

# airSlate



## How to grow your **MSP** by offering **no-code** workflow automation

# Table of Contents

## **CHAPTER 01: Introduction**

The future is in low-/no-code automation	4
What do MSPs have to offer?	5
What our customer data tells us	6
Scale your MSP with airSlate	7

---

## **CHAPTER 02: Scoping**

Scoping a project around airSlate	10
What is airSlate?	11
Where do you come in?	11
What value can you offer your clients?	12
Who can you serve?	13
How can you identify the first workflow to automate for your client?	14
What does it take to implement airSlate?	15
How much can you make?	16
Tying it all together: airSlate + faculty contract use case	21

---

## **CHAPTER 03: Land & Expand**

Going beyond the first automated workflow	27
Optimizing your client's workflows	28
Identifying new workflows	29
Identifying other teams in need of automation	30

---

Conclusion	31
------------	----

## Chapter 01



# Introduction

# The future is in low-/no-code automation

The future of business is intimately tied to the adoption of automation. By leveraging automation, companies are becoming more agile, improving their efficiency, and reducing costs. And this says nothing of the improvements to customer satisfaction and the employee experience. Without leveraging the possibilities of automation, companies across all industries will start to fall behind—and may already be.



# 70%

of respondents said their organizations were at minimum piloting automation technologies

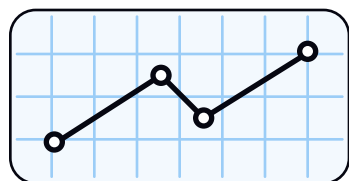
**McKinsey & Company**

It comes as no surprise then that more than 70 percent of respondents in [a McKinsey Global Survey](#) said their organizations were at minimum piloting automation technologies. Business leaders are taking action to bring automation into the fold of their businesses today.

Opportunities abound in the automation space, including for Managed Service Providers (MSPs), who are well positioned to capitalize on the momentum. The foremost question is:

How do you, as an MSP, narrow down which automation is the most lucrative to build a service business around?

The answer is low-code/no-code automation.



# 55%

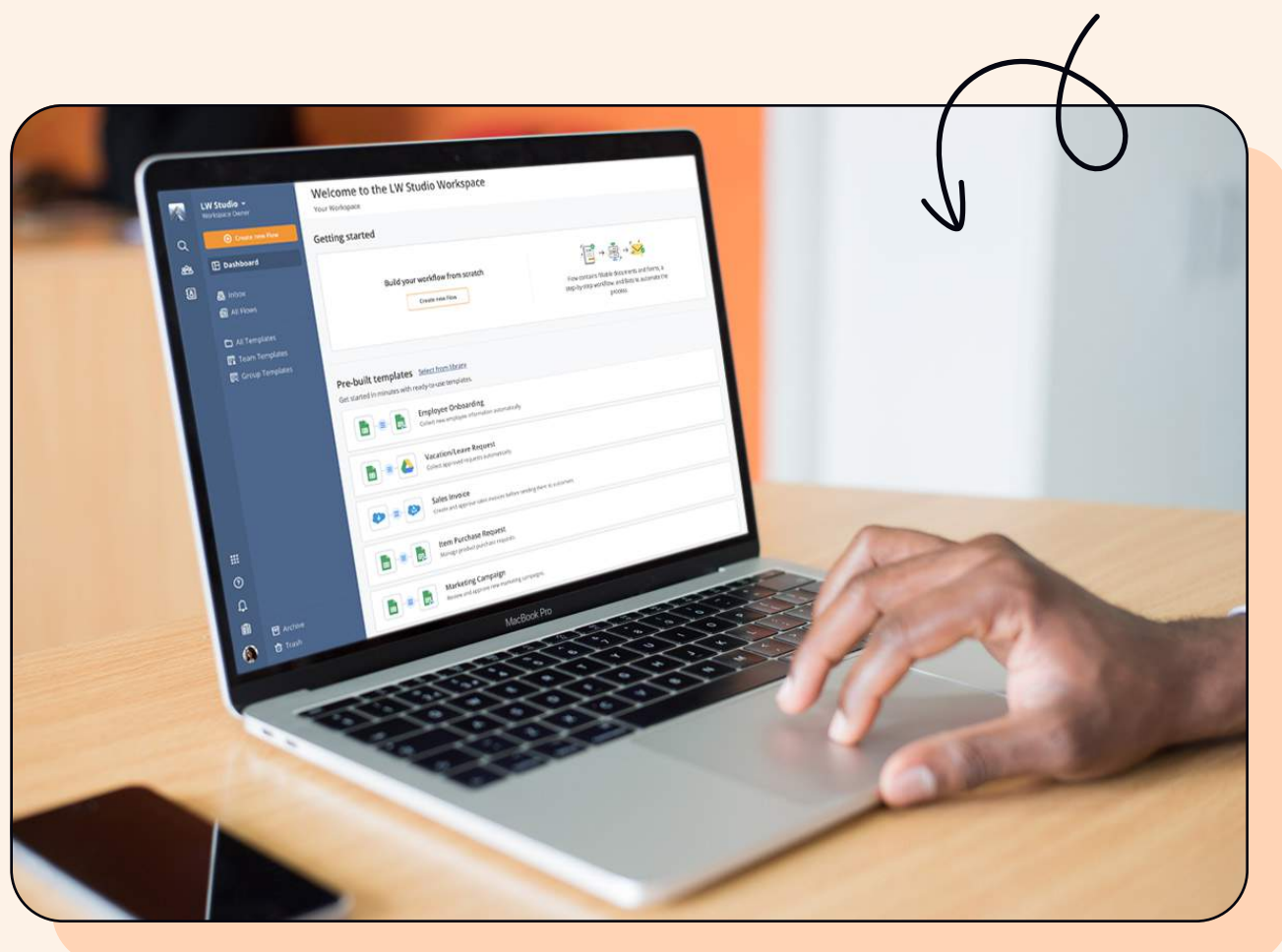
Low-code application platforms growth by 2024 according to Gartner report.

**Gartner**

Automation technologies run the gamut, but there is a particular opportunity right now for MSPs in low-code application platforms, a market which [Gartner projects](#) to grow 55% by 2024. These platforms, which include no-code solutions, are expected to capture \$12 billion in revenue in 2024 alone.

# What do **MSPs** have to offer?

The low-code/no-code automation market is a unique one, as it is bringing sophisticated automation to the mid-market and SMBs. Traditionally, only enterprise companies were equipped with the engineers and developers needed to build automation solutions for a company's unique needs. Now, small and mid-size companies can also reap the benefits of automation from the flexible low-/no-code automation solutions that are designed for this sector of the market.

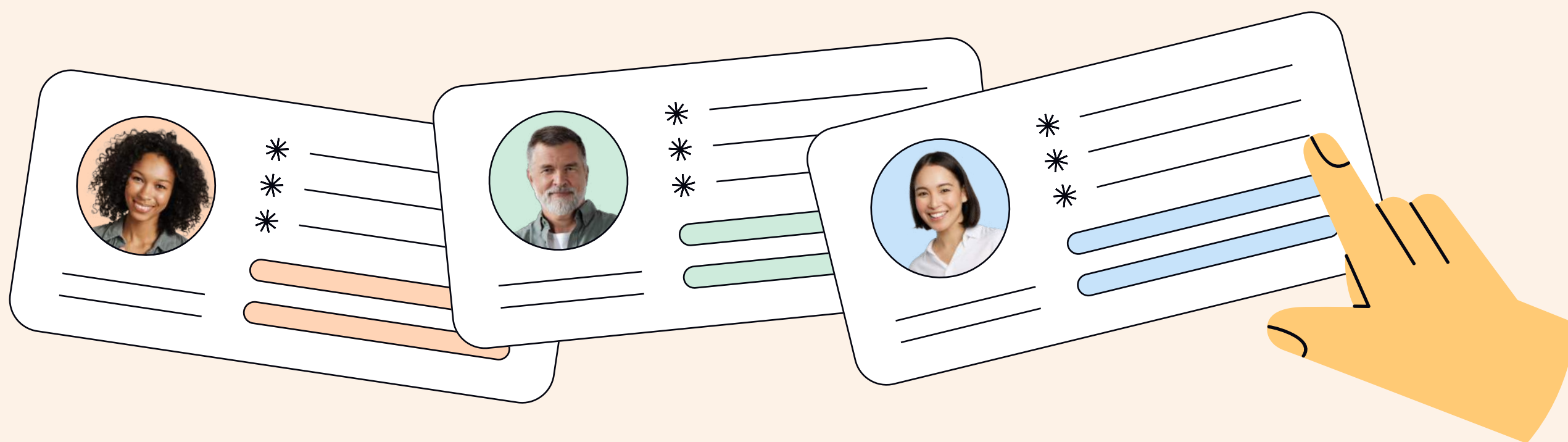


These solutions require little to no technical expertise to set up, can be applied to a range of industries and processes, and won't break the bank. All of these factors, in addition to the significant benefits of automation, are increasing the demand for low-/no-code automation solutions, making it a compelling technology with which to grow your MSP business.

