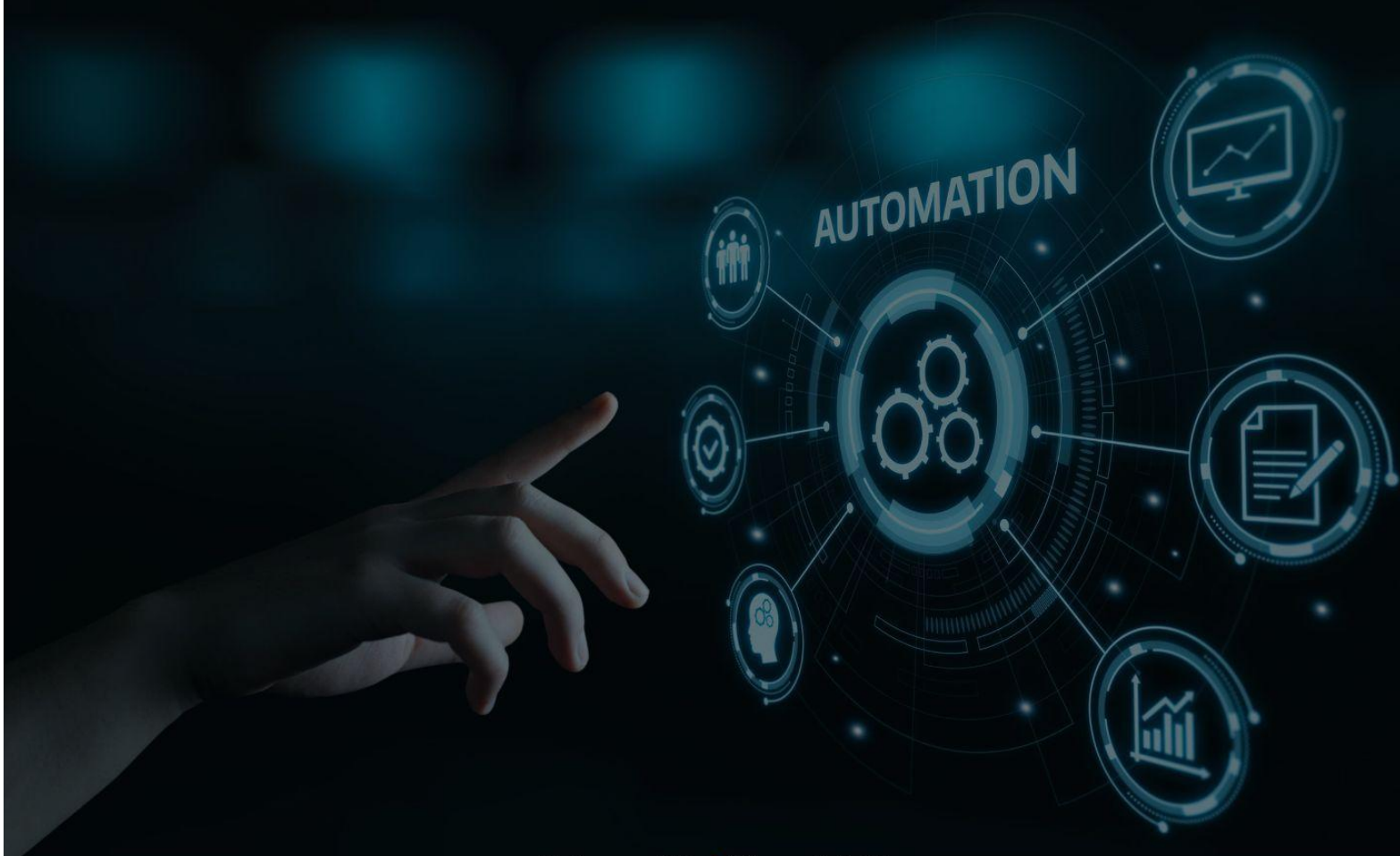# AUTOMYO

EMBRACE AUTOMATION

Customer service automation

THE VALUE OF AUTOMATION IN THE DIGITAL ERA
AND HOW TO TAKE THE FIRST STEPS
IN PROCESS AUTOMATION

AUTOMATION

TABLE OF CONTENTS

01.

