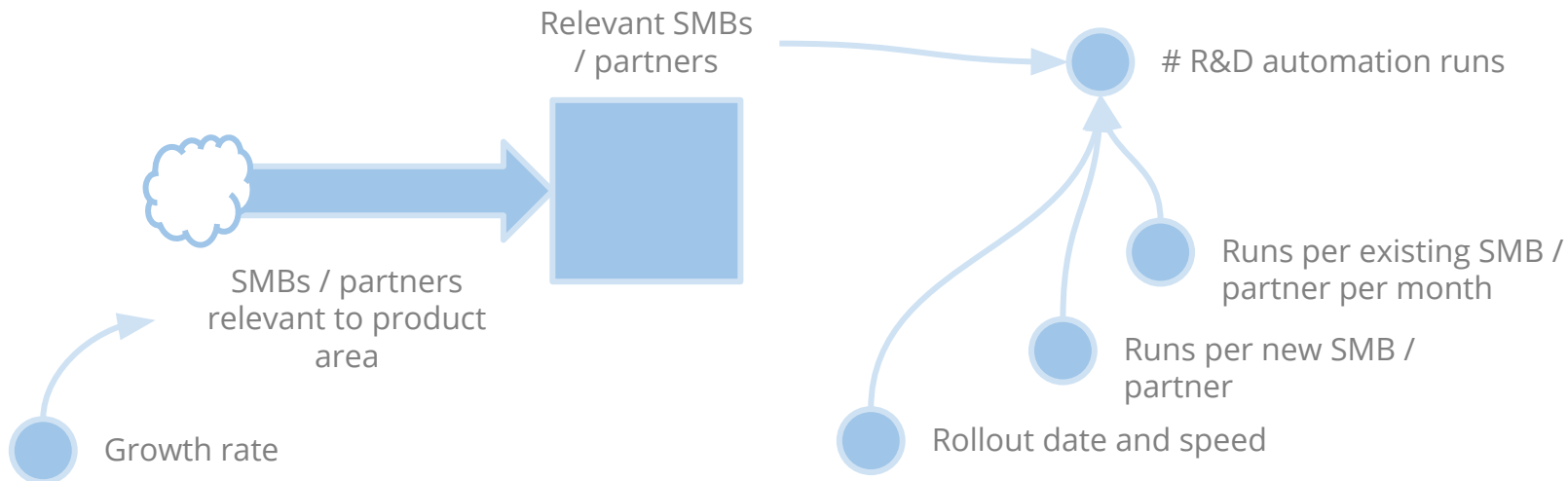


Sales



R&D Feature Rollout

SMB = Small and
Medium Businesses

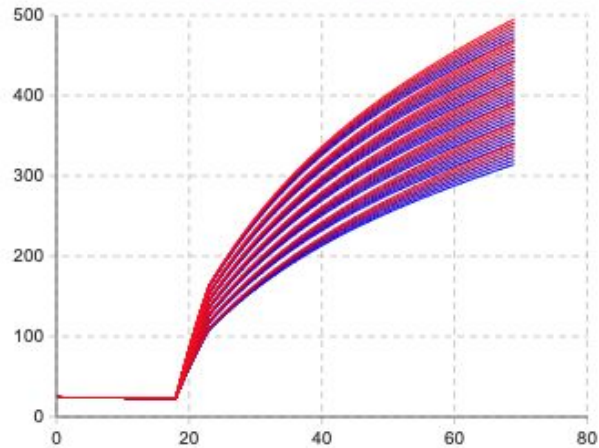


Results

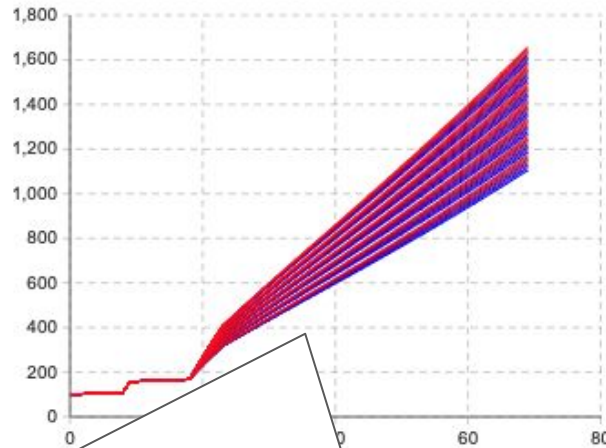
Key Quantitative Findings

Automation Uptake

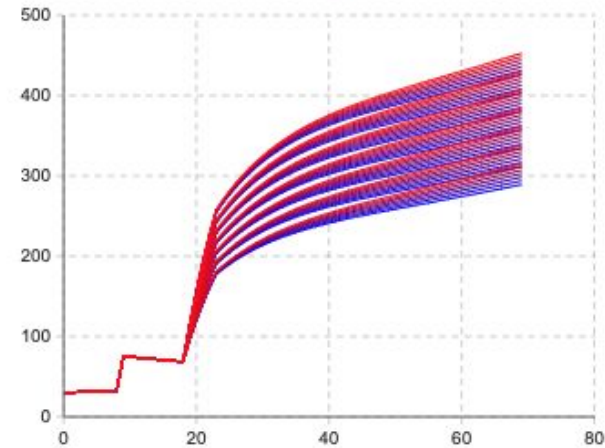
