

How *SMBs* are primed to embrace *automation* and supercharge *productivity*

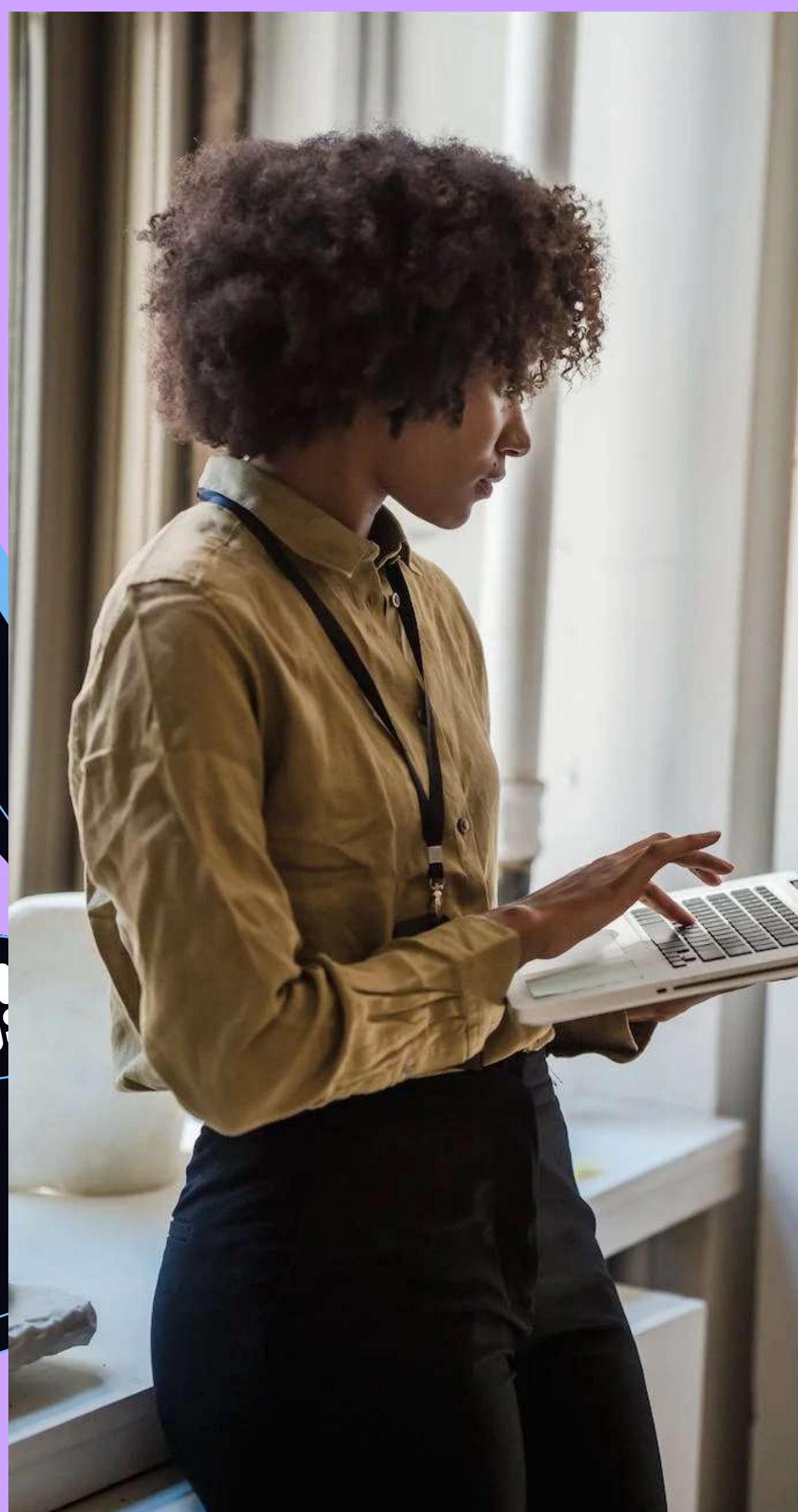
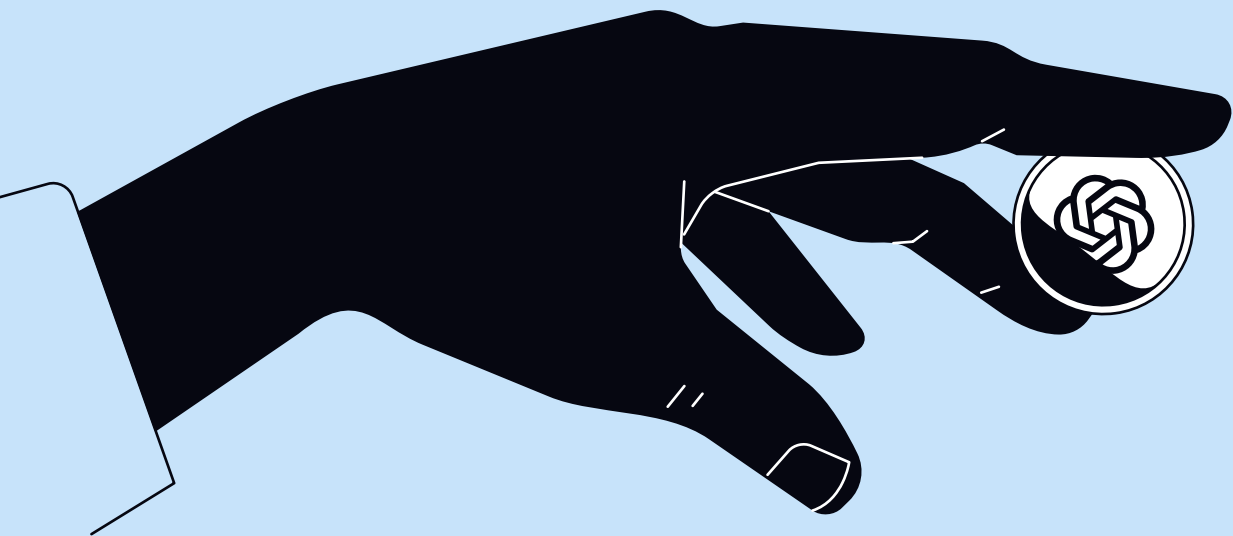


Table of Contents

- 3** **INTRODUCTION**
The small-and-medium business landscape
- 4** **CHAPTER 1**
Who is already using automation?
- 7** **CHAPTER 2**
What kind of automation tools matter and why?
- 11** **CHAPTER 3**
Automation sentiments: Are SMBs truly ready?
- 14** **CHAPTER 4**
Seizing an important opportunity
- 17** **CHAPTER 5**
airSlate: The all-in-one partner in automation