INTRODUCTION TO AUTOMATION

All that we can help you connect & automate

This work is not only about automation. Though this is a rather wide-spread word in our market, our final aim is to talk to everyone about daily work, individual and team well-being and about our own future.

3 rules for success
As the famous economist Adam Smith noticed in "The Wealth of Nations", there's a reason behind the success of some entities (nations or individuals). This reason can be traced back to three great pros of work division:

1. Workers can perfect some specific skills;
2. Workers avoid the delay and distraction of switching from one task to another;
3. Workers use, or even invent, specialized equipment.

Nowadays, the potential of work division might seem quite simple and old-fashioned. We are used to hearing about new working methods that push people to bring their knowledge in one unique pool (the team), thus improving shared know-how and increasing innovation potential.

Technology Resource
We do not think that these strategies are incorrect. However, we think that they cannot be our only way to move forward. Moreover, the latest great advancements in technology allow people to develop skills in more than one field of expertise, rather than specializing in only one craft.

Work-related Problems
But there are signs in our society that show how unsustainable the ways we work are in the long term (see this report by Deloitte about the huge numbers of burnouts

among the so-called "knowledge workers").

Reorganizing our way of working
One way to get out this vicious mechanism could be that of holding on the plurality and **diversity of tasks** we already have, although learning to improve our management skills and allowing our employees to to focus only on their core activities.

The Virtual Employee
We should indeed focus only on those tasks that require particular knowledge and that increase our sense of satisfaction.

The other kinds of tasks are usually repetitive, simple and do not require advanced skills. They can be perfectly managed using automation tools. And that's where Automyo can help you.

02.

THE (NEW) VIRTUAL EMPLOYEE

Why every company should have a (new) virtual employee to leverage its human capital and Real-life Case histories

What is a virtual employee?

If it's the first time you hear the term "virtual employee", and you are wondering what exactly it means, here's the answer:

*"The word **virtual employee** can refer to employees who work for your*

business but, instead of coming into your office or physical location, provide their services remotely."

In our global market, this kind of work is gaining increasing visibility and importance. The basic idea is to find a specific collaborator for a specific area or task that does not need human creative effort: input-output-done.

They can perform a wide array of tasks for your business, from data entry and scheduling to posting on social media or clearing out your inbox. For small businesses, virtual employees offer a **cost-effective solution** to get more done and grow their operations.

Pros of Using a Virtual Employee
It's not just about what you pay to employees, though salaries for virtual employees are often fairly reasonable. Choosing to implement a virtual employee also allows you to save on overhead costs like office space and equipment (that's why it is called virtual).

While with on-site employees you often have to worry about recruitment and hiring, with virtual employee agencies this part of the process is handled for you. In addition to the practical aspects, working with virtual employees allows you to expand the talent pool your company has access to. If you live in an area without a huge base of job seekers, you can still find hard workers and people with the skills you need to support your company's most important operations.

Moreover, if you want to pass off some of the more repetitive tasks you deal with, this can be a quick and inexpensive way to do it.

Critical issues when using a Virtual Employee

Remote workers still suffer from the same problems on-site employees have. They, too, need to be engaged and motivated (if not from you, from someone else). Otherwise, they'll be less productive and their quality of work will decrease.

Once you hire a virtual employee, it's your job to make sure they're working effectively within your small business. This starts with a thorough training about the exact tasks you need them to carry out. Once they're trained, set specific deadlines and goals, so they know your expectations.

Ultimately, managing virtual employees is a lot like managing in-person employees. Even though you're not interacting with them in person each day,

you should consider them as a member of the team and make sure they have the same support and guidance as anyone else.

However, virtual employees are a fruitful asset only if and when you are prepared to manage them as best you can. In particular:

- A clear need
  You must know what you need and understand how they will fit in your company, according to their skills and values.
- Logistic
  Remote working can not have the same levels of efficiency for all the company positions. Some functions require people working together (i.e. on machinery);
- Training & Coach
  Remote workers need training and continuous coaching to increase their performance too. For temporary and minor activities this could be a waste of resources;
- IT Support
  Diversity increases the ability to overcome challenges. On the other hand, heterogeneity in your systems and architecture only increases efforts and expenses of your IT function;

From Traditional to New Virtual Employee

Today, there is a huge amount of tasks that remote working employees cannot carry out efficiently. Fortunately, many of these can be automated by what in the innovation field are known as RPAs, Robot Process Automation.