Partners Using or Trialing



Automations Created



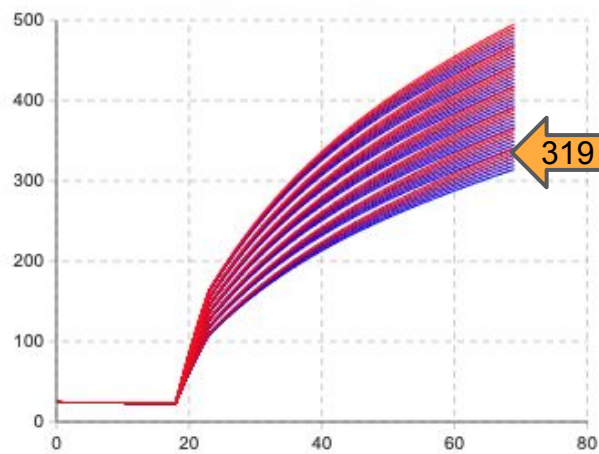
Automations Running



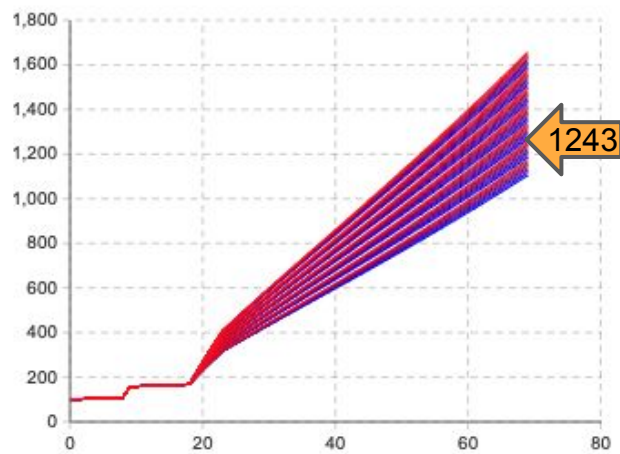
We explored a variety of **good-fit partner adoption** and **poor-fit partner adoption** scenarios (9-15% good fit, 1-15% poor fit)

