AUTOMATIZER

The Revolution for CRM

Nikolaus Kimla

Pipeliner

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"You never change things by fighting the existing reality. To change something, build a new model that makes the existing model obsolete."

— BUCKMINSTER FULLER

INTRODUCTION

It's no secret that the covid19 pandemic has pushed the digital world many years ahead—I would say at least 5 years, perhaps even more. We now see (whether you believe it or not) that with the "3rd wave" of covid19 we need to prepare ourselves for this to be an ongoing situation. The pressure to have a digital strategy is now crucial, and I would say it's impossible to function as a business if you don't have one.

The pandemic has caused a transformation in society that is changing everything we do, and how and why we do it. We see these changes in how we produce, how we consume, in transport and endless other sectors. A primary change that has come about is in the way we communicate. Zoom rapidly transformed from a company no one had ever heard of to a world brand. It's the platform through which much business is conducted and schooling is even done.

Something I find very interesting is that G5—5th generation wireless—was implemented just in time for the pandemic. I don't know if this was intentional or not, but it sure made the difference when we all had to work from home. A couple of years ago, the internet would not have supported the sheer amount of video conferencing that is taking place. The mobile web is just the beginning of this tremendous revolution.

Now, through technology, every company needs to learn to truly focus, and out of that focus to become more efficient. From efficiency comes productivity, and from productivity comes profitability.

Automatizer

Let's take a look at the crucial role that CRM is playing in this transformation, and why Automatizer is, for the future, the core of our CRM product.

In a recent article I was discussing the need, throughout time, to reduce and eliminate repetitive tasks. But in fact it's not so much about reduction, because

the word "reduction" is somewhat negative. It's more the need for support in such tasks. Above we were discussing efficiency, and efficiency is how you optimize work. When you're at home and you have multiple processes, optimization is difficult when you have to do everything manually.

For the first time in this technology movement we're in, we now have a system with which someone can automate many different processes. We've created an engine for this purpose, that becomes the center of CRM technology. Almost anyone can configure and use it.

I've talked before about the most widely used application in history: Microsoft Excel. Just about anyone can pick it up and use it immediately, so extensive study is not required. At the same time, you can dive deep and take years to learn Excel's more complex functionality in-depth, which many have done. With scripting skills, you can even create automation in Excel.

Today we need a different technology, one for the purpose of automating as many repetitive tasks as possible. It must be as simple to pick up and use as Excel. This is why Automatizer, the heart of CRM of the future, was created. It is the hub around which everything else revolves. Like a wheel has spokes, many functions radiate out from this Automatizer hub.

And also like Excel, Automatizer can be used for more sophisticated tasks. It is not only useful for automating the simpler daily repetitive activities, but for more complex work, it allows you to regularly assemble data from multiple touchpoints and summarize or otherwise analyze or utilize it.

The Problem Being Solved

In many ways, Automatizer is the next in a very long line of time and labor-saving devices going back to the beginning of time. Just one example is that somewhere sometime back, somebody got sick and tired of having to wash dishes after every meal, and decided to invent the dishwasher. Another task people became weary of—washing clothes—resulted in the washing machine. When buildings became higher and climbing stairs became too much of a chore, the elevator was invented.

It's a similar situation today. There are many tasks performed as part of sales that rob the salesperson of value, simply because these tasks could be automated. Such tasks are not only boring, but any intelligent person would ask, "Why do I have a computer? Why isn't the computer doing this?" As an example, copy-paste was one of the core concepts for the Macintosh computer. It's now everywhere, and we've become very used to it. But if someone performs copy-paste 100 times a day, they would rightly think, "Why can't the computer do that? It's a waste of my valuable time."

Not to Replace Humans

We are definitely becoming wiser with the way we utilize technology. We're using it to remove repetitive work that normally hinders people in building relationships. That is the heart of automation—it should not replace people, but should free people to pursue their actual purpose, whatever that may be. People were not made to perform repetitive tasks; they become depressed, angry, or upset when they have to do the same thing over and over.

We're now living in a world where technology can take over simple or complex repetitive tasks, which in fact technology can perform much better than humans. Machines never make mistakes, they are never sick, they work 24/7, and don't require vacation pay.

The processes you can create with Automatizer are endless. Through creating these processes you become more focused. Here we circle back to the beginning, because out of being focused you learn and become more efficient. Efficiency makes you more productive, and from that productivity comes profitability.

