

autobooks

ACCELERATE
2022 VIRTUAL EVENT

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

PART 2

#SmallBusinessObsessed



JORDAN SKOLE

VP of Product Growth,
Autobooks

About the team

Where we came from

Culture

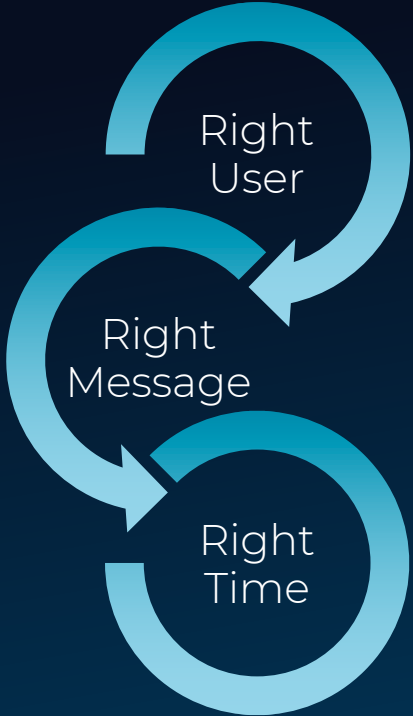
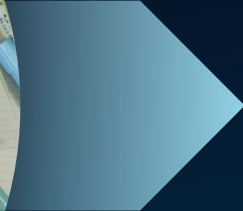
Recent Updates

What to expect in 2023

Once upon a time on a roof in Detroit



Using technology to help small businesses grow





Meanwhile in banking..

And then COVID changed everything again

Elyse

Owns a business that specializes in gently used furniture and home furnishings

In business since 2011

Before Covid-19:

Customers came to the brick-and-mortar location and paid cash or with a credit card in person.

When the COVID-19 pandemic started, Elyse lost her daily foot traffic:

Elyse needed to find a way to give customers access to inventory and provide an easy way for them to make a payment.

“We shifted our efforts to Facebook where we posted photos of our furniture for sale.

When a customer wants to purchase a piece, we simply send a payment form link so the customers can pay online.

Now, we can continue doing business during this challenging time when customers are practicing social distancing. It also gives us a way to connect with our customer base and gives them a convenient way to pay for the products they love.”

Q:

Why was
Autobooks able
to help this
small business
get paid?

A:

**Because a small business
banker decided to make
payment software available
to small businesses.**

Q:

What do small
businesses and
banks have in
common?

A:

We're all competing against big Silicon Valley companies with bigger marketing budgets, bigger teams, and deeper technology pockets