And just because a solution is low-/no-code does not mean companies are willing and able to deploy the solution without support. In addition to selling licenses, you can provide deployment services to offload your clients from needing to train someone internally to build and optimize the solution. Many companies prefer to outsource this work to an expert to ensure they see the ROI of the solution faster.



MSPs stand to benefit greatly by **expanding their business** with new solutions, increasing the margins as automation specialists **focused on no-code solutions**, and penetrating the mid-market via automation.



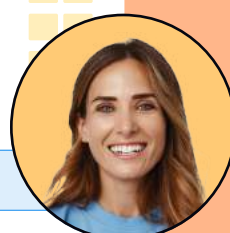
## What our **customer** data tells us

Within the low-/no-code automation world, there are ranging solutions for ranging business challenges. There is a particular demand for intelligent document management and processing tools. According to the McKinsey survey, these are the most commonly utilized automation technologies today.

At airSlate, where we specialize in no-code document workflow automation, we've seen this demand first-hand — and have a good understanding of why it exists.

1. Supervisor's management and assistance
2. Crew's Punctuality
3. How would you rate the quality of our product
4. Staff's professionalism and aptitude
5. Completion of job without breakage/damage
6. Neatness & Clearance of debris
7. Was the job done accurately?
8. How will you rate our overall quality of our packing and moving?
9. How would you like to recommend us to others?

Signature  Date



**Project Proposal**

This Project Proposal and the pricing and schedule data provided herein assumes the following:

- a. Mutually acceptable terms and conditions will be negotiated between [Client company] and [Sender company], which will govern the work to be performed.
- b. All relevant staff of [Client company] will be accessible throughout project.
- c. [Sender company] personnel will have remote access to the on-premise infrastructure for the duration of the project.

If you wish to move forward with the project as it described in this proposal, simply sign below

*John*

Draw with your mouse or finger

**Onboarding Form**

We're so excited to get you set up on! This form will cover all of the information needed to ensure your account is set up properly.

If you have any questions as you complete the form please email us at support@mail.com. You may resume your progress at any time and come back to us later.

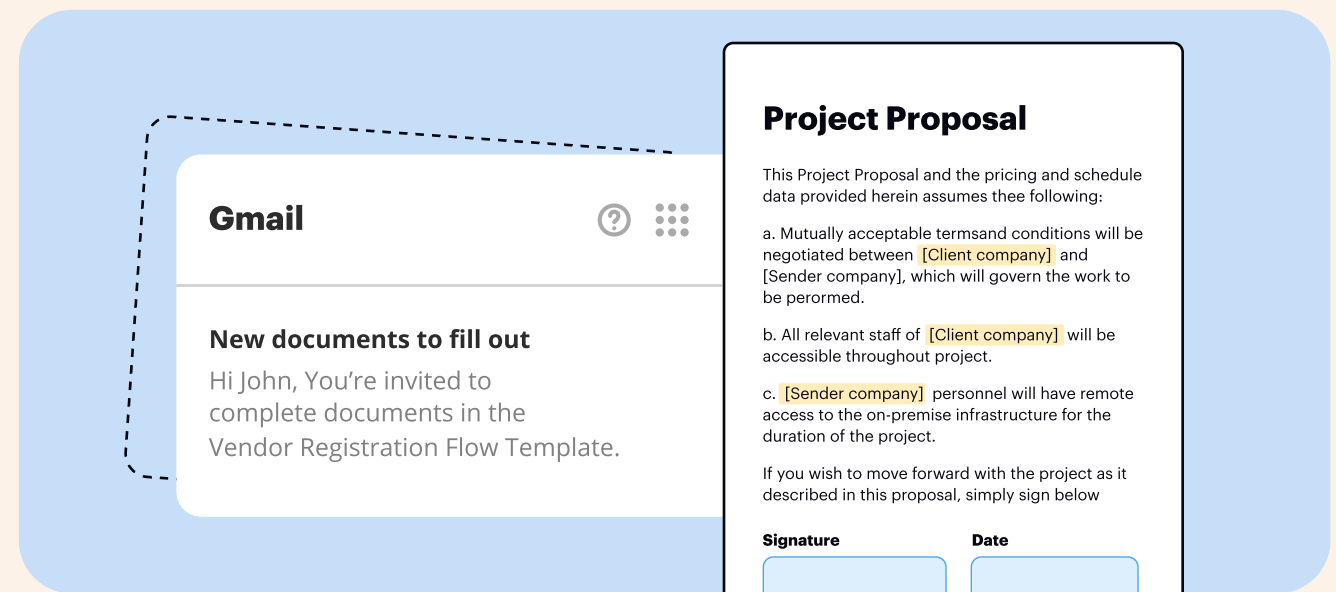
During the onboarding process we'll need to have representatives from your IT and Finance departments. We'll work with your IT team to ensure all equipment is configured properly and we will be needed to set up billing for your Post (shipping account).

Signature *John* Date 08/25/2023

Documents are the cornerstone of almost all businesses, yet they require a significant amount of resources **to create, complete, and manage**. The invention of the eSignature was a huge step forward in digitizing documents. Our own eSignature product, **signNow**, has been transformative for **28 million users**.

When we analyzed their user behavior, we saw that they needed more than the ability to digitize a wet signature. **We began to identify trends** from understanding the processes that surround their eSignatures — how documents are created, who needs to sign them and in what order, what systems the data is pulled from and saved to, and so on.

Through our customers, we concluded that the market was demanding more from technology and from us. This is what led us to create **airSlate**, a solution that empowers people to automate their entire document workflow and integrate their tools easily into a **single system**.



## Scale your MSP with airSlate

---

**As an MSP**, you typically sell professional IT services to clients, equipping them with hardware and servers, and ensuring their security and compliance practices are strong and up-to-date. **You are a trusted advisor to your clients**, helping to solve any tech issues they come across.

---

As you think of ways to expand your business and, importantly, grow your recurring revenue, you may be looking for additional solutions and services to offer your clients. Reselling and implementing airSlate, a no-code solution that empowers your clients to create, integrate, and automate their entire document workflows, is a savvy choice for several reasons.

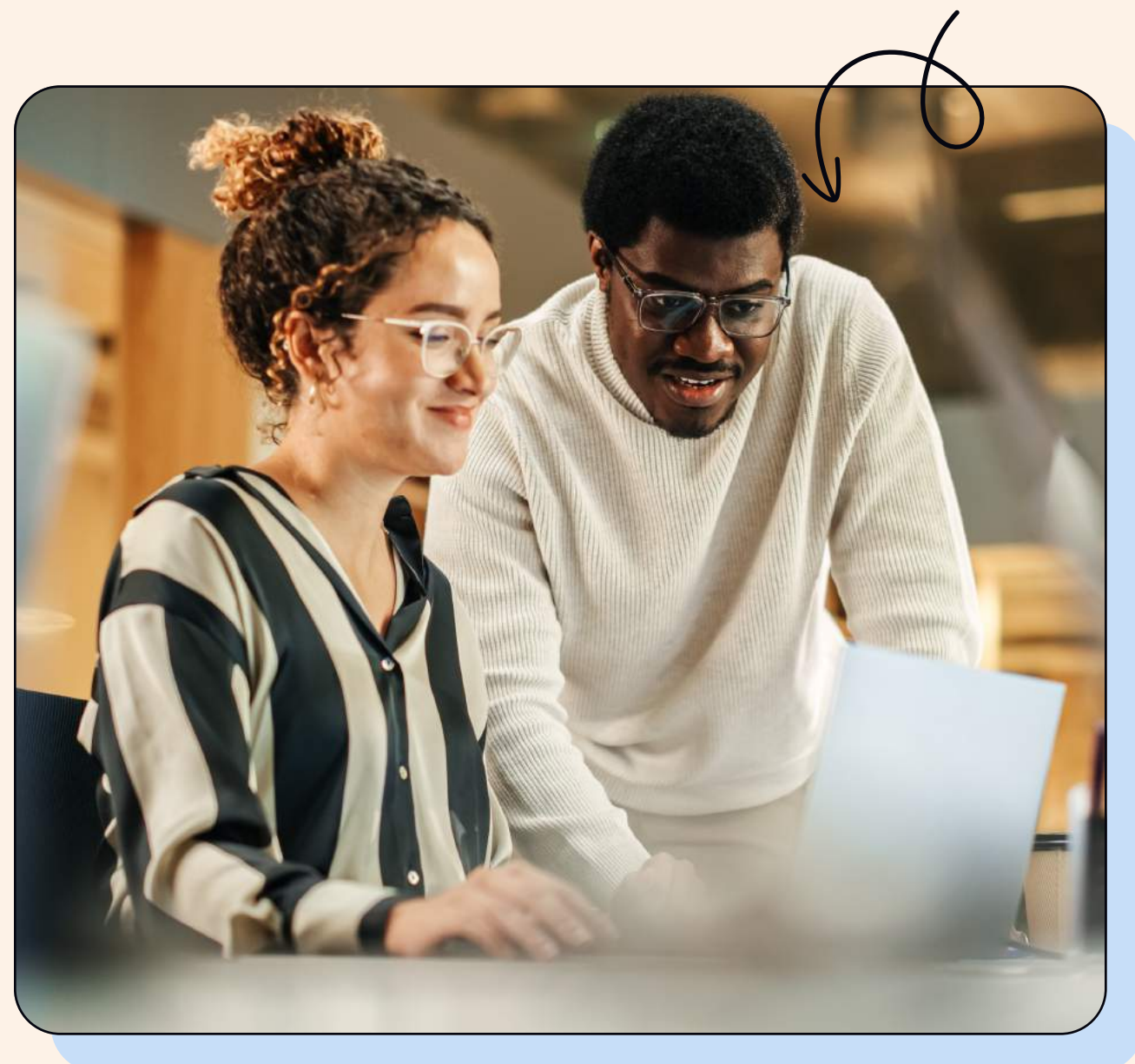
To start, airSlate has a high degree of differentiation in the market and is sticky, both characteristics that are often lacking in an MSP's offerings. When selling cybersecurity solutions, for example, competition abounds and it is a challenge to distinguish your offerings over others. When selling hardware and established brands like Microsoft, margins are extremely low and revenue quickly runs dry after installation.