Introduction



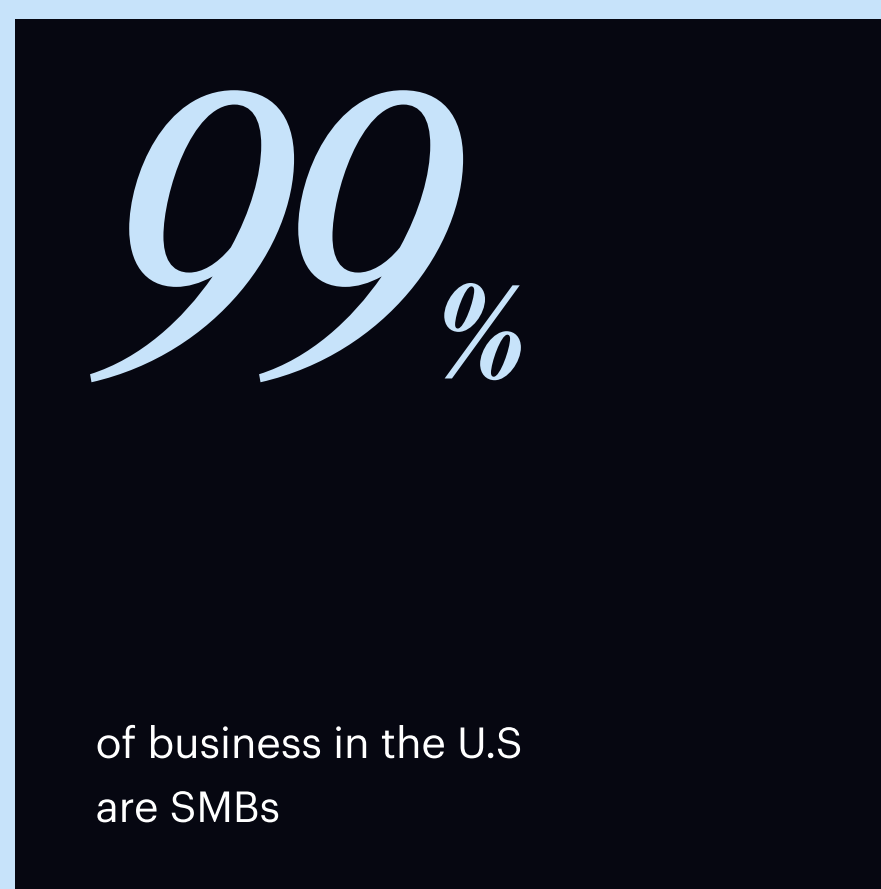
When it comes to technology, it seems all anyone can focus on is automation and AI. With the emergence of artificial intelligence like *ChatGPT*, automation and all its capabilities have taken center stage.

And while we may already feel inundated and overwhelmed with automation articles, information, and tools, we also recognize that automation is not going anywhere. In fact, it is the key to hacking productivity.

Large enterprises typically have an advantage when it comes to emerging and innovative technologies. They are usually well-resourced and have access to budget, talent, and customized tech solutions that help them stay ahead.

Small-and-medium businesses (SMBs) on the other hand tend to be resource-constrained and have a pressing need for purpose-built tech solutions that are cost-effective and can be easily implemented.

More than ever, SMBs understand that they need to invest in automation to be able to compete successfully in today's business environment.



In a recent survey of more than 1,000 SMBs conducted by Propeller Insights on behalf of airSlate, we found that SMBs are willing and eager to adopt automation. With an estimated 30 million SMBs in the U.S. alone, finding one's competitive advantage is a must. Furthermore, with SMBs making up over 99% of the businesses in the U.S., they have an extraordinary opportunity to influence the way businesses invest and use automation now and in the future.

How can SMBs invest in the right solutions and become automation trailblazers?

Who is already using automation?

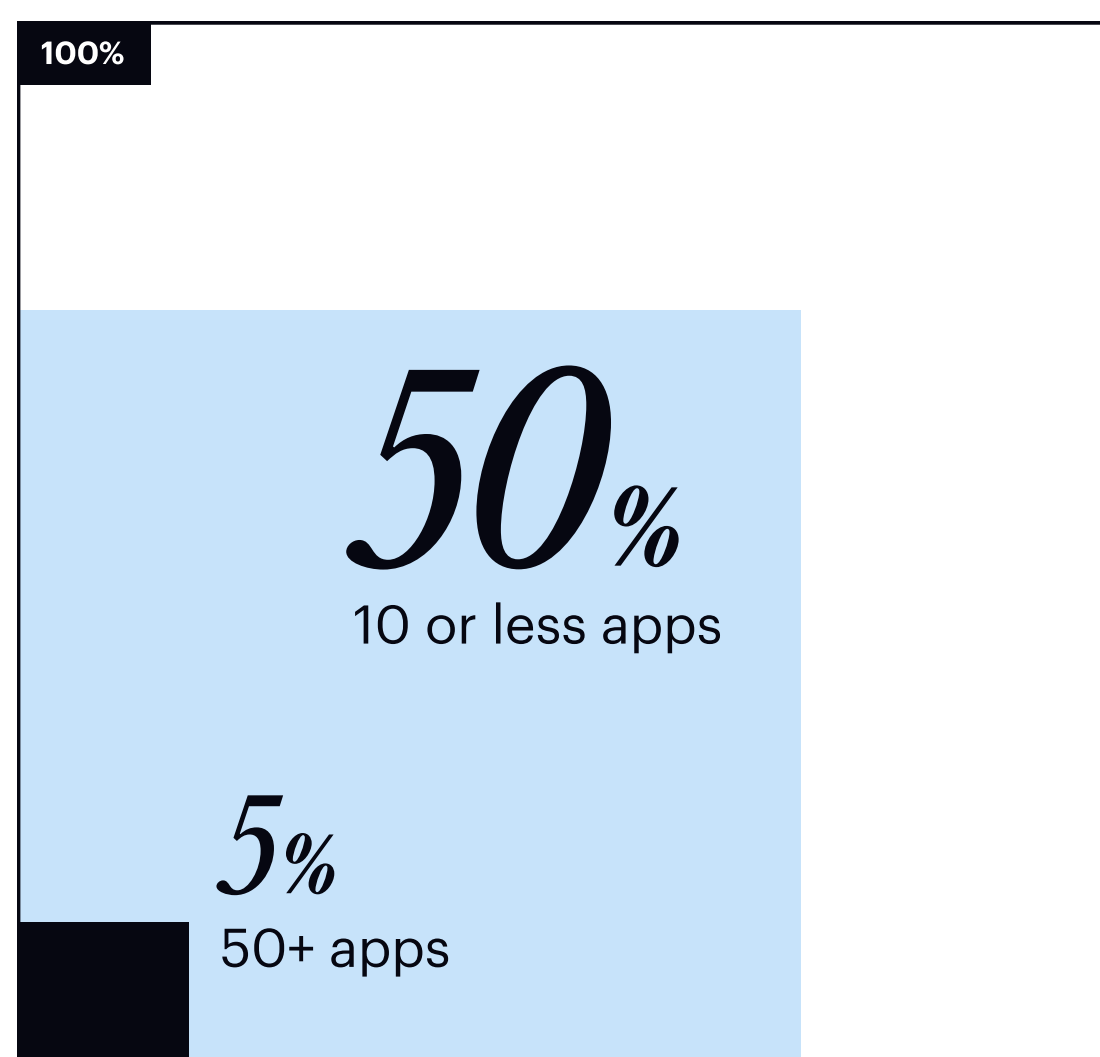
SMBs are largely invested in technology already. It's impossible not to be in this digital age. Today, **machines handle 34% of business-related tasks**, while the remaining 66% are carried out by humans. The adoption of automation technology acts as a dynamic catalyst, shaping the strategies, growth trajectories, and competitive capabilities of small businesses against their larger peers.

Exploring the collected data, we can identify some of the trends that govern small business automation:

TECH STACK OPTIMIZATION:

Quality over quantity

Rapid digitalization that happened during the pandemic has resulted in inflated tech stacks and significant increase in software spend.



Our recent survey revealed that half of respondents are using 10 or less apps across their organization, and only 5% are using more than 50 apps.

