

autobooks

---

ACCELERATE  
2022 VIRTUAL EVENT

**The data. The tools.  
Our findings.**

**PART 1**

**#SmallBusinessObsessed**



# **KIM REHER**

Director of Product  
Training, Autobooks

Autobooks training

Most impactful resources  
and takeaways

Training plan for 2023

# Autobooks Training Approach

## OUR GOAL

To provide your teams with the tools they need to serve their valuable customers.

*We accomplish  
this goal in  
three ways:*



Ongoing  
Learning

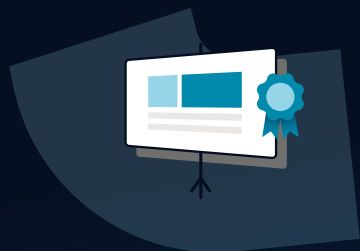


Resources



Classroom  
Training

# Autobooks Training Approach



## Classroom Training

Multiple webinar opportunities per month, with unlimited seats available for your teams and access to class recordings



## Channel-specific Resources

We provide assets for download such as: Product and Support materials, Sales tools, videos and more



## Ongoing Training Support

Educational Newsletters  
Feature enhancement updates

[autobooks.co/training](https://autobooks.co/training)

# Most impactful ways to leverage our resources

- Follow our recommended step-by-step training plan
- Leverage Autobooks energy to teach your staff at implementation.
- Continue to leverage our webinars for refresher training and new hires.
- Arm your Sales staff with our tools to have Autobooks talking points at their fingertips
- Extend the learning

# 1

## Create Staff Awareness

Getting all your staff on the same page requires great communication. We'll help you make that easier with announcement email copy.

- [Internal Announcement Email](#)

# 2

## Prepare Customer Support

Customer support is the backbone of product success. Your call center teams should be trained prior to going live with our online payment features.

- [Common Consumer Questions](#)
- [Autobooks Customer Care team information](#)
- [Autobooks Enrollment Guide](#)
- [Autobooks Chargeback Process](#)

# 3

## Train Frontline Staff

Equip your staff with the information they need to answer questions and promote these exciting features to customers.

- [Autobooks Enrollment Guide](#)
- [Invoicing product page](#)
- [Payment Form product page](#)
- [Accounting and Reporting product page](#)

# 4

## Refine Your Pitch

Help your sales drivers with the information they need to effectively convey the value proposition of the online payment features.

- [Starting the Conversation](#)
- [Feature Comparison Chart](#)
- [Talking Points for Non-Profits](#)
- [Talking Points Small Businesses](#)

# What's new now

NEW AND IMPROVED

## Autobooks Support Center!

- Easy to search, right in the app
- How-to articles
- Business Growth blog posts
- Coming soon:  
Instructional Video

The screenshot shows the Autobooks Support Center interface. At the top, there is a navigation bar with the Autobooks logo, the text "Support Center", and a link to "Submit a Support Ticket". Below the navigation bar is a large light blue banner with the heading "How can we help you?" and a search bar containing the placeholder text "Search for answers". Below the banner, there are six featured articles arranged in a 2x3 grid. Each article has an icon, a title, a short description, and a link icon.

**Getting Started**  
New to Autobooks? These topics will help get you on the path to success.

**Invoicing**  
Send a professional online invoice or estimate right from online banking.

**Accept a Payment/Payment Form**  
Learn about your unique payment form link. Links can be shared via text, email, social media, or your website.

**Payment Processing**  
Explore frequently asked questions about how payments are processed.

**Accounting**  
Automate your bookkeeping and access financial reports, directly inside online banking.

**Administration**  
Administer users, company details, profile info and more.

# What's up next in 2023

## Autobooks Knowledge Base

Accessible in the Hub

## Autobooks Training Kits

Unlock assets to everything you need to conduct classroom training, quiz your learners, and extend learning beyond the classroom

## New Training Webinar events

Look for these new opportunities in the Hub



The graphic displays the contents of the 'Autobooks Training Kit'. It features a central green header with the title 'Autobooks Training Kit Contents' and the tagline 'Everything you need, all in one kit'. Below this, eight items are listed in a grid, each with a number, an icon, and a brief description:

- 01 Training Deck:** One deck for training all your employees (Icon: person at screen)
- 02 Leader Notes:** Talking points, class management (Icon: clipboard)
- 03 Class Quiz:** Check for learner retention with this quiz (Icon: question mark)
- 04 Participant Guide:** Help your learners take meaningful notes (Icon: stack of papers)
- 05 Branch Summary:** Product talking points for busy team leads (Icon: megaphone)
- 06 Team Huddles:** Topics for your team leads to keep staff current (Icon: group of people)
- 07 Educational Emails:** Email content to sustain staff learning (Icon: envelope)
- 08 Help and Resources:** Where to go when you need answers (Icon: gear)

# Autobooks Training Resources

**PREPARE YOUR STAFF.  
SUPPORT YOUR CUSTOMERS.**

[autobooks.co/training](https://autobooks.co/training)



**autobooks**

---

**ACCELERATE**  
2022 VIRTUAL EVENT

**#SmallBusinessObsessed**