---

Adding a new line of business around airSlate would **expand your revenue** and your margins. It is a no-code automation solution that requires little effort to learn while offering significant value to your clients. Because the benefits of the solution become clear so quickly, and businesses have an endless list of document processes that can be automated with airSlate, there is always an opportunity to expand your client relationship. Increasing your margins in such a way will usher your MSP business into a new era and **set you up to be a powerful competitor** in your industry.

---

**And remember, as an MSP, you are the best partner your clients** can have on their digital transformation journey through automation. We know, and the data confirms, that automation is becoming integral to every business and its importance will only increase in the years ahead. With your deep knowledge of your client's business processes, pain points, and optimization needs, you can easily assess and guide them towards a strategic automation plan that benefits both you and your client financially and operationally.



**In this playbook, you will learn how to build an MSP around airSlate** — from the ins and outs of scoping an airSlate project to tactics for expanding your services after the solution is deployed.

**Dive into the no-code** automation world and discover new lucrative ways **to grow your business.**



## Chapter 02



# Scoping

# Scoping a project around airSlate

What does building an MSP around a no-code solution look like? In this section, you will learn how to scope a project around airSlate, a no-code solution for automating document workflows, in order to turn your talent and time into billable hours that expand your market reach and grow your business.

## What you'll learn in this section:



**01**

What is airSlate?

**02**

Where do you come in?

**03**

What value can you offer your clients?

**04**

Who can you serve?

**05**

How can you identify the first workflow to automate for your client?

**06**

What does it take to implement airSlate?

**07**

How much can you make?

**08**

Tying it all together: airSlate + faculty contract use case

# What is airSlate?

airSlate is a no-code automation solution that empowers people to automate their entire document workflows and integrate their tools easily into a single system. From simple tasks like editing PDFs to creating forms to eSigning, the solution gives your clients everything they need to build, create, integrate, and automate their documents workflows and get their documents done.



---

With **automated** document workflows, businesses streamline their processes, **maximize** available resources, and ultimately **cut costs** across the board while mitigating human error and **improving overall accuracy**.

---

## Where do you come in?

Although airSlate does not require coding experience to implement and use it, a company still needs to dedicate resources to deploy and maintain the solution. By offering your services, you can ensure your client:

01.

Saves time and internal human resources for critical projects instead of for training and building airSlate

02.

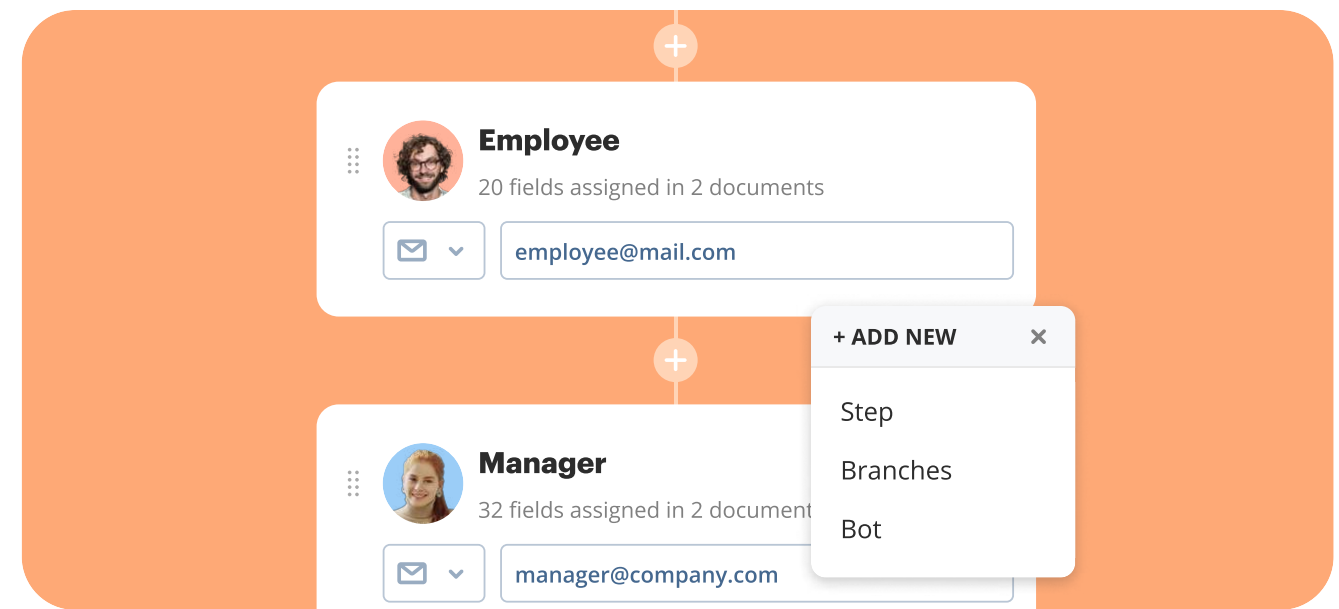
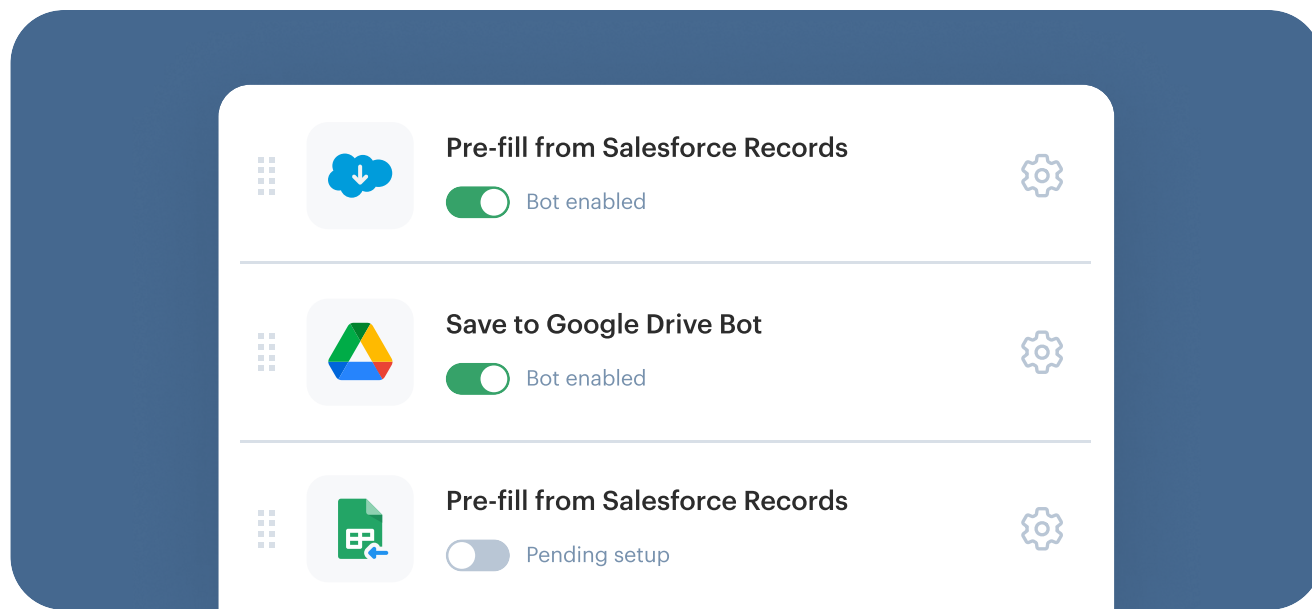
Deploys airSlate quickly and efficiently regardless of competing internal priorities

03.