This looks promising given that larger companies continue to combat inflated tech stacks.

A recent [SaaS Management Index Report](#) suggests that an average SMB of up to 500 employees has approximately 172 apps in their tech stack – even in the face of app consolidation and budget constraints!

Streamlining an organization's tech stack is the first step in becoming more productive, and that seems to be a priority for most SMBs. It's all about investing in the **best business technology solutions** that will help you **work smarter, not harder**.

The untapped potential of low-code/no-code tools

When it comes to automation for small business, more low-code/no-code options are emerging as a way to give the workforce an autonomous and low-effort way to implement automation. However, more than half of SMBs have never used low-code/no-code document automation tools.

The impact of low-code/no-code tools on driving digital transformation among countless businesses is undeniable. However, amidst this progress, many SMB owners find themselves struggling with the question of how to kickstart their low-code strategy.

There are two typical scenarios of low-code adoption for businesses:

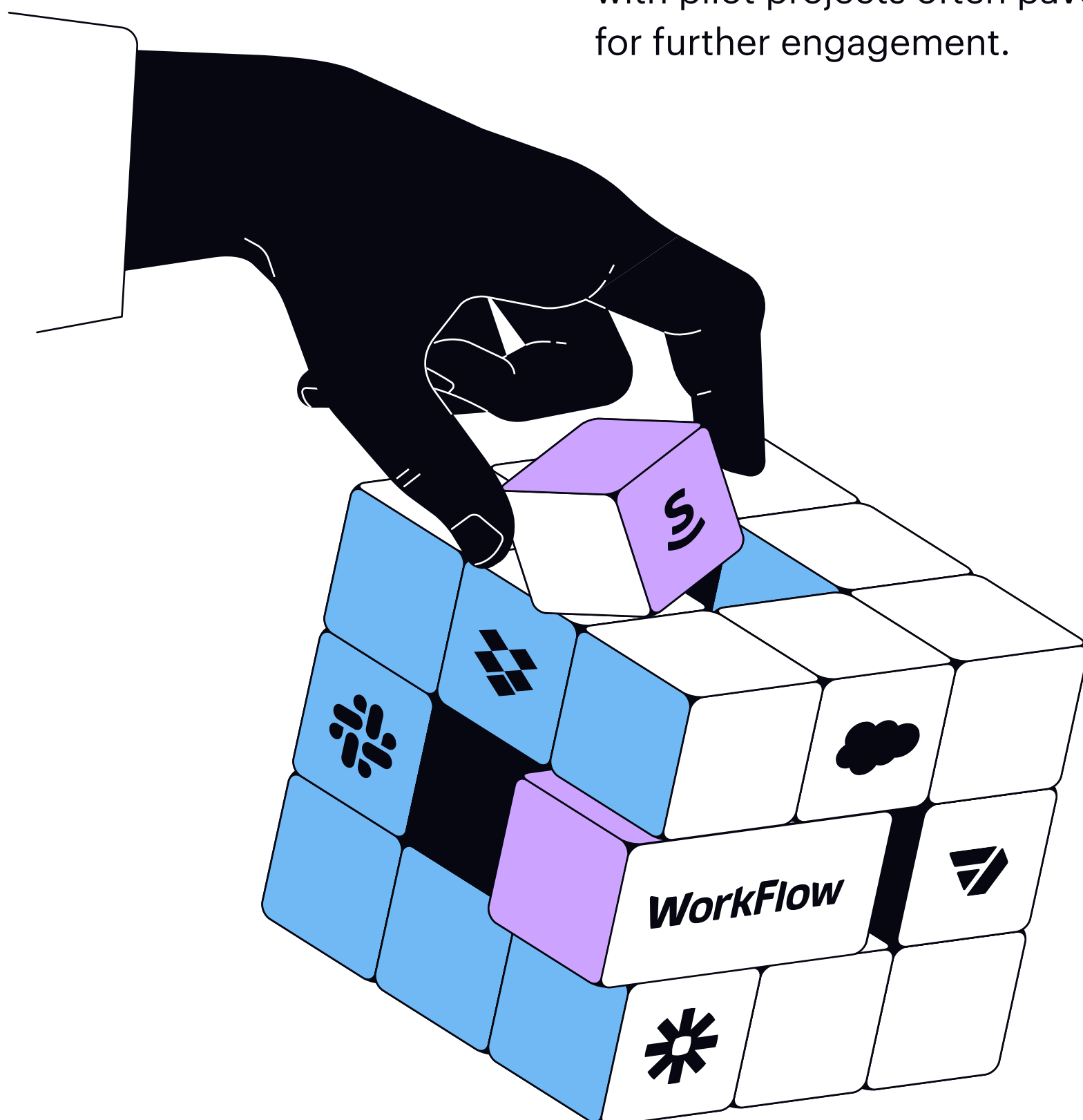
External

Often, low-code initiatives are sparked by external partners, such as tech collaborators. These partners bring expertise and project outcomes, elevating the allure of low code. Success with pilot projects often paves the way for further engagement.

Internal

Existing employees utilizing low-code/no-code tools, known as citizen developers, can naturally champion low-code adoption within the organization. Their in-depth knowledge of business processes promotes an almost 'organic' integration.

The first step to low-code/no-code adoption involves choosing the right low-code tool and staff training. In many cases, employees serve as the most effective advocates for low-code adoption – they have a deep understanding of business operations and processes, which allows them to build apps and automate workflows with a broader business perspective, unlike traditional developers.



Embracing digital signatures has become the new norm

A previous airSlate survey conducted in the heat of the COVID-19 pandemic revealed that almost half of the surveyed small businesses had concerns over digital signatures security and privacy.

However, our recent survey revealed a significant shift from using traditional wet signatures to digital signatures, with a remarkable 2/3 of respondents already utilizing digital signatures in their business operations.

This insight not only reflects a growing trend but also proves the newfound trust in digital signatures as a secure and safe way of signing documents electronically. With our distributed, yet connected environment and less opportunity for in-person interaction, a reliable eSignature solution is quickly becoming a need-to-have versus a nice-to-have tool.



