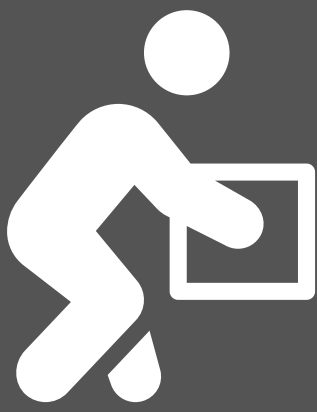


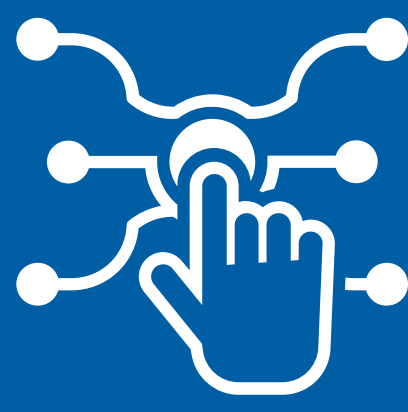
MANUAL vs AUTOMATED

DISTRIBUTION PROCESS

WHAT YOUR CURRENT STEPS MIGHT BE



HOW YOU COULD AUTOMATE THEM



Answering Phone or scanning entire email box for client request

Set up online form to receive request (We like Typeform!)

Interpret instructions over phone or email, something may not be complete and will require follow up

Request received via online form with specific instructions directly from client (eliminates errors)

May not be doing this at all or may be tracking by manually inputting information on a spreadsheet

Create a line item to track status of request using google sheets, crm, etc.

One team member receives initial request (again likely via phone or email)

Send auto alert to team member(s) responsible via email, text, chat, task list, crm task, etc.

Team member processes request at assigned custodian

Team Member processes request at appropriate custodian

Once completed, if you are tracking the process, member marks as complete

Once completed, mark as complete in crm, spreadsheet, etc.

Manually enter the update in the CRM or email regarding the request.

Update automatically sent to CRM, Tracking Sheet, etc. to update with completion information entered by employee/team member

Manually call or email the client with whatever unique information is needed to confirm completion

Update sent to client via email or text letting them know their request has been completed along with unique information

AUTOMATION PROVIDES THE EFFICIENCY YOUR TEAM NEEDS WITH THE ACCURACY YOUR CLIENTS EXPECT.