Has a dedicated expert to help them get the most out of airSlate from Day 1

# What value can you offer your clients?

Key benefits to automating document workflows with airSlate

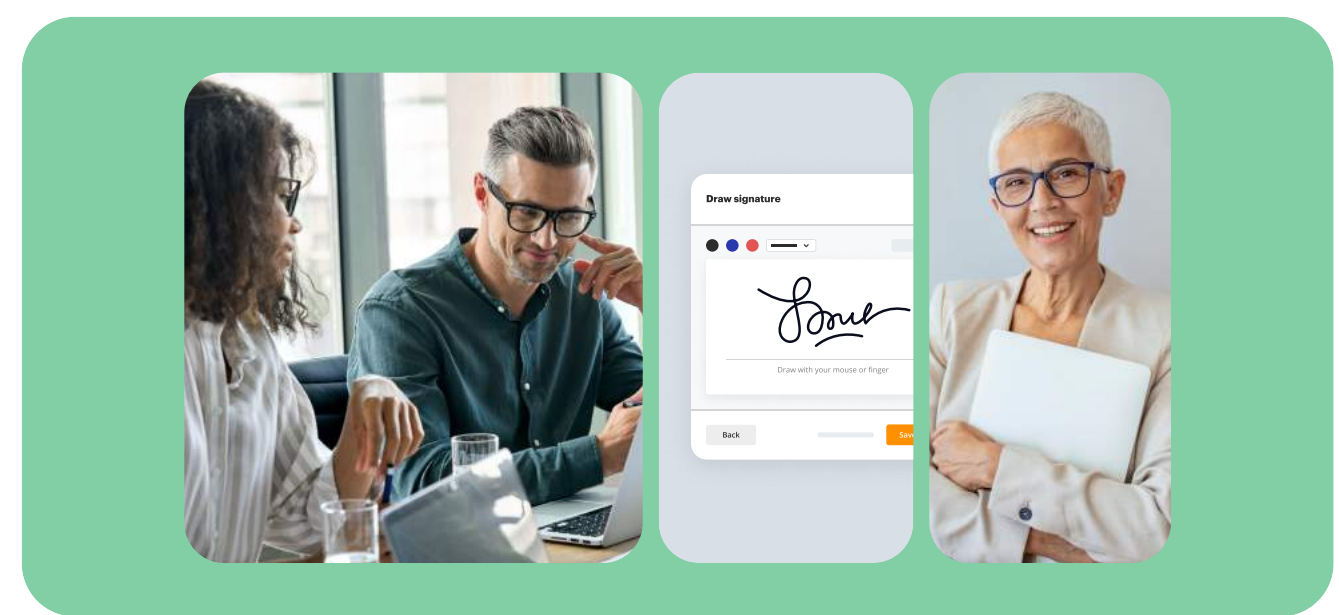
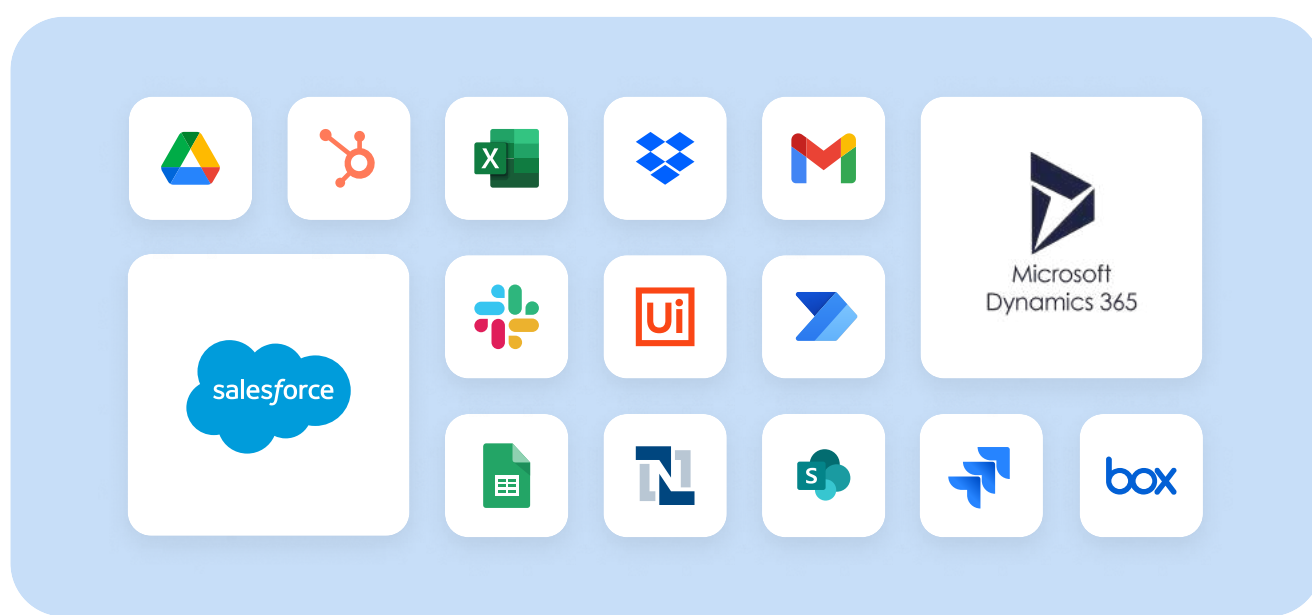


## Reclaiming working hours spent on manual tasks

Hundreds of pre-programmed Bots put manual activities on autopilot. Users can offload work like creating/updating records, pre-filling documents, exporting results, and notifying stakeholders of a document's status.

## Simplifying with a single, all-in-one solution

airSlate is a comprehensive solution that moves users away from stitching together different specialized tools. Users can implement document workflow automation from start to finish with multiple integrations, document editing/completion, eSignature, and more, all in one platform.



## Streamlining your workflows with a natively multi-cloud solution

airSlate helps businesses effortlessly navigate the complexity of document workflows by providing seamless integration options with cloud apps like CRMs (e.g. Salesforce), ERPs (e.g. NetSuite), and cloud storage sites (e.g. Google suite, Box, Sharepoint).

## Increasing your team's productivity and efficiency

Users can eliminate routine tasks and allow their employees to focus on strategic initiatives while automating workflows that are repeatable and scale.

# Processes airSlate customers frequently automate

**Sales Contracts**

**PURCHASE AGREEMENT**

Bill to: \_\_\_\_\_ Ship to: \_\_\_\_\_  
Name \_\_\_\_\_ Name \_\_\_\_\_  
Address \_\_\_\_\_ Address \_\_\_\_\_

Item	Description	QTY	Price	Total
#1				
#2				

**Employee Onboarding**

**NEW EMPLOYEE CHECKLIST**

Employee information  
Name \_\_\_\_\_ Start date \_\_\_\_\_  
Position \_\_\_\_\_ Manager \_\_\_\_\_

Position information

- Introductions to team
- Review initial job assignments and training plans
- Review job description and performance expectations and standards

**Purchase Requests**

**PURCHASE ORDER REQUEST FORM**

Req. No. \_\_\_\_\_ Purchase Order No. \_\_\_\_\_  
Account No. \_\_\_\_\_ Account Name \_\_\_\_\_  
Name \_\_\_\_\_ Email \_\_\_\_\_  
Phone Number \_\_\_\_\_ Date \_\_\_\_\_

No.	Description	Quantity	Unit	Price	Total

**Patient Intake**

**PATIENT INTAKE FORM**

Patient Data  
First Name \_\_\_\_\_ Last Name \_\_\_\_\_  
Date of Birth \_\_\_\_\_ Address \_\_\_\_\_

Insurance information  
Insurance Carrier \_\_\_\_\_ Insurance Plan \_\_\_\_\_  
Contact Number \_\_\_\_\_ Policy Number \_\_\_\_\_

## Who can you serve?

airSlate pays dividends for SMB and mid-market clients (companies of approximately 10-2000 employees) across industries and business functions.