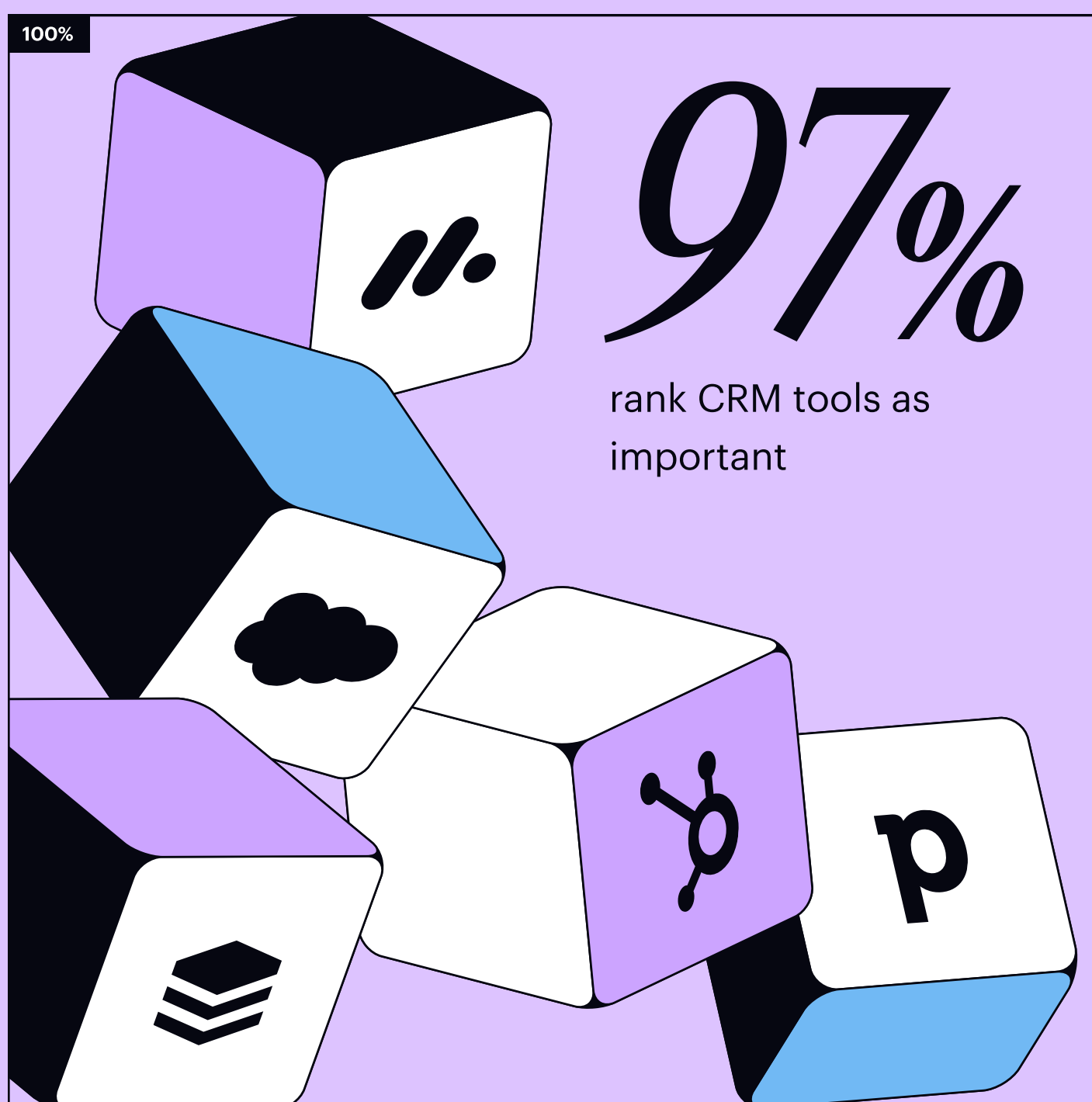
What kind of automation tools matter and why?

We see that SMBs are already experimenting with automation, but where do their priorities lie? Which departments are relying on automation for their success? And what is ultimately driving tech purchasing decisions?

"CRMification" of small businesses

SMBs can agree on one thing: **business productivity solutions** are most pressing to their tech needs. Any improvement in small business productivity would be a major gain, which is why document workflow automation and eSignature tools are so appealing.

We are also seeing the importance of customer relationship management solutions for small businesses increasing. Formerly, CRMs were considered predominantly enterprise solutions - a luxury reserved for those with abundant resources.

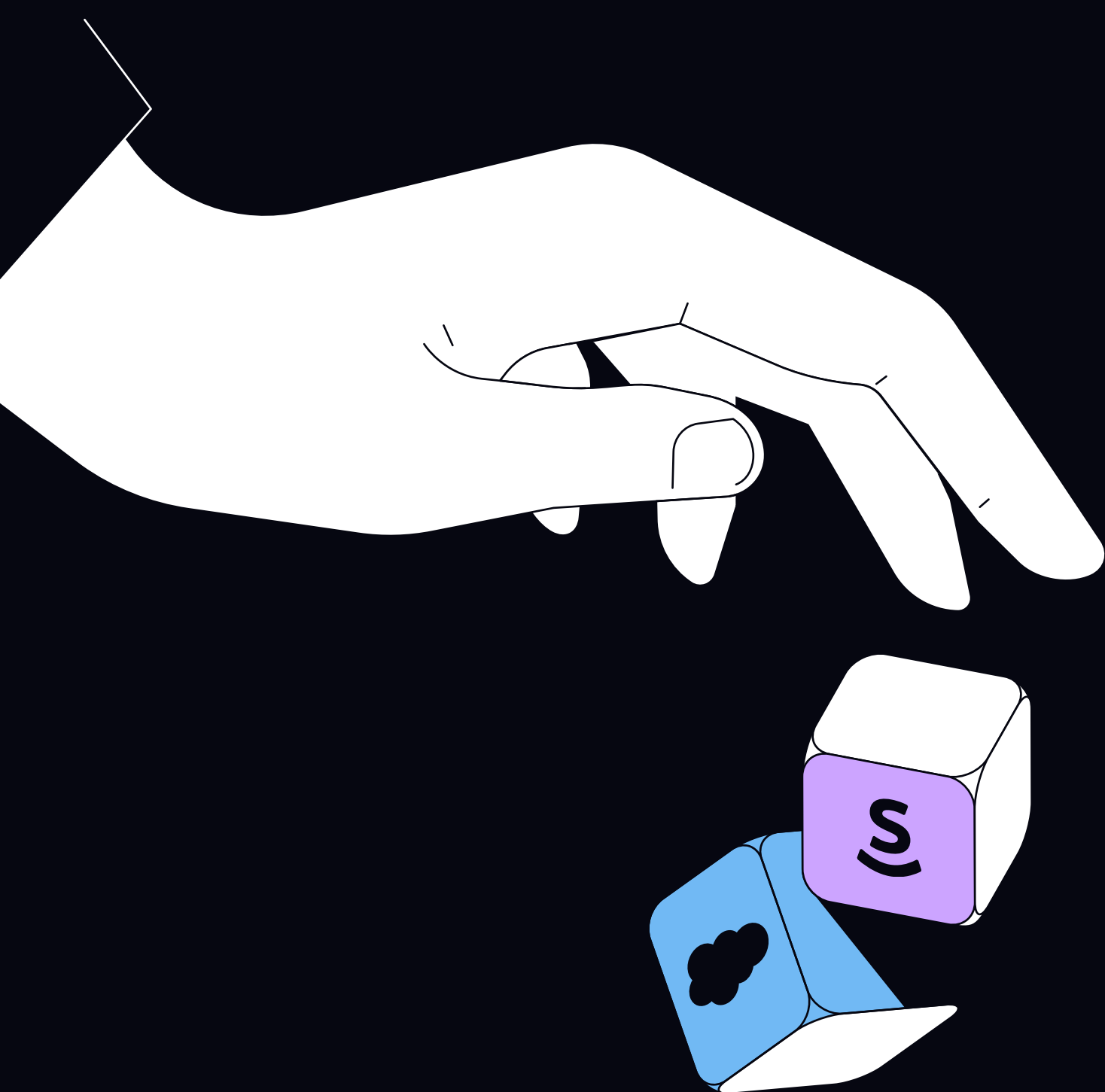


Overwhelmingly, SMBs believe that CRM systems are crucial for their company's bottom line. In fact, almost **97% of respondents rank CRM solutions as important.**

This sentiment finds support in another study, which reveals that a significant **91% of small businesses** with 11 or more employees have adopted CRM solutions, driven by the potential for substantial growth.

In some ways, CRM solutions can be perceived as roadblocks because when they are implemented, sales teams find themselves caught in a cycle of updating contact information. We know salespeople just want to chase deals, not type data.