Their goal is to automate the repetition of even very complex and articulated processes made of a huge amount of single repetitive tasks.

With this kind of automation the company can drastically reduce the costs (time-energy-money) related to critical activities that cause high levels of frustration for the real virtual employee.

Claudio is one of the first RPA platforms designed to support micro, small, medium and large businesses in the automation of their processes.

Claudio puts together the Pros of a Traditional Virtual Employee and those of a digital robot.

- No Human Errors
- No Stress
- Get Repetitive tasks easily done

As we said, most SMEs have tons of little tasks they need to get done throughout the day. Some of them require your unique vision or skill. Others don't. If you spend a significant amount of time doing repetitive tasks like creating spreadsheets or responding to simple email inquiries, you'll have less time to work on growing your business, designing your future or just checking what the market is cooking.

These are all critical issues that suffer from the pressure of the boring, stressing, costly routine of repetitive tasks. In this sense, task automation represents a critical methodological approach to get things done.

High Specialization, Effectiveness & Productivity
Let's just focus for a moment on the other side of the coin: not the reduction of costs but the growth of your business.
Having a highly specialized, fastly operating employee - virtual or not - is the keystone of economic growth.
The division of labor, the consequent creation of interconnected and symbiotic value chains - within and between companies - is what Adam Smith said to be the only way to grow in capability and produce economic margins for a business: its productivity.
Having more operations done, in a better way, in the same amount of time, to meet the market's demands is the colloquial translation of setting up an effective and efficient productive business.

The problem of diminishing specialization
But today - as recently pointed out in an article by the Financial Times - no matter how much we try to cut costs (even human labor costs) and try to boost speed, companies are losing productivity, because people are becoming less productive. Yet we could argue that we passed the limit of both cost reduction and velocity. That might be true, but some important names and academics introduced a more interesting phenomenon known as "the law of diminishing specialization". To please our need for variety, and to relieve ourselves from repetitive and boring activities, we avoid specialization.
This trend is also due to the fact that in many cultures it seems almost impossible to deem specialization worthy. We'd rather leverage the idea of creativity, multi-skilling, transversal management, the expression of human imperfection, thus losing the grip on what is the basis of productivity: to get things done well and in time.

Further increasing this risk, the latest strong digitazione wave brought an increasing number of distractions hitting specialists as much as managers or creatives.

To avoid this dangerous drift and employ digital solutions to empower our business, work experience, support our creativity and respect our diversity, we should quickly identify those boring *and* highly specific activities and assign them to a RPA.
To use Smith's philosophy, an RPA will never become more stupid and ignorant than the process we designed for it and it will stay always very focused on the individual object (goal) it has to obtain: constant attention span, no distractions, no temptations.

From the perspective of a RPA, every task is a "pin" done by a specialized "pin maker". And every process can be made of many, many pins of different sizes and materials.

Pros of Using Claudio as a Virtual Employee

While hiring a physical virtual employee can be an easy and cost effective way to grow a small business team, using an automation tool such as Claudio as your new virtual employee can have the same advantages with less side effects. The edges of an automation tool:

- **Ready to work in 0 time**
  No need to hire it, it'll manage all the basic activities that currently create bottle-necks for your strategic employees;
- **Flexible**
  Can absorb last-minute tasks to help you build PoCs and reports for your business;
- **No Errors**
  An automation tool completely eliminates errors due to fatigue and digitization;
- **Don't need training**
  Focus your money on your employees and for strategic activities. Manual activities won't be a nightmare anymore.
- **More free time for higher-return activities**
  Time is usually trapped in manual activities that slow your growth. Claudio will free up more of your own time, to work on the things you really need to focus on.
- **Satisfaction and Health**
  Time dedicated to valuable and strategic activities means not only less

stress and burnouts, but also more productivity and engagement inside your company.

Can Claudio's be your (New) Virtual Employee?

A virtual employee is capable of taking on multiple tasks and activities, with more efficiency and less expenditures due to differences in salaries between different global regions and logistic efficiencies.