### Top industries

- ✓ Education
- ✓ Banking & Financial services
- ✓ Healthcare
- ✓ State & Local government
- ✓ Insurance
- ✓ Construction
- ✓ Real Estate

### Top teams

- ✓ Operations
- ✓ Sales Ops
- ✓ IT & Security
- ✓ HR
- ✓ Legal
- ✓ Marketing
- ✓ Finance & Accounting

# How can you identify the first workflow to automate for your client?

To ensure your clients see a positive ROI after launching their first automated workflow, guide them as they work to identify it. The questions below will help you understand their process more deeply, the challenges the process creates, and the impact automating this process can have on your client's day-to-day and overall business.



## SITUATION

- ? Take me through you/your users process for creating that document?
- ? What information goes into the documents? Is it stored in a CRM or a database?
- ? What happens with the document and the data in it after it is complete?
- ? What data security or compliance standards are relevant?
- ? Can you please describe your ideal workflow?



## PAIN

- ? How much time are you/your users spending manually creating documents?
- ? How many of these documents require manual intervention?
- ? How many times do you/your users go back and forth on documents (e.g. contracts) with customers? What challenges do they face?
- ? How accurate and complete is the data in your CRM or other system of record?
- ? What is your biggest challenge, according to your users?



## IMPACT

- ? How important is it to shorten your document completion cycle? What would that do for your business?
- ? What impact will having an automatically updated CRM or other system of record have on your job?
- ? What is the business outcome you hope to achieve by automating this document process?

# What does it take to implement airSlate?

There are multiple steps to setting up your client's first workflow. The implementation process will look something like this.

## STAGE 01

### Explore

You and your client meet to discuss the client's challenges and goals. This stage is made up of 1-3 meetings (depending on the complexity of the process you are automating) where you will:

- Align on the process to automate
- Develop a thorough understanding of the process and goals of the automated workflow (using questions in previous section)
- Define the business outcomes that the automated workflow will help achieve

## STAGE 02

### Enable

You and your client determine the scope and timing of the project. This stage is made up of 1 meeting and asynchronous communication with your customer. You will:

- Guide your client to have major requirements completed, like locating the documents involved in the process, creating an outline of their desired process, and installing airSlate's integration package
- Hold a kick-off meeting to review the documentation of the desired process and align on next steps

## STAGE 3

### Build

You develop and test your client's first automated workflow, and your client prepares internally for launch. This stage is made up mostly of your working sessions to build the workflow. You will:

- Guide your client to have major requirements completed before building, like setting up "Teams" in airSlate and assigning responsibilities internally for managing the implementation and upkeep of the automated workflow
- Complete working sessions to build the workflow
- Soft-launch the workflow and make adjustments as needed



### Go Live!

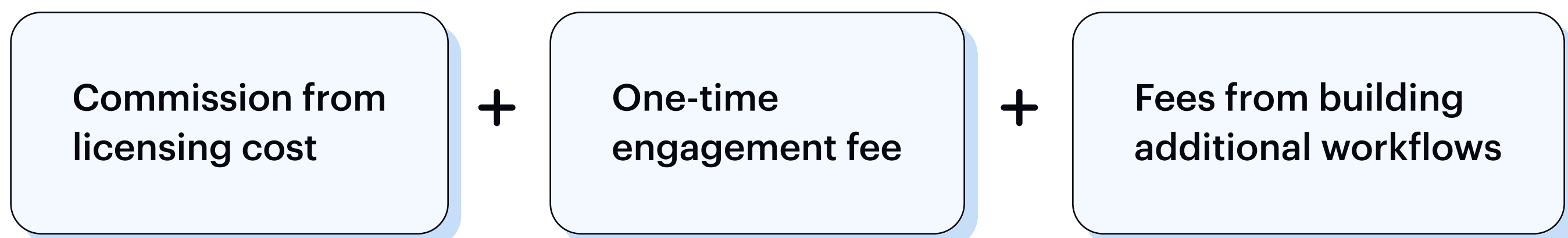
You and your client will launch their first automated workflow in airSlate! At this stage, the heavy lifting is done and your client can start reaping the benefits of the automation in action.



## How much can you make?

The revenue you will make from automating your clients' processes with airSlate will be a combination of reselling airSlate (your ongoing site license commission) and directly selling your professional services (your one-time engagement fee and fees from building additional workflows).

### Calculating how much you'll make



### Site License Commission

We understand the difference recurring revenue can make for your MSP. By selling airSlate, you will generate recurring revenue via site licenses. **You will earn between 20-40% of the licensing cost per client**, which you can count on regardless of whether or not you are actively providing direct services to your client at any given time.

Your commission is paid monthly, and will **at minimum start at \$1,000 a year per customer** and automated workflow. You can impact the upper end of the commission range by working with clients in highly regulated industries that have a high volume of documents to be sent and signed; clients with processes that require multiple integrations with other systems; and clients with processes that require multiple Bots. Volume, integration, and Bots actions all correlate to a higher licensing cost and, in turn, more revenue for you.

**And remember**, your commission-based revenue is not necessarily a static sum: As your clients increase their use of airSlate and purchase larger packages, your revenue will grow.



## One-Time Engagement Fee

Successful MSPs charge their clients a one-time engagement fee when automating their first workflow. This fee is a reflection of the value airSlate and your services will provide your client, and takes into account the amount your client can expect to save per Flow, the number of times their Flow runs per month, and the target payback period.



### Note

A Flow in airSlate refers to a one-time business process that is made up of fillable documents/forms and a series of steps, and is automated by airSlate Bots. Every time, for example, a sales rep creates a contract and sends it to be signed or a patient completes intake forms at a doctor's appointment, a singular Flow is running.

Based on our experience deploying airSlate to clients of ranging sizes, here are our suggested engagement fees for clients based on their size/revenue.

Size of Company	Engagement Fee
Small business	\$15,000
Medium-sized business	\$25,000
Enterprise business	\$50,000

## Client ROI

To understand the value you are bringing to your clients, take a look at the following chart, which outlines how quickly your clients will see their ROI. The payback period is based on the number of Flows they're sending per year, the cost of their license and engagement fee, and their yearly cost savings.



To make this more concrete, let's assume your client is a **medical clinic** that has hired you to automate their patient intake form.

Every month, each physician sees roughly **440 patients** and every patient must complete an intake form (each corresponding to one Flow).

**By automating this process**, the office administrator, who makes \$25/hour, is spared 15 minutes of work per patient, meaning **your client is saving \$6.25** per Flow.

Clinic size (# of physicians)	One-time engagement fee	Flows/year	Bot actions/year (3/Flow)	Bot usage cost/year	Cost savings/year	Payback period (months)
4	\$15,000	21,120	63,360	\$31,680	\$132,000	4
8	\$25,000	63,360	190,080	\$95,040	\$396,000	4
12	\$50,000	105,600	316,800	\$158,400	\$660,000	4

*Costs and savings reflect the first year of your client's engagement*

# Calculating Your Net Profit

## MSP Revenue

Here is an overview of the revenue you can expect to make in your first three years of selling and implementing airSlate to this client.

airSlate is sold via pricing packages that give customers bulk amounts of Bot actions. Customers will likely buy airSlate pricing packages that exceed their Bot action needs, which means your license commission will exceed the commission you would earn if the solution was sold strictly via Bot usage.

The following chart calculates the licensing cost and your corresponding commission based on your medical client's Bot usage, rather than via airSlate pricing packages, to give you a sense of the baseline for your possible commission revenue. Year 1 includes your one-time engagement fee and Years 1-3 include your yearly 20% site license commission.

Clinic size (# of physicians)	Year 1	Year 2	Year 3	Total
4	\$21,336	\$6,336	\$6,336	<b>\$34,008</b>
8	\$44,008	\$19,008	\$19,008	<b>\$82,024</b>
12	\$81,680	\$31,680	\$31,680	<b>\$145,040</b>

## MSP Cost

Below is a breakdown of the costs you will accrue while implementing airSlate and supporting your clients through the use and optimization of the solution. The chart assumes the cost of your labor to be \$180/hour.

	Year 1	Year 2	Year 3	Total / first 3 years)
Implementation*	\$1,800	\$0	\$0	<b>\$1,800</b>
Support**	\$5,600	\$2,800	\$2,800	<b>\$11,200</b>
Total/year	\$7,400	\$2,800	\$2,800	<b>\$13,000</b>

\*Initial implementation: 10 hours

\*\*Support: 28 hour/Year 1; 14 hours/Years 2&3

These are approximations based on our experience.

## Net Profit

Now that you understand your revenue and costs over the first three years, let's calculate your net profit. Each year's column reflects your yearly revenue minus the total costs of that year, and the totals of each row reflect your total revenue for Years 1-3 minus the total costs of those three years.