Automation Uptake

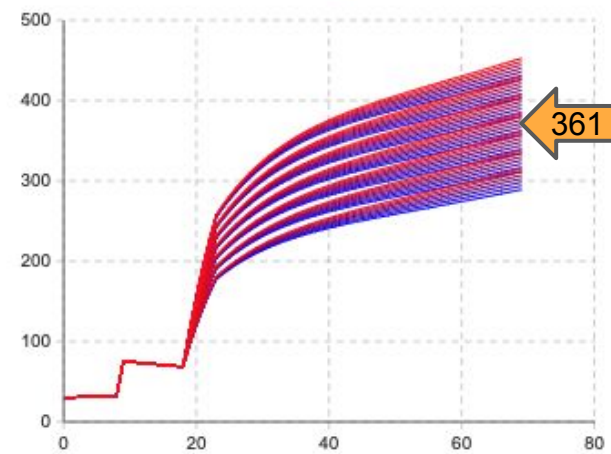
Partners Using or Trialing



Automations Created



Automations Running



Results: Uptake pretty much where we expected

External Automations Running

Projected:
350

Actual:
361

Error: 3.14%

External Automations Created

Projected:
1300

Actual:
1243

Error: 4.38%

External Automation Users

Projected:
400

Actual:
319 - 388*

Error: 3% - 20.25%

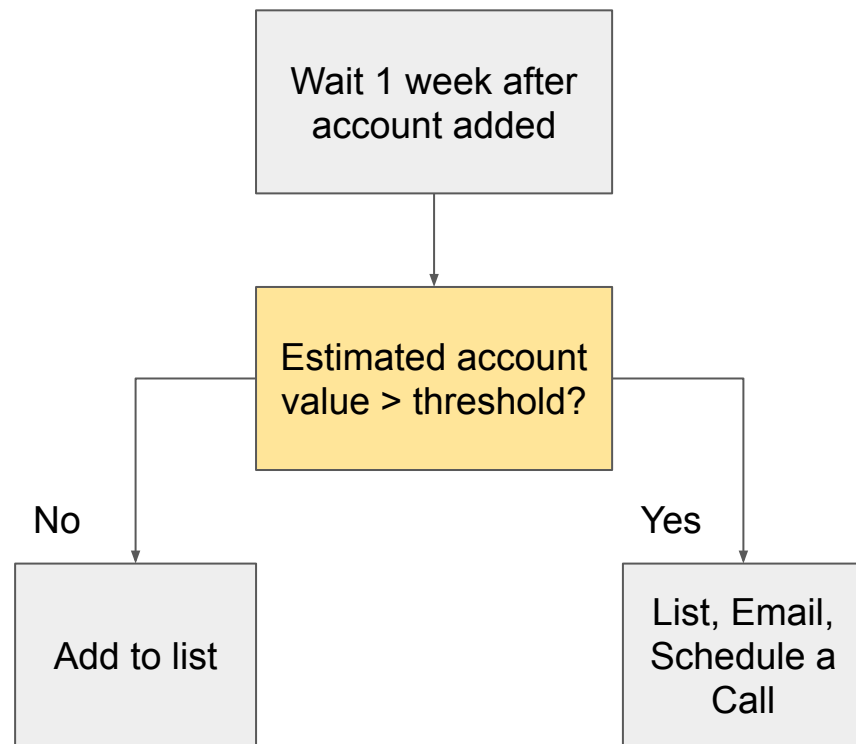
(Some came back
from the dead!)

Key Qualitative Findings

Automations Make R&D Features Possible

Takeaway

- Met with almost all R&D teams
- Most had a **frequently-requested feature** that was **cost-prohibitive** without automations
 - “Time saved” was not the correct framing