Speaking of Claudio, it is developed to work with both devs and managers, with pre-set flows that allow your employees to immediately disengage from manual activities. Regardless of your internal skills and system architecture, Claudio can be implemented and configured to support you during your specific activities. Claudio supports companies along their entire automation journey guaranteeing a system that organically grows together with them.

Most small businesses have tons of little tasks that need to get done throughout the day. Some of them require your unique vision or skills; others don't. If you spend a significant amount of time doing repetitive tasks like creating spreadsheets or responding to simple email inquiries, that's less time you have to work on growing your business.

How to Manage the New Robot Virtual Employee
You must have a clear idea of your necessities to work with a Robot Virtual Employee. The same must be for the owners of the different company activities. Everyone should know what are the activities to delegate to your Robot Virtual Employee and organize them in micro tasks to better assign them (i.e. update weekly report is a macro task; the correct way to design a flow to instruct the RPA is "get daily leads from this document, paste them into this DB").

When needs are clear and instructions simple and direct, you can input your orders to the Robot Virtual Employee.

This process is very simple using Claudio, as it can be done using preset flows that only need to be configured with your accounts.

If a preset flow doesn't match your needs, you can create a new flow using the visual drag & drop builder. If something isn't clear or seems odd, please refer to our training resources . They are available on our website and on our youtube company channel (screencast videos, articles, etc).

That's not all. If these are your first steps in the automation journey, contact our support team: we will help you build your first flow and give you suggestions on how to implement it correctly.

03.

CUSTOMER SERVICE AUTOMATION

ENER2CROWD

The first Italian lending crowdfunding platform dedicated to green economy and energy transition. Its aim is to simplify green projects funding with direct investments in the most solid and stable opportunities.

We truly believe that gaining money from greenvesting is the most convenient, effective and quick strategy we can follow to fight climate change and build a sustainable future.

Climate remediation is not just possibile, it is also a great opportunity.

Problem

Integration of the investors' database and information with

external marketing platforms used as CRM or for EMC.

The most critical process was the one involving data extraction from the database, which, previously, was utterly manual. They needed to download enormous Excel files from their databases and filter them accordingly to specific characteristics related to the activity they had to carry out (for instance, to send an email to a certain category of users).

Moreover, they often had to carry out real-time updates. i.e. to monitor certain sections of the platform more than once a day for notifications that the system did not record.

Not only they had to have a certain Excel proficiency - since data gathering and statistical calculations were all processed on that tool - they also had to redo all the data extraction process from the database every single time and to remember all the necessary steps to match the various database tabs with the data they needed. The risk of mistakes or omissions was really high and hard to foresee.

As of real-time updates, they could only hope these didn't happen at weird times since they had to continuously check certain sections and implement the necessary changes.

Solutions

Automated flows for information exchange between different portals without sharing or leaking sensitive information and shielding the pre-existing, high safety levels.

Now, they rely on a flow that allows them to "fish" non-sensitive information straight from the database of their customers. Then, Claudio collects these data according to specific criteria and enters them in an external CRM to manage email marketing activities (here, security is a priority since we're talking about investments).

Another flow allows them to allocate bonuses to registered users for future investing campaigns in real-time (with entries in a wishlist according to a previously identified source or action). This way, they don't have to create another wishlist and do not risk making any mistakes (moreover, it's quicker than writing the list manually).

Recently they started designing another flow, this time related to their Sales BU, which allows them to automatically issue a large number of invoices for different customers at the same time.

What are the perks of Claudio?

Ener2Crowd witnessed an incredible reduction of the

workload needed to carry out the activities above mentioned.

This also reduced the time needed to complete the tasks, which is another great advantage of Claudio's automation.

Moreover, Claudio is incredibly flexible: it allows the customer to get aggregated data from various databases, reporting information companies usually tend to ignore - due to the lack of time or to the large quantity of data to manage.

Last but not least, the feedback we received from Ener2Crowd is that Claudio is also rather fun to use and

they enjoyed discovering all the things you can use it for.

- Almost 95% of operative time saved;

- Critical informations safeguarded;

- No need for IT support to create more information sharing flows;

- Possibility to nurture specific clusters of users.