Clinic size (# of physicians)	Year 1	Year 2	Year 3	Total
4	\$13,936	\$3,536	\$3,536	<b>\$21,808</b>
8	\$36,608	\$16,208	\$16,208	<b>\$69,024</b>
12	\$74,280	\$28,880	\$28,880	<b>\$132,040</b>

## Extra Revenue via Additional Workflows: Monetizing Your Time

After launching your client's first workflow, you can continue making money by charging them hourly for each additional workflow you automate.

The following chart outlines how much you will make when charging an hourly rate of \$180 and is organized by the complexity of the workflow.

Workflow components	Time to complete	Amount you can make
eSignature and no Bot automation (simple processes)	~30 minutes - 2 hours	<b>\$180-\$360</b>
eSignature and Bot automation (moderately complex processes)	~6 hours	<b>\$1,080</b>
CRM/ERP integrations and/or doc generation via Bot automation (complex processes)	~12 hours	<b>\$2,160</b>

This chart represents your revenue **for a single automated workflow**. Because every client is likely to have several workflows to automate, you can count on making multiples of the dollar amounts listed above, per client.

# Tying it all together: airSlate + faculty contract use case

Now that you understand how to scope a client's project with airSlate, let's take a look at an example use case to see what this will look like in practice. This example, of a higher education client interested in automating their adjunct faculty contract process, will give you a concrete sense of what you'll be able to offer clients as an MSP reselling and implementing airSlate.

Hiring contracts are a part of employee onboarding, the number one process airSlate helps automate. Let's jump in.



## Scenario

Your client is the Academic Affairs office of a university that is hiring approximately 110 adjunct faculty members over the course of a single academic year. Each adjunct must be given a contract ahead of the semester in order to teach.

The current contract process involves the input and approval of at least 5 university staff members and administrators across multiple departments, moving data to and from Salesforce, making corrections to the contract if information is incorrect, hunting down the contract if it hasn't been returned, and more.

This process is one of many projects the Academic Affairs office leads, but it is particularly tedious, taking around 1.5 months from when a department requests a new adjunct contract to when the contract is returned and the university considers the adjunct hired.

## Digging deeper

Using the questions to help identify your client's first workflow, you learned the following:



### SITUATION

- ✓ An adjunct contract is created for each adjunct faculty member via the following steps:
  - **A department** emails Academic Affairs requesting a contract for an adjunct.
  - **Academic Affairs** drafts the contract by copying and pasting the data in the adjunct's Salesforce record. The contract is then printed and sent to the **Dean**.
  - The **Dean** reviews, approves and signs the contract, and then sends it back to **Academic Affairs**.
  - **Academic Affairs** mails the contract to the adjunct to sign. (If there are errors, they redraft the contract and repeat the above steps.)
  - The adjunct mails the completed and signed contract back to the university.
  - **Academic Affairs** scans the completed contract, saves it to the adjunct's Salesforce record, and enters the contract's data into several spreadsheets.
  - **Academic Affairs** emails the departments that need to take action following the adjunct's official hire (e.g. HR for payroll, Marketing to update the website, IT to give them accesses/equipment, etc.).
- ✓ This process, from beginning to end, takes about **1.5 months** to complete per contract.



## PAIN

- ✓ It takes 5 university staff members and administrators about 10 hours to create, approve, mail and file the contract sent to each adjunct.
- ✓ The Academic Affairs team often goes back and forth multiple times with each adjunct, either in an effort to track down an unreturned contract or to address incorrect or missing information. This can delay the completion of the contract by 2-3 weeks.
- ✓ The biggest challenge is simultaneously keeping track of all the contracts that are being created, circulated, and returned, and where they are in the process.



## IMPACT

- ✓ Shortening the contract completion cycle and automating the process will give the Academic Affairs team more time to focus on their important ongoing responsibilities like curriculum development, faculty promotions, and student success initiatives.
- ✓ An organized and smooth contract signing process will positively impact an adjunct's impression of the university.
- ✓ Having updated and accurate Salesforce records and spreadsheets will save the Academic Affairs team and its campus partners from dealing with the fallout of inaccurate information being replicated in other systems, on forms, in legal documents, etc.

# What airSlate can do

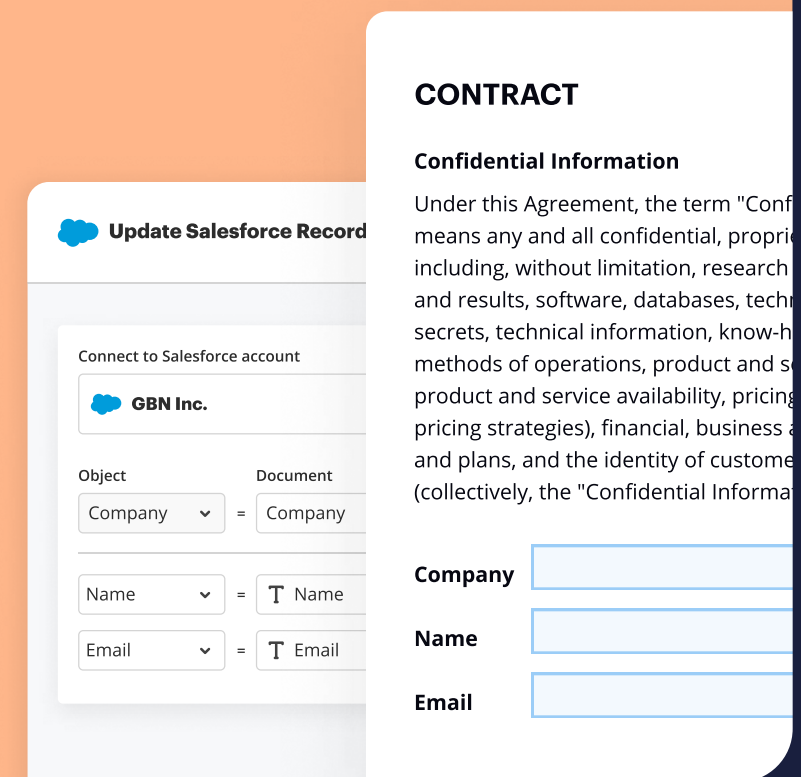
With airSlate, you can automate your client's adjunct contract process from beginning to end, reducing the time it takes to complete these contracts **from 1.5 months to days**. As their airSlate expert, here is what you can set up for airSlate to tackle.

## Kicking-Off the Process

Departments fill out a webform notifying Academic Affairs that a contract is needed for a specific adjunct, along with key details.

## Generating Documents

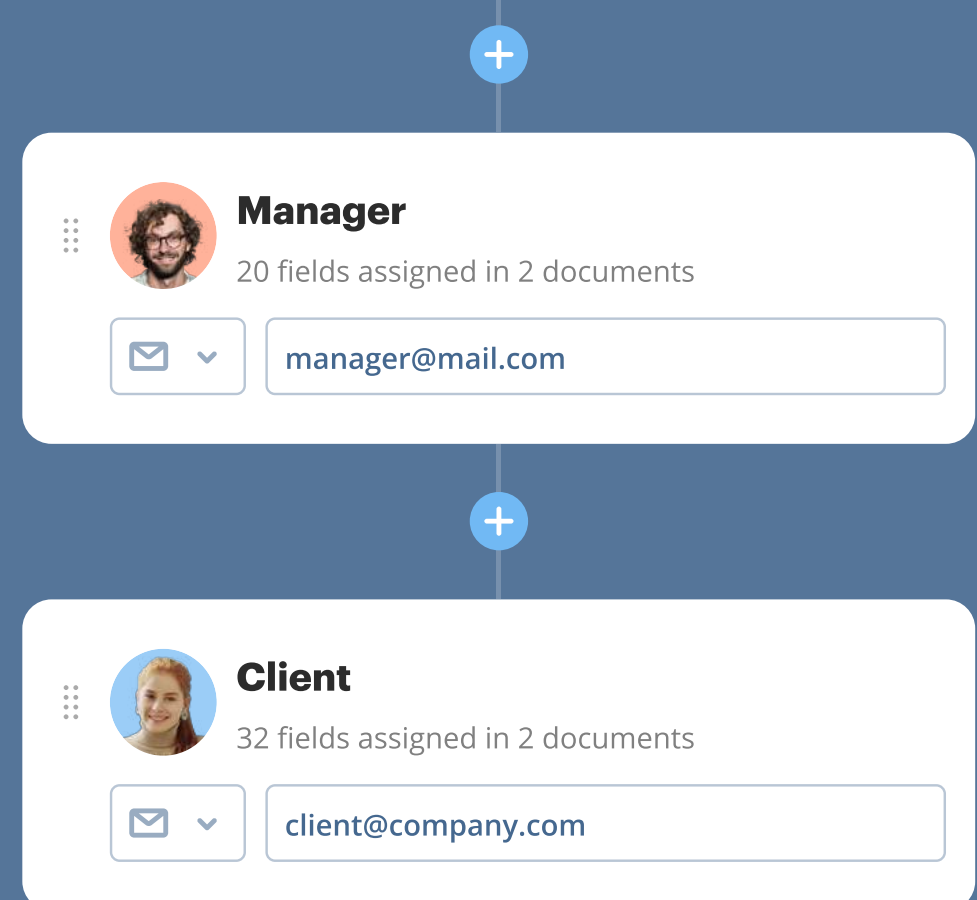
Academic Affairs automatically generates /pre-fills contracts with adjunct data from Salesforce records.