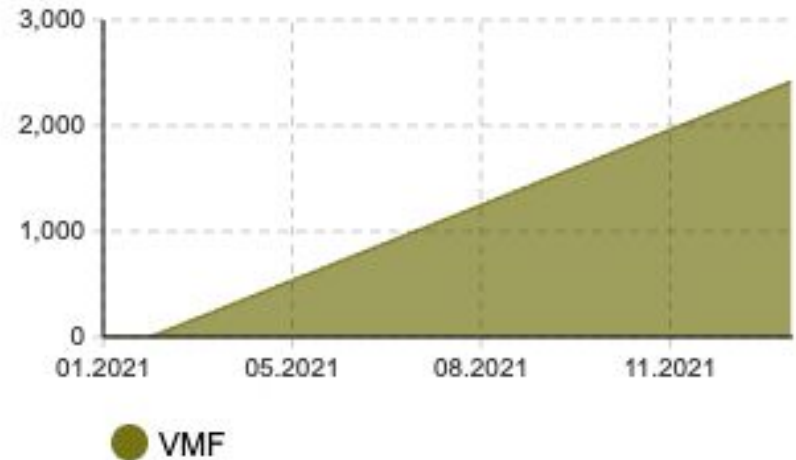


Automations Can Help Address Pain Points

Takeaway

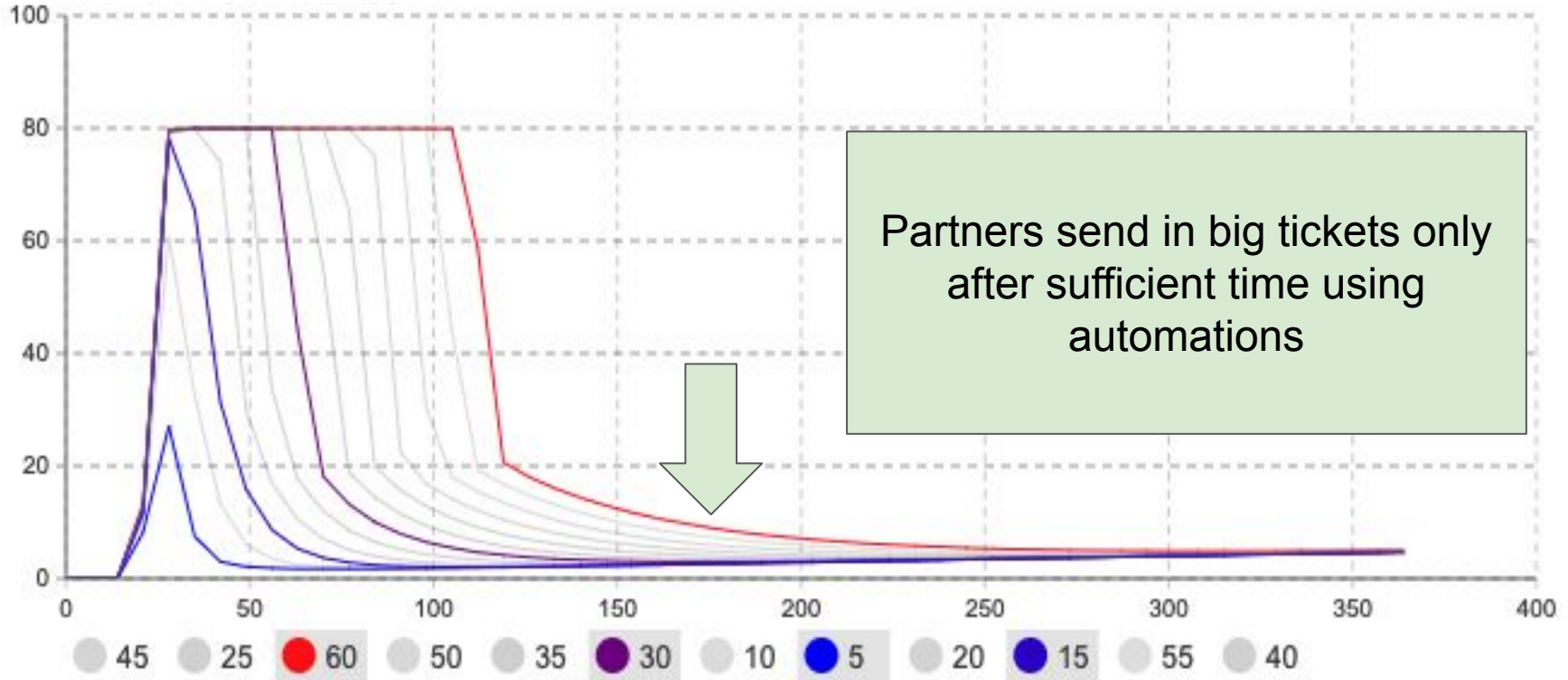
- Sales has daily toil
 - e.g. **duplicate checks**
- Automations can **remove toil**
 - QoL improvement
 - Performance improvement*

Toil Hours Saved (Cumulative)