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04.

AUTOMOTIVE E-COMMERCE

THE HURRY

The Hurry is an e-commerce application for cars and motorbikes. Its mission is to revolutionize the transport industry, using increasingly simpler, more convenient and more sustainable vehicles and long-term rental services

Market Sector: Automotive Car Renting & Sales

Business Unit: Marketing

Needs Description

- Automation of requests for the installation of sensor boxes in the final users' cars;

- Sync of data relative to the box installation among the suppliers', the customers' - insurance companies - and the workshops' platforms.

- Management and finance (cloud invoicing)

Flow Short Description

- Lead generation: harvest and management of data shared by prospective customers and final data entry on a single DB;
- Lead nurturing: programmed and diversified outbound communication actions through different channels (eg. emails, messages, calls, push notifications)
- DB Management: synchronization of information in real-time;

Systems & Apps Involved in the Flow
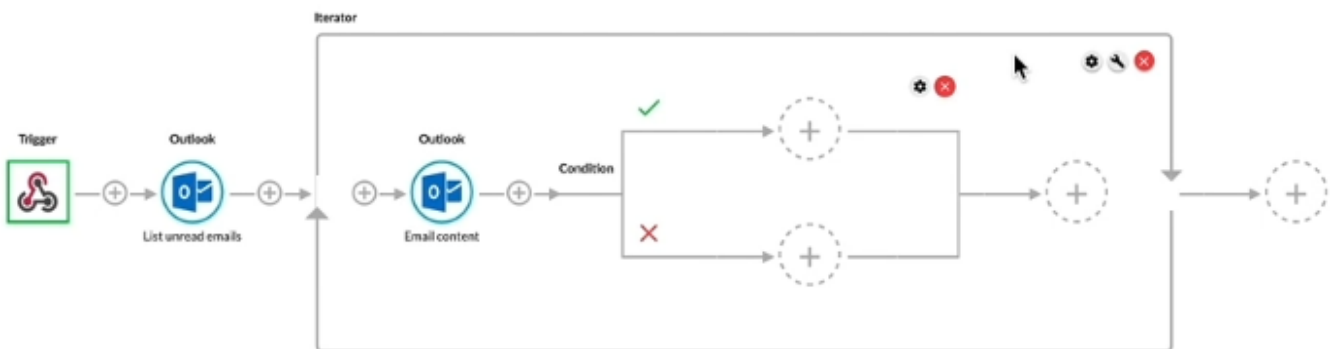
- Website custom API
- Internal messaging systems (Slack, emails)
- Outbound communication systems (Mailchimp/MailUp, Twilio/Skebby);
- Database (Salesforce)

Detailed Flow Description

For the marketing and sales processes, we designed and triggered more than 20 automated flows.

Customer Onboarding

- Request forms in the company's website, on which we set a Webhook URL to send data to Claudio and trigger the flow;
- Salesforce DB, integrated in Claudio's flow, receives the data and creates new accounts and leads depending on the filters and operations the company chooses. Accounts and leads are as many as the calls by the Webhook (hence, as many filled in forms);
- Automatic notification emails/SMS/calls to the people in charge to start the contact stage;
- Automatic emails/SMS/calls to the leads.

Customer Follow-Up

- Email/SMS notification in case the first contact is unsuccessful;
- Email/SMS notification at the end of the first contact and for all the following contacts for each follow-up.

Business Scale-Up

To quickly structure an efficient marketing and sales activity and to support the growth of information flows linked to the rapid development and success of the digital ecommerce platform.
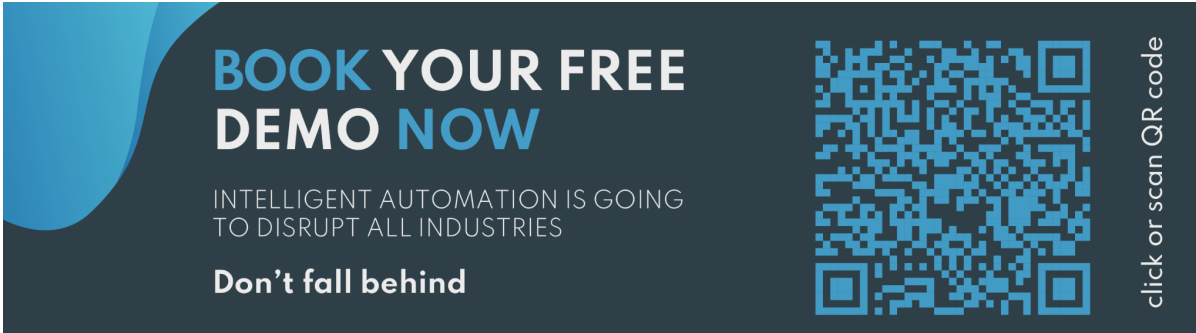
Solution