This tells us that *SMBs* are in need of *purpose-built* solutions that will help them *grow and scale* at a sustainable, but *significant level*.



Imagine having a document workflow automation tool seamlessly integrated with well-known CRM systems like Salesforce, HubSpot, Netsuite, or MS Dynamics. This integration has the potential to simplify the lives of sales professionals, enabling them to dedicate more time and energy to closing deals.

Take [airSlate's integration with Salesforce](#), for instance. With its help, sales teams gain the ability to create end-to-end, multi-step, and multi-branch workflows directly within the Salesforce platform. These workflows can be applied to automate a range of tasks such as [invoice processing](#), [data exporting](#), approval workflows, notifications, and secure storage. This level of integration empowers sales teams to work smarter, streamline processes, and ultimately boost their efficiency in pursuing successful deals.

Who needs document automation?

While it is certainly true that every department in an organization can benefit from document workflow automation solutions, who is getting first dibs?

Currently, finance and sales teams are the two verticals that find document automation and eSignature solutions most important to their success.

Finance and sales teams tend to have repeatable processes that can be time-consuming and tedious. They also tend to deal with plenty of paperwork related to closing deals or approving budgets.

44.1%

of finance

41.2%

of sales teams

44.1% of finance and 41.2% of sales teams surveyed find document workflow automation and eSignature solutions important.

Finance

Finance professionals benefit from solutions that seamlessly integrate with their existing financial systems and provide a clear record for future reference and resolution.

They want to:

- Develop reliable and secure processes for time-sensitive payments and transactions
- Generate error-free and audit-ready financial documents within deadlines
- Seamlessly connect with their current financial management systems and procedures, ensuring a comprehensive overview of financial activities

Sales

Sales professionals need automation solutions that not only help them seal deals quickly but also enable them to dedicate more time to generating revenue.

Their goals include:

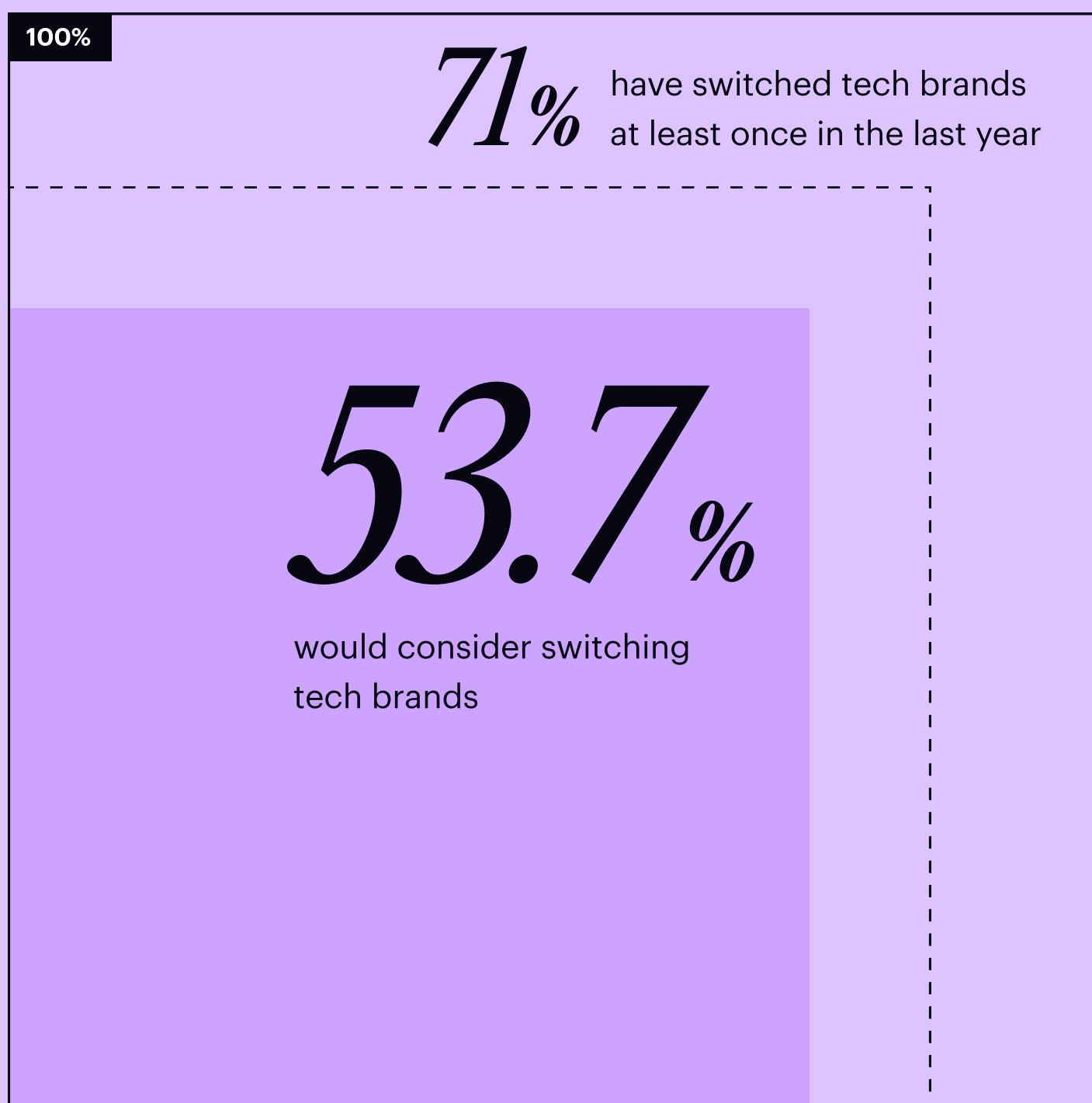
- Creating streamlined and efficient Audit Trails for smoother processes
- Gaining better visibility into the progress of deals, ensuring they're always on track
- Freeing up valuable time by reducing paperwork management, so they can concentrate on what truly drives success

What drives - and hinders - purchasing decisions?

In most SMBs, business owners and IT leaders are making decisions about which tech solutions to adopt, and CEOs are in charge of approving those decisions. But what factors go into how a tech solution is chosen?

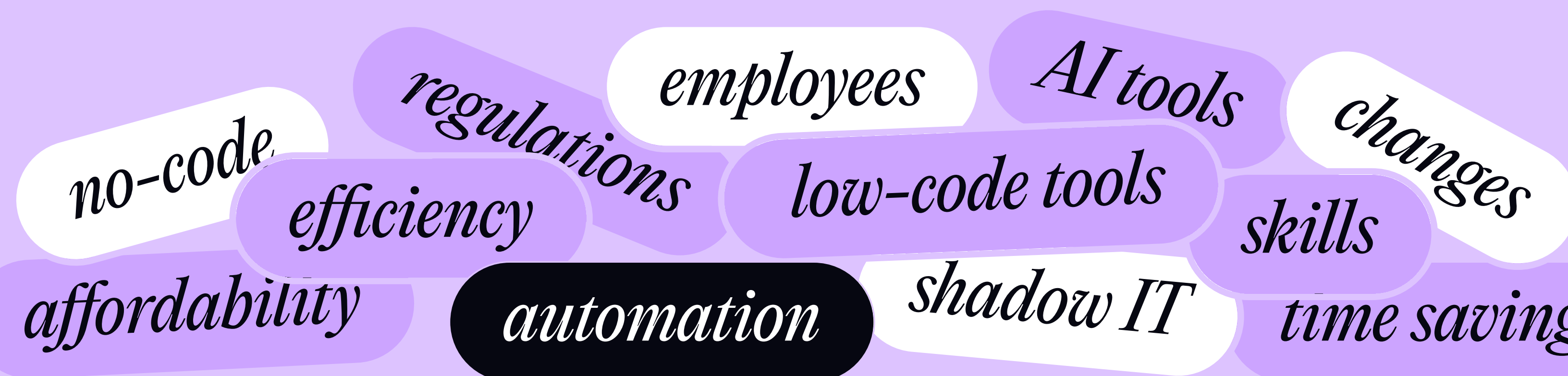
We know that small business productivity software is so important for SMBs. With so many options out there, how do purchasers narrow down?