What We Got Wrong

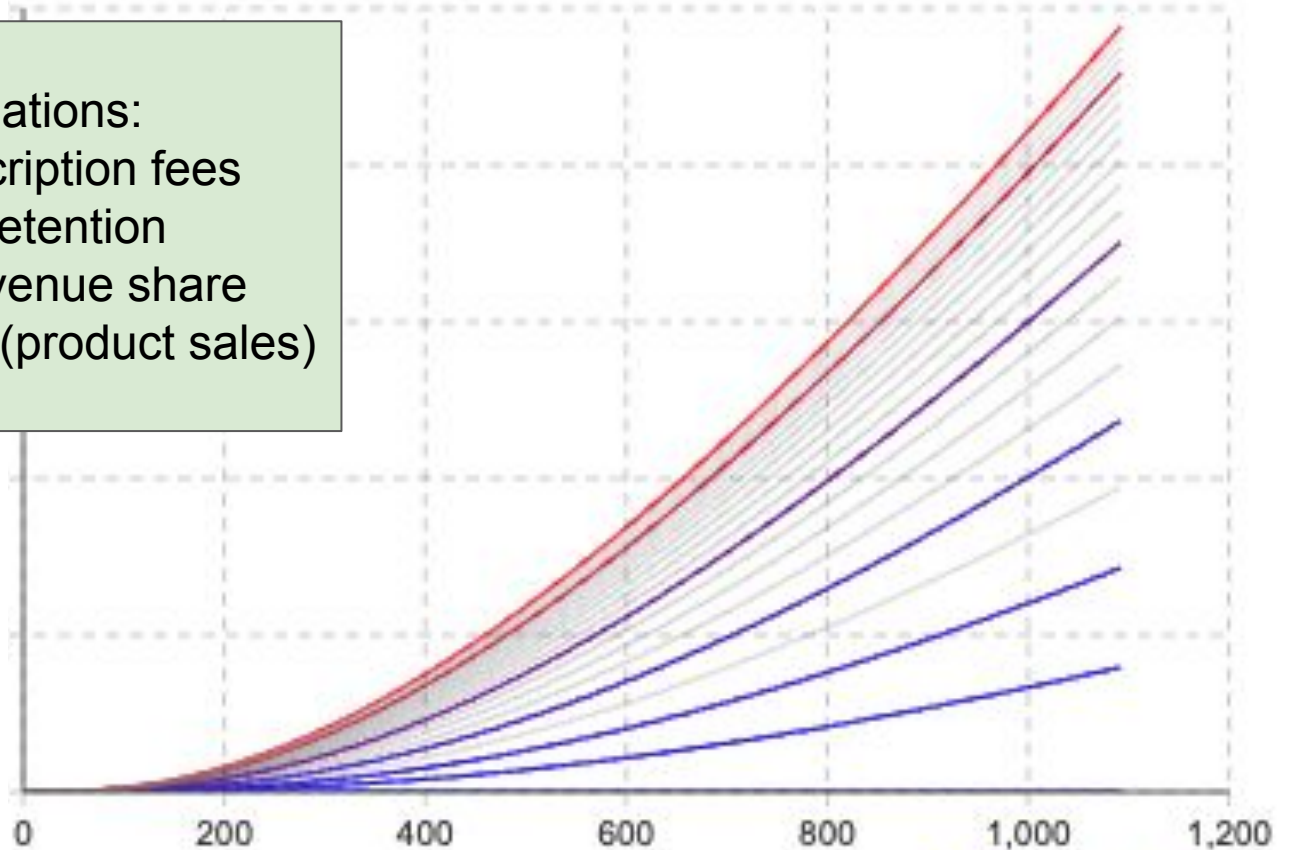
Support Wave



Automation-Attributable Revenue

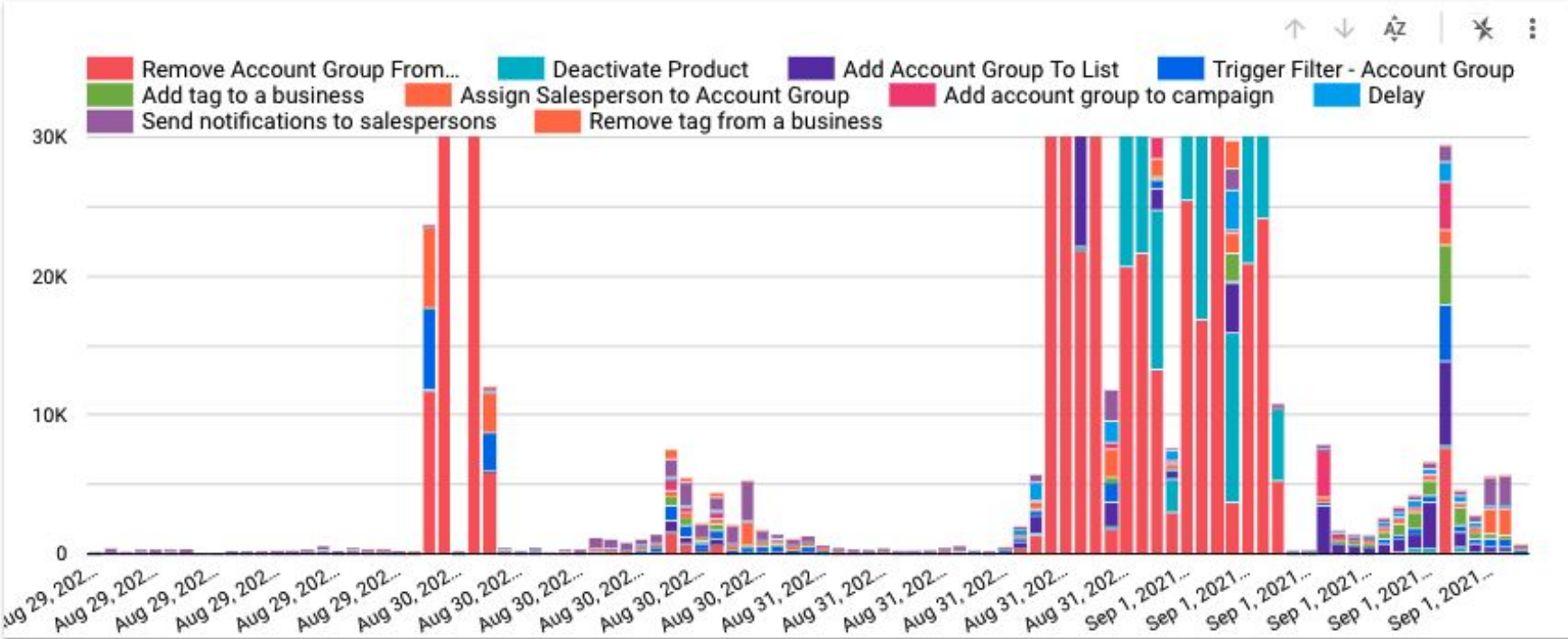
Revenue from automations:

- **Explored:** subscription fees from increased retention