Modular and flexible product.

The implemented solution was a blend of process consultancy - which allowed us to identify what activities were easier to automate - and operational and technical activities, including the installation of the product in its CORPORATE version and the design of the flows according to the initial strategic proposal.

Perks

- Quick organization and customizable tools for the entire marketing activity (replacing whole vertical integration programs, like Hubspot).
- Flexibility in implementing and changing applications and systems.
- Low impact on effort in terms of involved human resources.
- Startup's native digitization and predisposition to the scale-up stage.

Problem

05.

AUTOMOTIVE INSURANCE SOFTWARE PROVIDER OCTO

Octo Telematics is a multinational company working in the field of telematics. It provides data collection and analysis services to insurance companies, allowing them to modify their services according to more precise data (claim risks, records of driving behaviour, analysis of individual claims with loss adjusters, etc.).

Market
Telematics – Automotive

Business Units involved

- Customer Care
- Operation

Needs Satisfied

- Automation of requests for the installation of sensor boxes in the final users' cars;
- Synch of data relative to the box installation among the suppliers', the customers' - insurance companies - and the workshops' platforms.
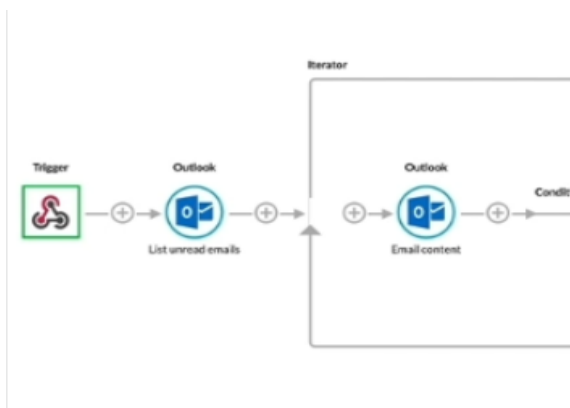
Short description of the flow

- Request for ticket opening about installing the box on the vehicle;
- Compilation and update of several DBs to synchronize the different BUs involved - insurance and workshops;
- Segmentation of information to avoid sensitive data breach.

Systems involved in the flow

- Webhook trigger
- Custom web platforms
- Company database
- Notification systems (apps, emalis).

FLOW RENDERING

DETAILED FLOW DESCRIPTION

Problem
Multiple Systems Management & Data Protection

Integration of the operational area's internal systems with the workshops' IT systems.
Synch of gathered and modified information without exposing the customers' sensitive data.

Solution

The solution we provided consists partly in a traditional legacy enterprise and systems integration and partly in cloud integration, both led by Claudio installed in its EXECUTIVE version.

This allowed the customer to utterly automate the information synchronization from the different DBs and to send reports and alerts/notifications to the people in charge.
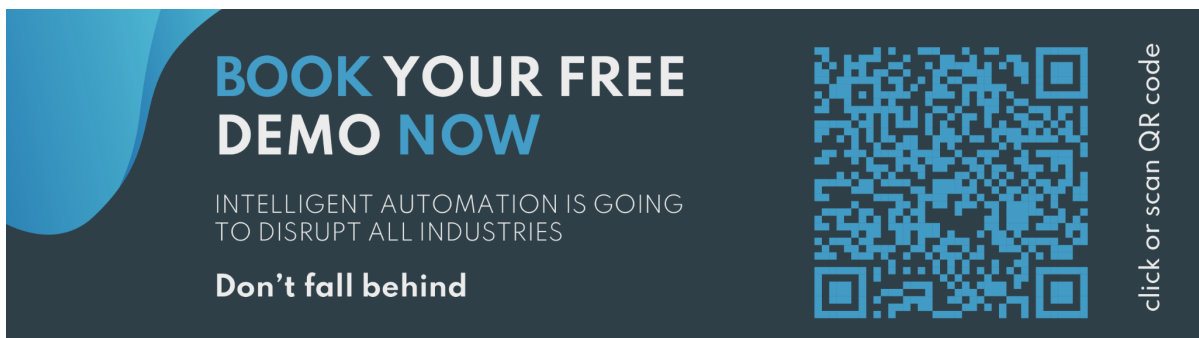
SOLUTION PERKS