Our recent survey revealed that SMBs rank **ease of use** and **affordability** as the top priorities when making technology purchase decisions.



Interestingly enough, more than half of respondents (53.7%) surveyed consider switching from the document automation solution they're currently using. This correlates with a recent trend as 71% of global consumers **switched tech brands** at least once over the past year. Most were looking for a unique value proposition, a better deal, or a better quality product.

Often, decision-makers are faced with analysis paralysis given that the market is completely flooded with options. Coupled with the fact that many tools are quite expensive, it is a challenge for SMBs to embrace technology the way enterprises do so easily.



Automation sentiments: Are SMBs truly ready?

While most can agree that automation has already changed the way we work and will continue to do so, many can't help but wonder what, if any, the negative consequences will be. Questions arise, such as:



Will the adoption of automation and AI tools for small business eventually eradicate our jobs?



How can the use of automation tools be governed within an organization to minimize the burdens of shadow IT?



Do employees within SMBs have the skills needed to correctly implement and use automation tools?

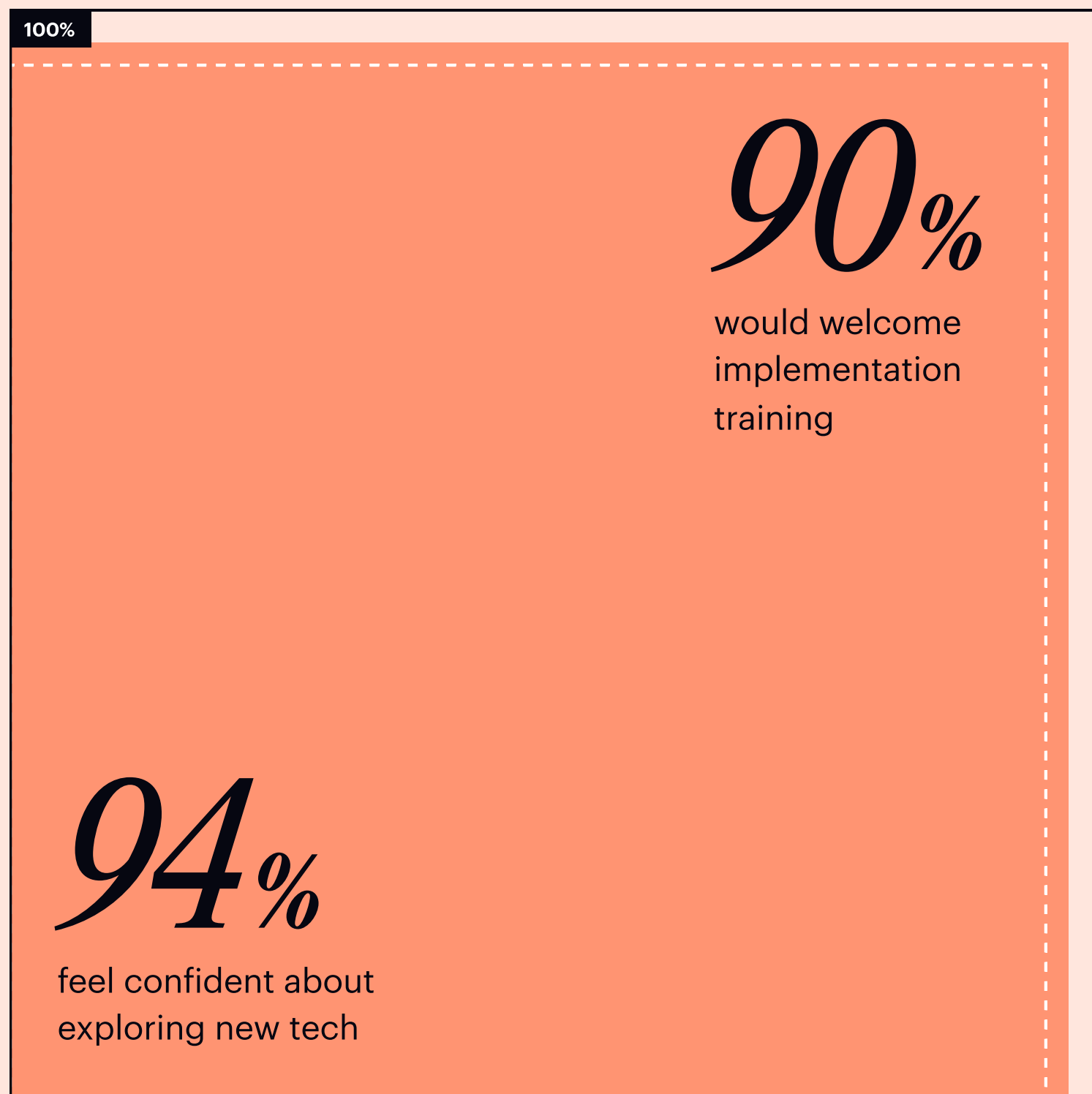
According to our survey, the majority of SMBs have an optimistic outlook when it comes to automation and its impacts.

94% *Almost 94% of those surveyed believe that human interaction is vital to using automation and AI effectively.*

15% *Less than 15% are concerned about job displacement.*

90% *The majority of respondents believe their business will benefit from time and budget savings brought on by adopting automation.*

In 2023, the **do more with less** philosophy has extended its reach beyond larger corporations grappling with workforce changes. It's become a guiding principle for small businesses striving to maintain a competitive edge during the ongoing economic resurgence following the pandemic.



As SMBs navigate the landscape of recovery, the rapid integration of automation and AI tools is becoming not just a trend but a necessity.

While 94% of those surveyed feel confident about seeking out and exploring new automation solutions, almost 90% would welcome training or guidance when it comes to implementation.

To unlock the potential of document workflow automation solutions, SMBs should extend their efforts beyond mere implementation. SMBs should take care to look for tech solutions that have robust features that meet their needs and that provide knowledge resources, great customer service, and additional support.

By offering **automation training and certification programs**, organizations can not only enhance operational efficiency but also increase their business value, retain top talent, and set their workforce up for success. As employees acquire new automation skills, their enthusiasm and dedication increase, leading to higher productivity, job satisfaction, and better retention.