- **More Likely:** revenue share from activations (product sales)

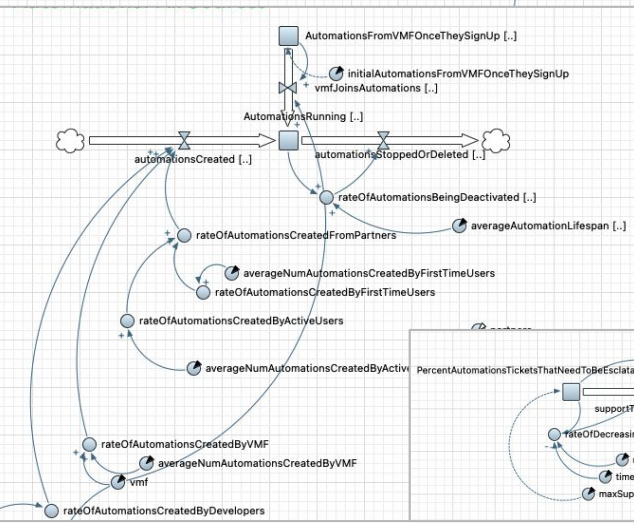
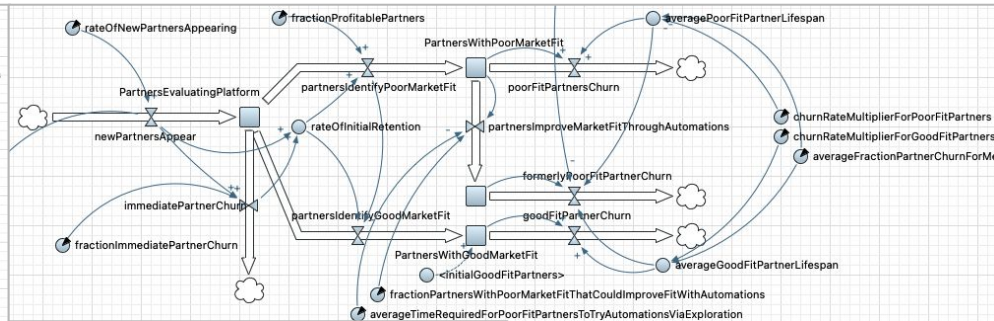
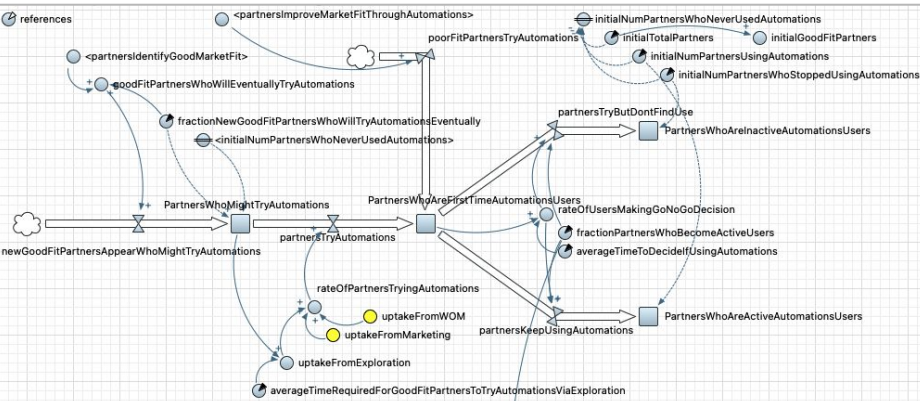