OUR VALUES

Bankers are warriors

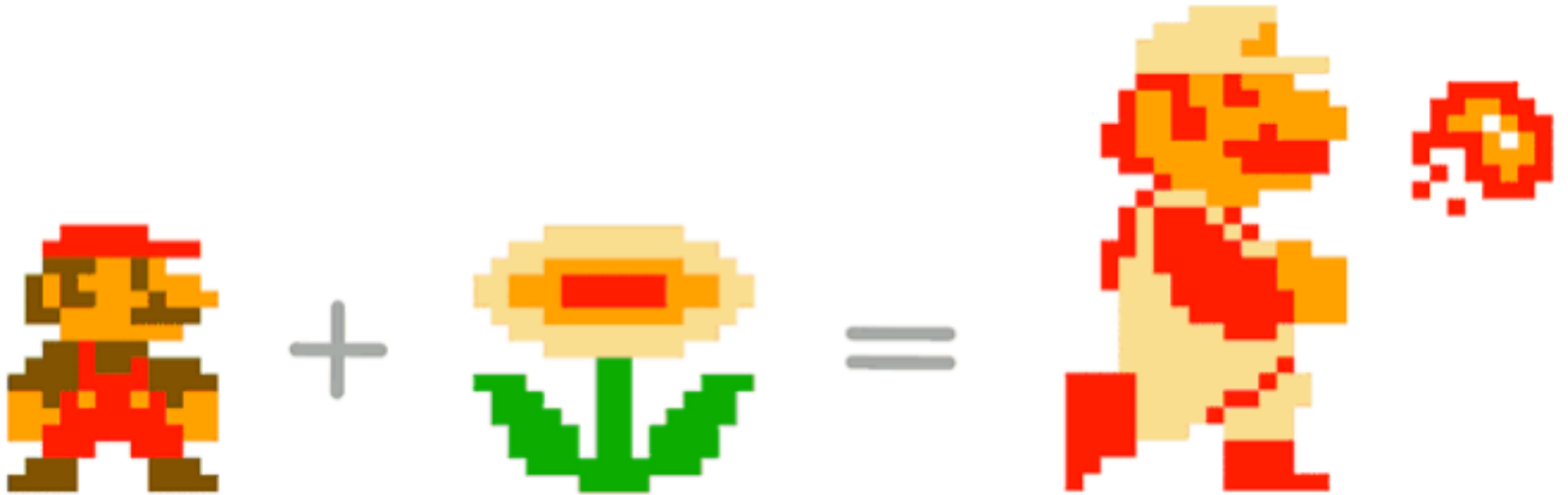


Image Credit: Samuel Hulick

OUR VALUES

No Gatekeeping

“Let me show
you how to do
that in the hub”



OUR VALUES

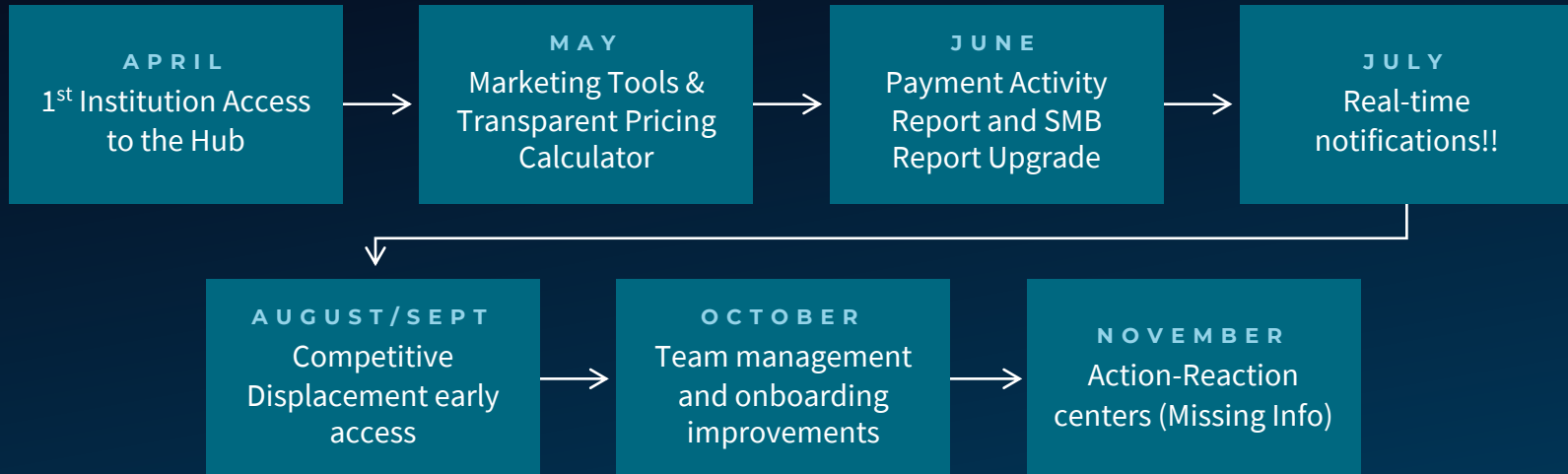
**Ruthless,
Relentless,
ROI**



The Autobooks Hub in 2022: Building foundations, increasing transparency, delivering assets

Started as SMB Growth
(old stats and numbers)

Needed to scale
with company



What we're thinking about for 2023

Referrals

Help you get visibility into who on your front lines is helping SMBs start using Autobooks and tracking capabilities to manage incentives

Banker Action-reaction Center

See who has just signed up for Autobooks and click to help them make progress. Drive enrollments, stop attrition, and win back business.