## Routing Documents

Academic Affairs routes the contract to be digitally approved, completed and signed by the Dean and adjunct.

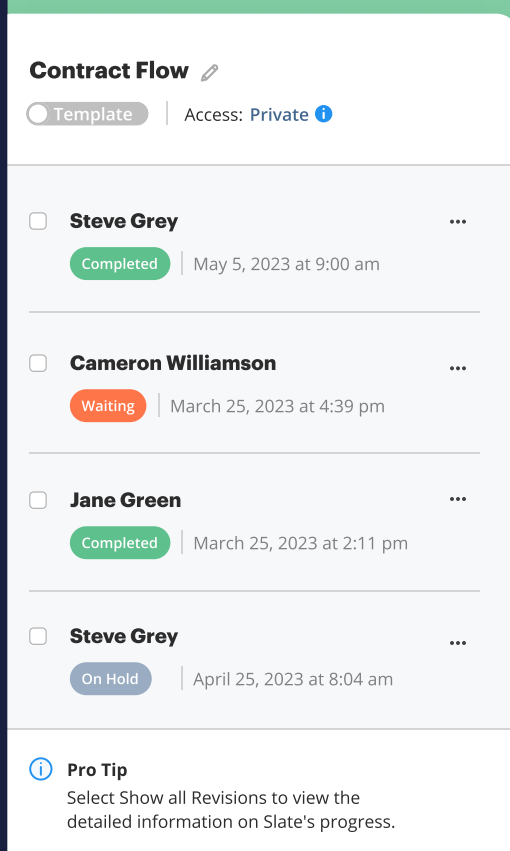
- The contract can be set to be routed to signatories in a specific order and by a specific time.
- Specific conditions can be applied to contract fields so the adjunct adds the correct information and cannot skip required fields.



## Accessing the Doc Journey

Academic Affairs sees where the contract is and if it's been opened/completed.

Departments automatically get notified when the adjunct has completed the contract in order to kick off their own processes.



## Saving Data

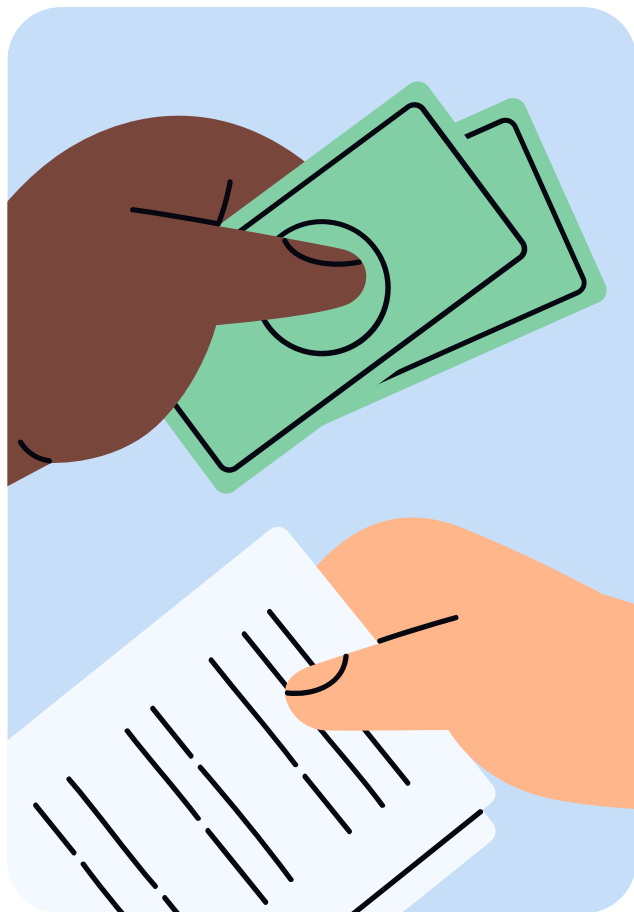
Each contract and its data is saved to the adjunct's Salesforce record.

Contract data is added to specific spreadsheets that archive course, department, and employee data.



# Calculating Revenue

To understand the value you are offering your higher ed client by automating their adjunct contract process, take a look at the chart below, which outlines how quickly the Academic Affairs office will see their ROI.



**Here are the details to keep in mind:** Each year, the university is hiring around 110 adjunct faculty members. Each contract process has a corresponding Flow with 20 associated Bot actions. **By automating this process, 5** university staff members and administrators are spared 10 hours of work total per contract. Their compensation averages out to \$50/hour, which means they will **save \$500 per Flow.**

Additionally, since this process includes several departments yet the processing volume is low, you charge them an engagement fee of \$15,000, the fee typically appropriate for small businesses.

One-time engagement fee	Flows/year	Bot actions/year (20/Flow)	Bot usage cost/year	Cost savings /year	Payback period (months)
\$15,000	110	2,200	\$1,100	\$55,000	3.5

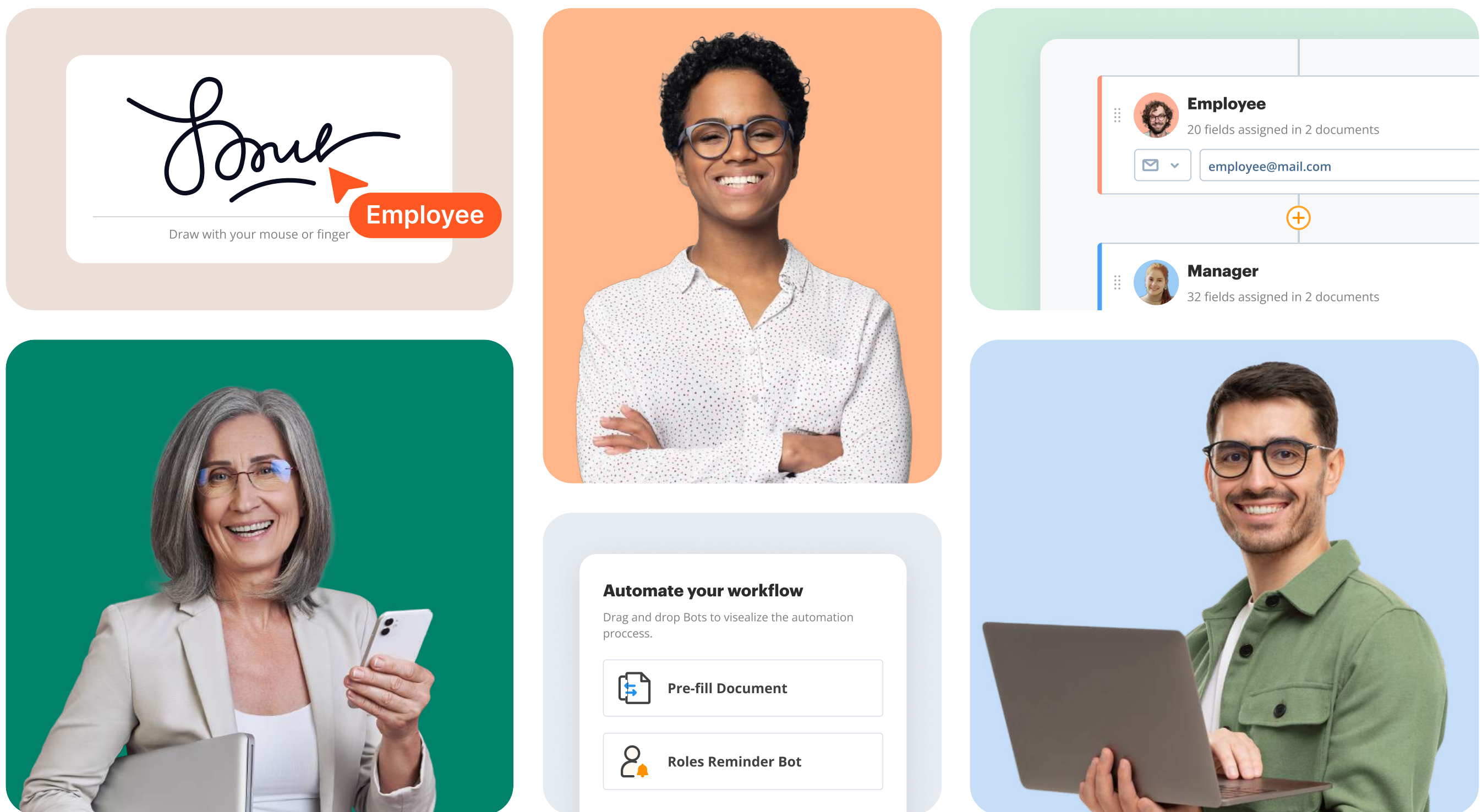
As you can see from the chart above, the ROI for your client is substantial. And note: These calculations do not take into account the intangible benefits of automating this process like giving the Dean back time, shortening the process completion time by weeks, offering adjuncts a smooth onboarding experience, having up-to-date systems of record, and more.