Noisy Neighbors

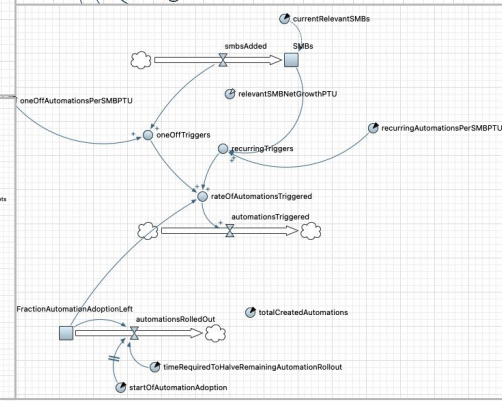
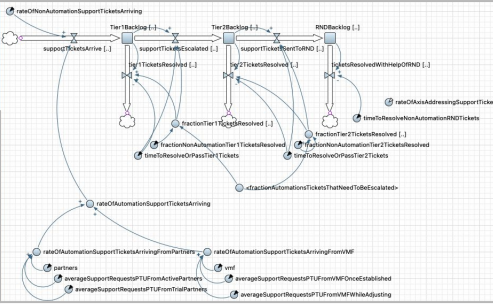
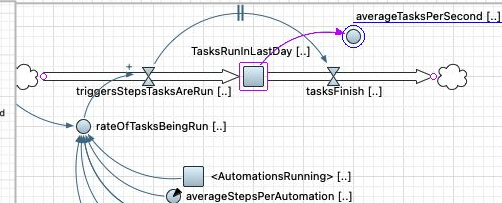
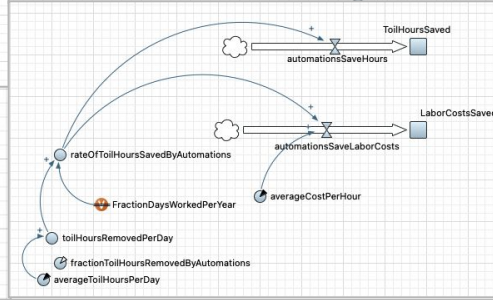
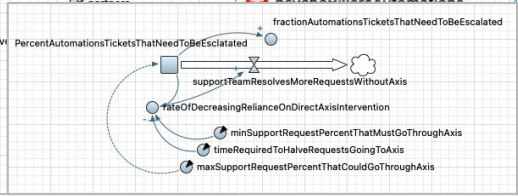
Steps Executed



Recap



- luckyCharmsAutomations
- mitAutomations
- npEasyAutomations
- colPanicAutomations
- liiBizAutomations
- spokesbustersAutomations
- totsAutomations
- iNSyncSMBAutomations
- scrummibearsAutomations
- pioneersAutomations



Key Takeaways

- Simulation is great for what-if analysis and risk management
 - Even without data
- Support your support teams
- Beware the outliers