Competitive Displacement Actions

Get identity intelligence and real time notifications of when your SMB relationship is at risk. One-click capabilities to trigger actions to preserve the relationship.

Referrals

Once upon a time in 2023 a small business owner walks into a bank:

- Embedded in the QR code is the banker's referral link.
- When the the QR code is scanned, Autobooks attributes the small business owner with the banker.



"Hey! Do you have a way to accept digital payments?"

"Yes! We do, let me show you how it works..."

The banker hands the small business owners a "Credit Card" with a QR code on it

"Scan this QR code. It will take you to my **payment form**. You can use this "Credit Card" to **make a payment** and see how it works."

Banker Action-reaction Center

Submit Missing Info for "Word Alive Resources" ✕

What year was the business formed?

What's the business title?

What's the business structure?

What industry is the business in?

< > Submit >

SMB NAME	ENROLLMENT DATE	SUBSCRIPTION TYPE	
Purry And Son Trucking Corp	12/1/2022 2:22:59 PM	FULL	Ignore Add missing info
Aluline LLC	12/1/2022 7:54:29 AM	FULL	Ignore Add missing info
Word Alive Resources	11/30/2022 5:10:04 PM	FULL	Ignore Add missing info
	11/30/2022 3:15:08 PM	FULL	Ignore Add missing info
	11/30/2022 1:22:22 PM	FULL	Ignore Add missing info
Community Church Of New York City	11/29/2022 2:52:30 PM	FULL	Ignore Add missing info
Pro Se Practice LLC	11/28/2022 1:10:31 PM	FULL	Ignore Add missing info

Take action on behalf
of your customers

Stop Attrition and win back business

Target competitors at the time of connection

Target competitors with large customer deposit activity

CUSTOMER ID	CUSTOMER NAME	CUSTOMER TYPE	CONNECTION DATE	COMPETITIVE PAYMENT VENDOR	TAKE ACTION
19656	Ernesto Quigley	Personal	11/26/2022	SQUARE	Call them Send Email
51361	Dexter Russel	Personal	11/26/2022	PAYPAL	Call them Send Email
54136	Wiegand, Hansen and Lowe	Business	11/19/2022	SQUARE	Call them Send Email
			11/18/2022	ZELLE	Call them Send Email
			11/11/2022	VENMO	Call them Send Email
83679	Barry Schoen	Personal	11/9/2022	SQUARE	Call them Send Email

CUSTOMER NAME	CUSTOMER TYPE	COMPETITIVE PAYMENT VENDORS	MOST RECENT PAYMENT	COMPETITIVE DEPOSIT COUNT	COMPETITIVE DEPOSIT
Bartell Inc	Business	VENMO SQUARE PAYPAL ZELLE	11/30/2022	50	\$49,744.83
Mr. Dawn Beatty V	Personal	ZELLE PAYPAL VENMO	11/22/2022	78	\$60,167.88
Becker, Balistreri and Stamm	Business	ZELLE VENMO	11/21/2022	24	\$7,667.17
		PAYPAL VENMO SQUARE	11/21/2022	17	\$47,657.98
		PAYPAL SQUARE	11/20/2022	51	\$73,247.66
		VENMO PAYPAL SQUARE	11/20/2022	71	\$55,744.04
Celia Ullrich	Personal	VENMO PAYPAL	11/20/2022	21	\$67,771.31

The above are design prototypes

We need your help

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autobooks.co/hub-build-together

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