By automating such a critical and draining manual process that is owned by the Academic Affairs office but touches several others, you are proving how much value you can bring to your client and their campus partners quickly and effectively. This will give them confidence in the value of automating more workflows with your help, leading you to opportunities to expand your client engagement.

## Chapter 03



# Land & Expand



## Going beyond the first automated workflow

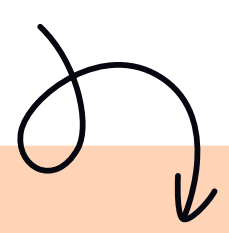
You've built your client's first workflow with airSlate — congratulations! Where do you go from here? There is much more you can offer your clients by way of value and services. This section brings you through our main three suggestions for expanding your client services after the first automated workflow is live.

- 
- ✓ Optimize your clients **airSlate workflows**
  - ✓ Identify **new workflows** to automate in your client's department
  - ✓ **Identify other teams** at your client's organization that could benefit from automation
-

# Optimizing your clients' workflows

After your client's first workflow is up and running, you can continue to serve as their airSlate expert by offering guidance on how they can get the most value out of airSlate.

You will have the tools to review feature usage in order to determine where your clients are utilizing airSlate to its fullest and what features they are underutilizing.



**Bonus:** Even our best users aren't taking advantage of the full power of airSlate.

---

You can serve as their consultant to identify features and implement optimization strategies **to bring them closer to their business goals.**

---

**You will be armed with usage data like:**

# of Templates

# of Bots per Template

Time to create Template

# of complete vs. incomplete Flows

Flow completion rate

# of integrations

# of Bot actions

**Example talk track for faculty contract use case:**



*"I see that you are utilizing a lot of **Flows** but not many **Templates** to complete your adjunct contract process. Do you understand the value of **Templates**? I'm happy to explain it to you. My clients in higher ed save a lot of time using **Templates** instead of creating the same or similar **Flows** every time they need to run a common document process."*

# Identifying new workflows

Another successful tactic to expand your relationship with your existing clients is to identify additional document processes their team or department could benefit from automating. Many times, clients will start using airSlate and identify other applications for it in their day to day on their own.

If they, however, need guidance, start by confirming the value automation is bringing via their current workflow and then pivot to a conversation about additional ways airSlate can bring value to their team or department.

---

Based on their industry or business function within their company, you can offer suggestions for processes airSlate typically automates for similar clients.

---

## Example talk track for **faculty** contract use case:

*“You told me with your **manual process**, it took you hours to create, mail, and file each adjunct contract. Based on your usage data, we can see that you were able to reduce the amount of time it takes to complete these contracts by weeks.*

***Congratulations!** I would love to see what else we can do for you.*

*Clients in higher ed have automated processes like faculty promotions, course evaluations and more. Are you interested in exploring other **document processes to automate?**”*

# Identifying other teams in need of automation



While there are many document processes to automate within your clients team or department, there are even more to automate across your client's organization. This shift moves airSlate from being a departmental platform to an organizational platform and can expand your engagement with your client significantly.

In order to move from one team or department to another, you'll need an introduction and for your client to be an internal advocate.

## Example talk track for **faculty contract** use case:



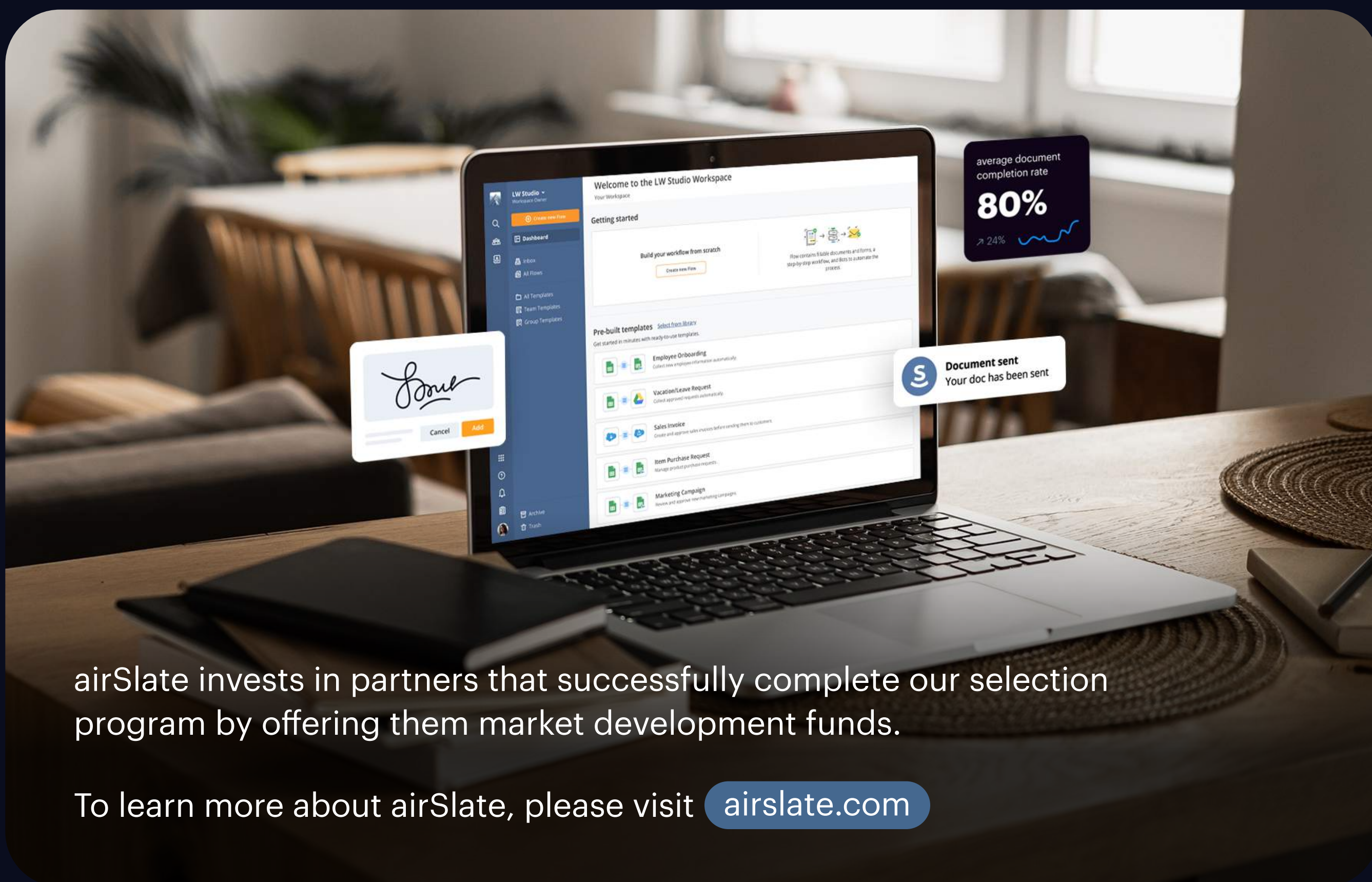
*"Typically Academic Affairs departments care a lot about faculty satisfaction and our other clients have found that simplifying other processes has led to **happier university employees**. One of those processes could be how the university onboards their employees. Our clients who are a part of HR teams typically see the benefit of automating this paperwork-heavy process.*

*Do you think your HR team would be interested in **automating processes for your employees**? Are they aware of the benefits you've seen from your **automated workflows**?"*

# Conclusion

There is much to gain from becoming an MSP for no-code workflow automation, and this playbook shows you how to do it successfully with airSlate.

Register to become an airSlate partner to start growing your business today.



airSlate invests in partners that successfully complete our selection program by offering them market development funds.

To learn more about airSlate, please visit [airslate.com](https://airslate.com)