

autobooks

ACCELERATE
2022 VIRTUAL EVENT

**The customers.
The bankers. Our strategy.**

PART 1

#SmallBusinessObsessed



OLVIA TREILING

Customer Success,
Autobooks

SMB Success at Autobooks

Stories from the front-lines

Building SMB success at your FI

Small Business Success at Autobooks

Meeting the
moment of need
for a small
business owner

How our
team
operates

Working with the
FI to make a
bigger impact

Stories from the front-lines

A landscaper wearing a bright green safety vest and blue jeans is using a red and black hedge trimmer to trim a large, dense green bush. The background shows a brick wall. The scene is outdoors with natural lighting.

STORY ONE

Residential & commercial landscaping business.

Previously accepting check payments from their clients.

A person wearing a dark apron splattered with various colors of paint is operating a screen printing press. They are using a squeegee to push ink through a screen onto a substrate. The background shows a workshop setting with various equipment and a clipboard on a stand.

STORY TWO

Custom screen- printing business.

Previously processing payments
through Square for over 2 years.

A semi-truck is driving on a highway in a desert landscape. The truck is white with a long trailer. The background shows a clear sky and distant mountains. The text is overlaid on the left side of the image.

STORY THREE

Trucking & freight hauling business.

Working with their FI to get paid.

A large, light-colored wooden crate sits on a wooden pallet in a dimly lit warehouse. The crate is secured with three blue metal latches on its front face. The background shows the rough, industrial interior of a warehouse with concrete walls and a dark floor. A piece of equipment, possibly a pallet jack, is partially visible to the right of the crate.

STORY FOUR

Crate shipping business.

Previously accepting wire
transfers for all payments

Building Small Business Success at your FI

Leverage the
Autobooks Hub to
identify moments
of need

Build a welcome
and discovery
process

Build a proactive
monthly touch
point process

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