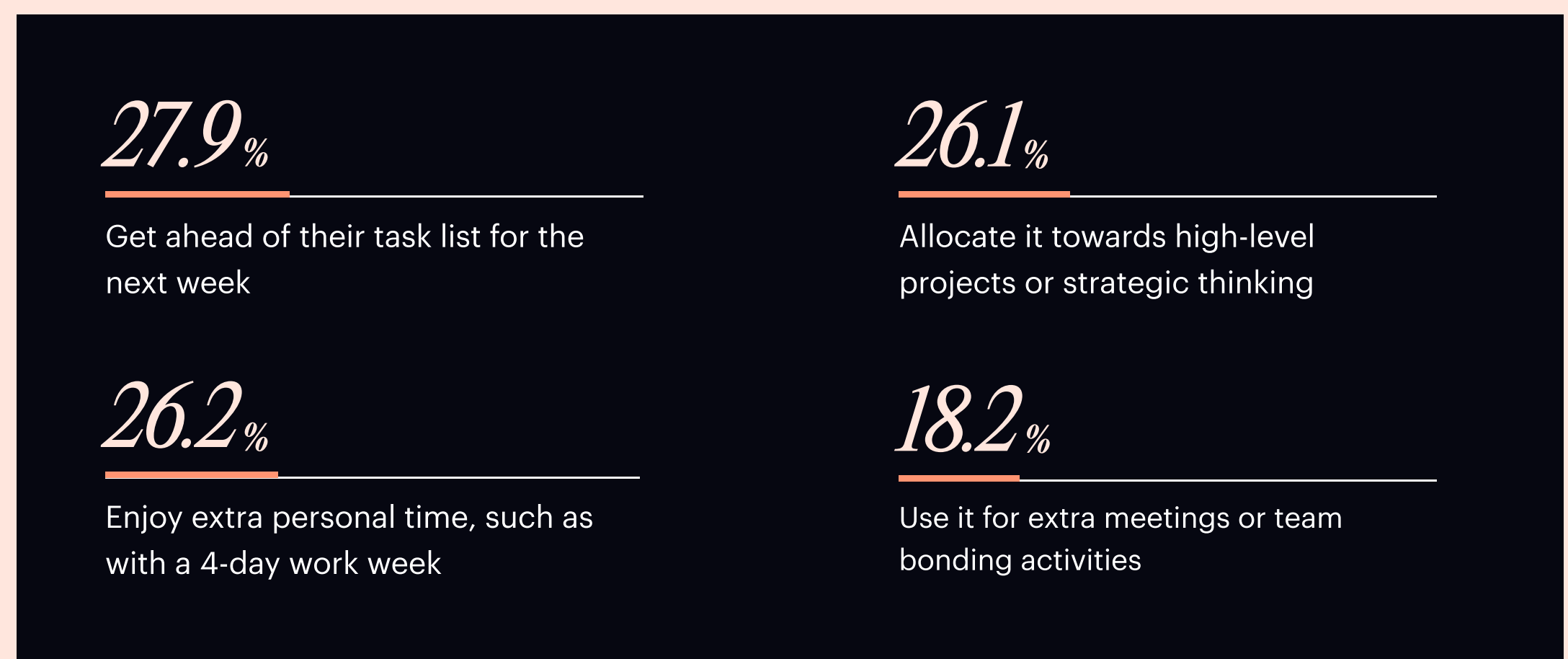
do more with less

More automation = more time

The goal with adopting automation tools is to hack productivity and optimize efficiency. What that ultimately means is that organizations will gain more time which they can refocus on revenue-generating activities and business improvements.

Allocating busywork to automation solutions can save organizations up to 10 hours per week.

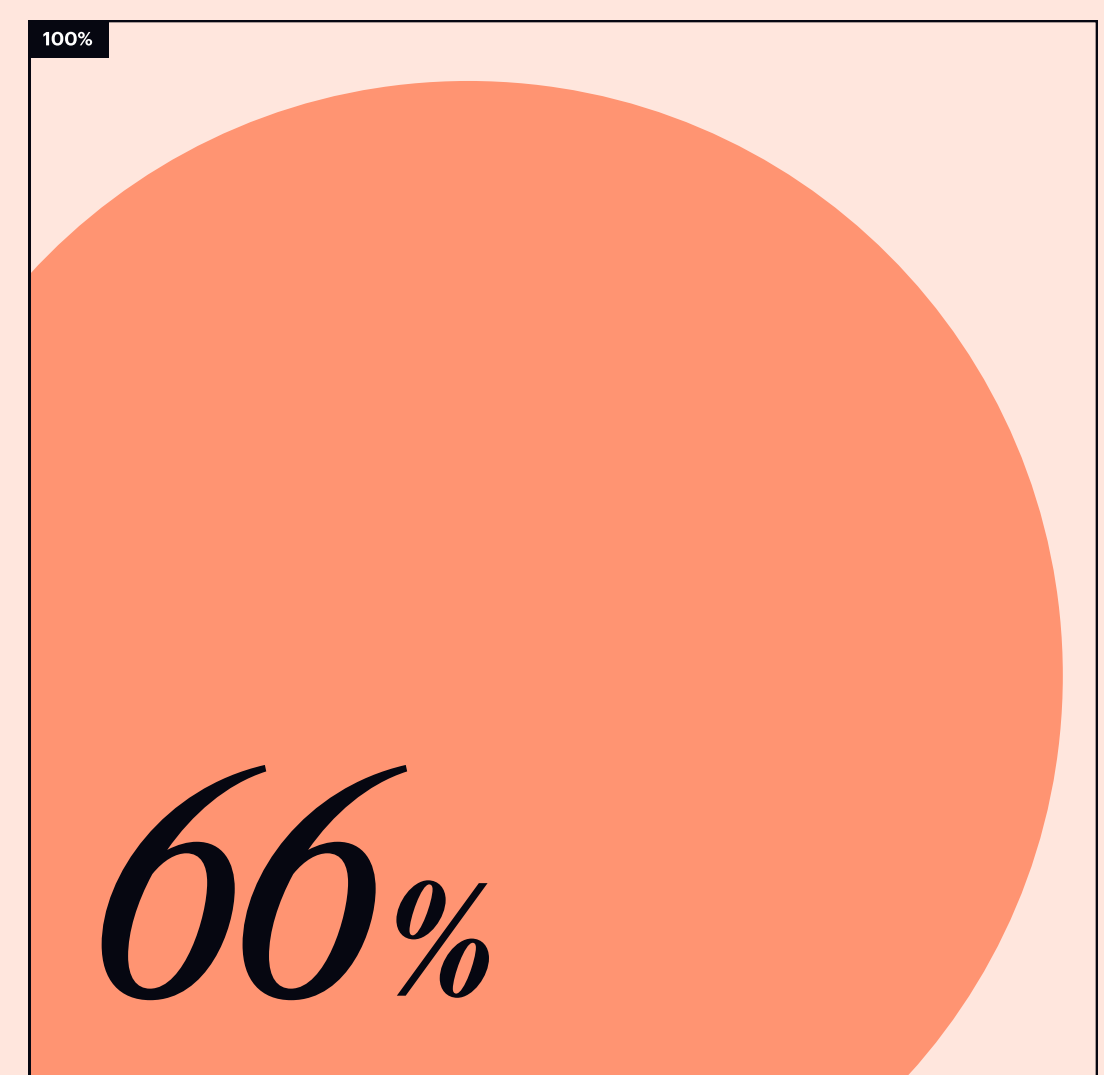
With that extra time, SMBs believe they would:



The idea of a 4-day work week has been consistently and repeatedly making its way into conversations. In fact, we are seeing many organizations in several countries investing in 4-day work week trial programs. In the UK, a **6-month trial** resulted in increased productivity, and improved morale and team culture.

According to our survey, there is an appetite for exploring a 4-day work week. **66.1%** of respondents believe that the number one benefit would be an improved work-life balance, with other benefits including:

- Increased employee productivity and morale
- Cost savings on operational expenses
- Enhanced recruitment and retention of talent



Automation tools are both critical to and a catalyst for a successful 4-day work week, as reducing or eliminating manual busywork is key.