- Up to 30% of time saved;
- Limited storing and gathering of sensitive information;
- Changes in the system automation, i.e. harvest of information from the portals, are managed by the customer service without the need for IT support.

PROCESS AFFECTED
DB Query & Update Operations

TARGETED FUNCTIONS
Process Management & IT

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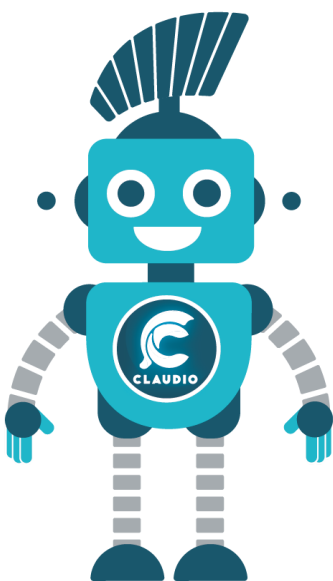
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07.

PRODUCT & COMPANY

Automyo is an Italian startup born as a spin-off from the GreenVulcano Technologies group with an ambitious goal: to collect and strengthen the inheritance left by the IT process automation experts behind the product Claudio.

Claudio is a software integration, connection and automation product designed to support companies in the creation of efficient processes at lower costs. Thanks to its innovative nature, it was awarded by the Boston MITCIO at their Symposium event in 2017.

THE TEAM

Automyo takes advantage of the vast experience the managing board has in the B2B market and IT business offerings. That is why Automyo has been competitive from the very beginning and never ceases to focus on core topics for its target customers.

LUCA ADAMO

Chief Executive Officer

GIANFRANCO IANNELLO

Board

ALFREDO ADAMO

Board

CIRO ROMANO

Board

ALESSANDRO NIGLIO

Advisor

DANIELE BALLARINI

Advisor

DANIELE SUTERA

Front-end Developer

08.

GLOSSARY

Virtual Employee

A virtual employee is a regular employee who works for your business. However, instead of coming into your office or physical location, they provide services remotely.

We here introduce the figure of the Robotic, or Automatic, Virtual Employee: an Automation Tool that works for the company.

Burnout

Burnout is defined as a syndrome resulting from chronic workplace stress that has not been successfully managed. The causes are usually related to:

- Workload
- Perceived lack of control

Knowledge Workers

More than 50 years ago, Peter Drucker predicted information would change the way people work — instead of generating value through physical labor with their muscles, they do it with their minds.

This kind of future worker is the "knowledge worker."

Automation Tool

Software that can replace repetitive processes and that reduce manual intervention. It is employed to set up and repeat instructions, processes, or policies to save time and free up the staff for more strategic work.

It allows to scale a business, provides significant cost savings, and allows staff to focus on strategic activities rather than administrative work.

Automation Flow

We call "automation flow" each automation project inside Claudio's platform. We have two different kinds of automation flows:

1. A preset automation that does not need any work (apart from account setting) to start;

2. A Flow created from scratch using the visual builder of the platform.

Logical Operator

With logical operators, we mean all the nodes that don't get data and information from the outside but that allow to manage information inside the flow (i.e. Hubspot is an Application node, while a Math Operation is a Logical Operator, that makes operations on data previously added in the flow).

Trigger

A Trigger is the condition that starts off automations. Using triggers, we are able to decide exactly how and when actions start.

Triggers in Claudio can be generic (i.e. the scheduler, that allows you choose the specific starting hour) or specific for some action (i.e. Gmail Trigger, that allows you to have your flow start whenever you receive an email).

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