autobooks

Session 1: A Healthy Program

A Healthy Program Start begins with proper setup and taking action. Complete our 30-day Challenge to kickstart your Autobooks program. We'll see you again next month to dive deeper into the data we provide and how to perform better customer outreach!

30-Day Task List	Task Owner	Completion Date
1. Log into the Autobooks Hub	_____	_____
2. Set your notification preferences - Click on your name in the upper right corner of the home page - Navigate to the Notifications section - Toggle on your preferred notifications	_____	_____
3. Set up your team as Hub users based on role type (Marketing, Training, Treasury, etc.)	_____	_____
4. Download the SMB and Payment Reports from the Hub	_____	_____
5. Access the Progress Center and contribute missing customer info for those pending payment approval	_____	_____

Best Practices and Additional Information

SMB Report
- Send thank you emails to enrolled customers to reinforce the outstanding customer service you provide
- Targeted calling for those customers with high payment volume potential, to encourage payment process with the tools

Payment Report
- Touch base with the most active users to ensure satisfaction, and begin cross sell/upsell conversations
- Create customer testimonials from these touch points and share success stories internally

Progress Center: Missing Info
- Login daily to address any pending approvals
- Reach out to the customer to obtain missing info if you don't have it on file

Progress Center: Approved Customers and Activated Customers
- Use this data as a reference for customer questions regarding approval status and velocity limits
- Provide approval data to business bankers as opportunities for customer outreach

Important Links
- www.autobooks.co
- Marketing Assets:
  www.autobooks.co/marketing
- Training Assets:
  www.autobooks.co/training
- Autobooks Customer Support Center:
  help.autobooks.co/knowledge
- Product Updates
  www.autobooks.co/product/updates

Operational Forms:
- FIS Users:
  learn.autobooks.co/fis-operational-form
- Banno Users:
  learn.autobooks.co/banno-plugin-reporting-form
- NCR Users:
  learn.autobooks.co/ncr-operational-form
- Operational forms for Q2, CSI, and other will be available soon