Seizing an important opportunity

While SMBs will continue to grapple with limited resources and hefty competition, making wise investment decisions will not only help them be profitable, but will also give their customers a great experience.

Choosing the right automation tools has benefits that go beyond the bottom line. There is a massive opportunity right now to upskill in a way that is not overwhelming and to develop professional skills.

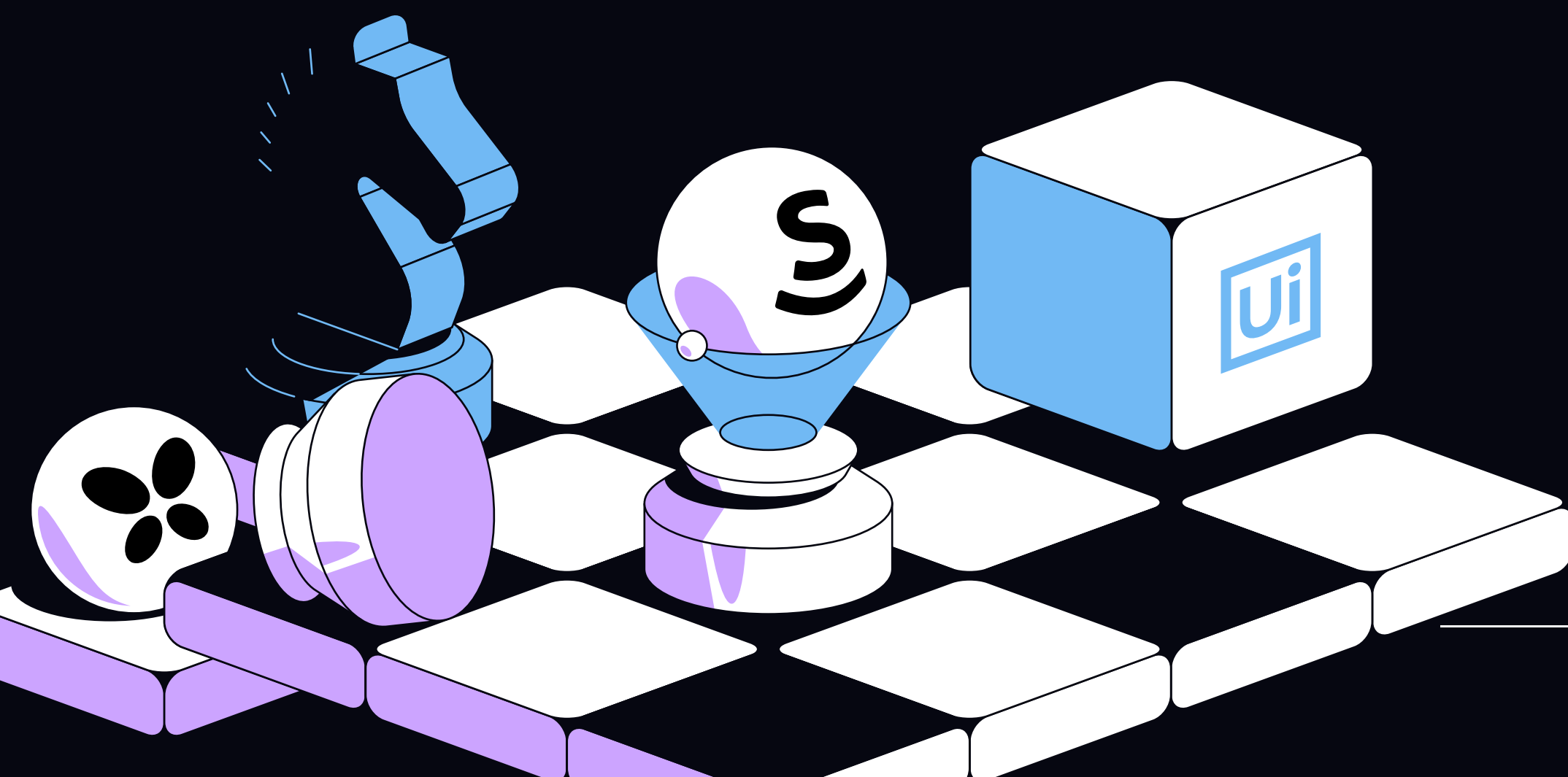
Organizations need to adopt automation in order to move ahead, but employees need to as well. Knowing how to prompt AI solutions and use automation to optimize efficiency are skills that future recruiters will undoubtedly be seeking in their talent.

airSlate: The all-in-one partner in automation

airSlate enables anyone to automate their entire document workflow and integrate their tools easily into a single system.

It is a one-stop-shop for automation solutions and is a great option for those who want to enter the automation market without feeling completely overwhelmed or on their own.

This is a suite of no-code products designed to make documents work for you and built to democratize access to automation.



airSlate solutions include:



airSlate WorkFlow

From simple tasks like editing PDFs and creating forms to eSigning, WorkFlow is everything you need to create, integrate, and automate your documents. >



airSlate SignNow

SignNow is an eSignature solution that makes your documents easy to sign, on any device, and gives your team visibility into the signing process with real-time document tracking and notifications. >



pdfFiller

pdfFiller is a cloud-based document management solution for individuals and businesses who need a simple, fast, and secure way to create, edit, sign, and share PDF documents from any device. >



DocHub

DocHub offers a deep integration with Google Workspace to allow users to import, export, modify, and sign documents directly from Google apps. Within a single, easy-to-use solution, DocHub keeps over 500 million documents safe, secure, and updated in real-time within the cloud. >



US Legal Forms

With US Legal Forms, users have access to an online library of more than 85,000 legal templates, detailed guidelines, completion, and online notary services. >



Document Automation Hub

Document Automation Hub empowers developers to access and embed flexible and modular APIs within their application or website and automate their document processes. It offers a suite of API capabilities for automating document workflows including eSignature, document generation, embedded PDF editing, collecting user input, and conditional branching with multiple steps and approvers. >



signNow API

signNow API enables developers to complete entire document lifecycles all in one place. From eSigning documents, requesting payments, creating templates, and real-time status tracking, signNow API is built to transform your document workflows. >

A major benefit of choosing airSlate tools is gaining access to [airSlate Academy](#) - free courses that range from the basics of automation to expert certifications that provide the skills needed to digitally transform a business.

These resources ensure that guidance is always available and that the path to automation mastery remains attainable.

Many airSlate customers agree that their favorite part about investing in these solutions is the high-caliber customer support they get.

Here are what some airSlate customers have to say:

“*Automate business processes and client intake, no experience needed.*”

Overall

User friendly with a large knowledge base and exceptional customer support. AirSlate is able to do everything we need, and so much more that we've decided to pay the subscription to automate many of our business and client processes.

— **Tim M.**

Head of Teacher Training and Development Education Management

[Read full review](#)

“*Excellent support!*”

What do you like best about airSlate?

As a business owner with lots of ideas about how to automate our processes and limited programming experience, I have found AirSlate to be relatively easy to learn. I have been able to do simple automations myself with Salesforce with very few issues. But the best thing by far about AirSlate is the customer support. This is a company that cares about the success of its users. Great product, great team.

— **Kathryn G.**

Small-Business

[Read full review](#)

Ready to take the leap into automation?

We believe anyone can turn their passion into an empire with the right tools. So we built them.

Contact airSlate to learn more →