When your organization focuses on the right technology utilized for the right purpose, it can't help but be successful. As technology is utilized, it needs to be constantly fine-tuned. This fine-tuning should be so easy that everyone can learn it. That is something else we've accomplished with Automatizer.

I invite you to come with me as we dive deeper into Automatizer—learn how it works and how you can use it.
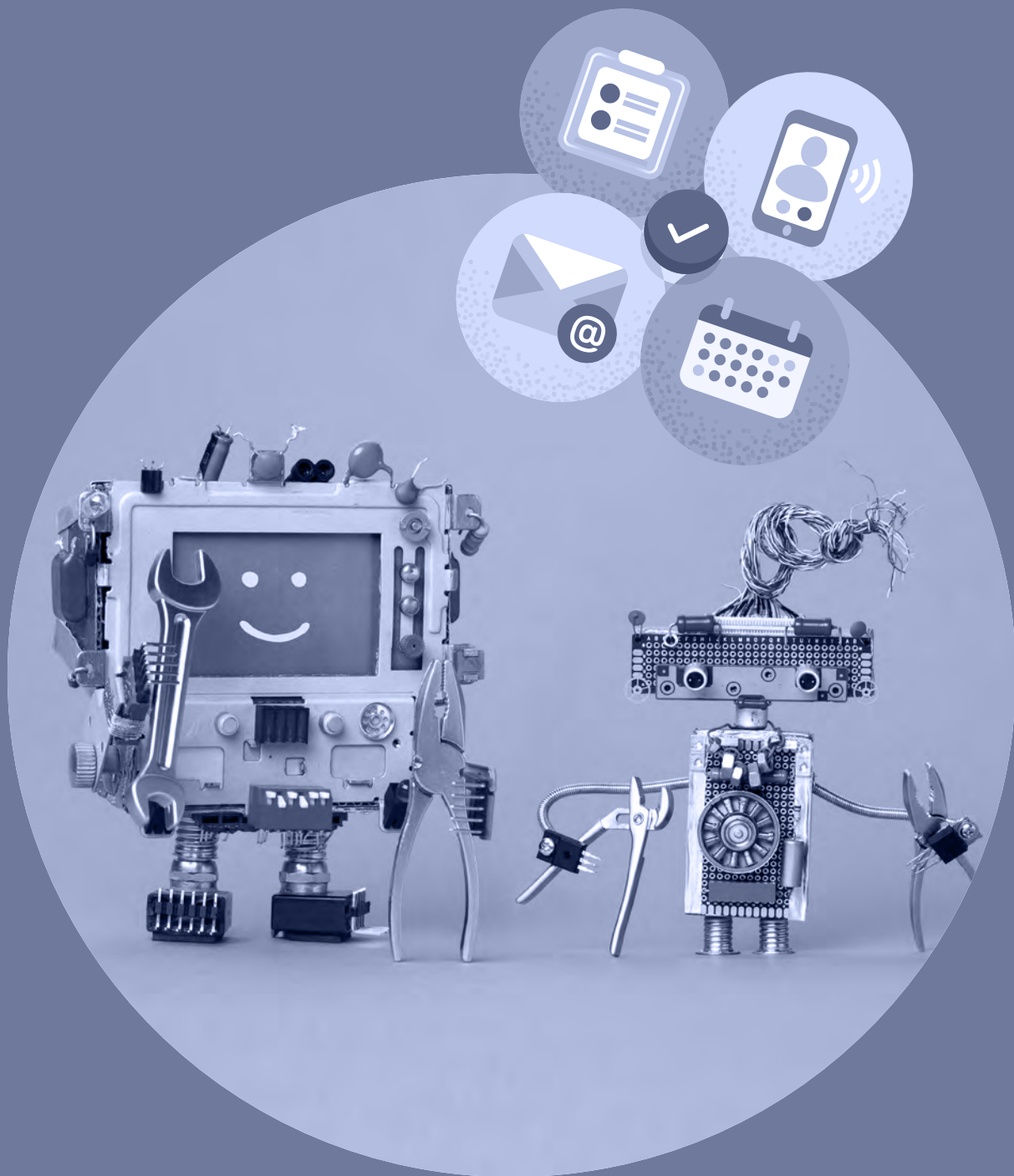
"Simplicity is about subtracting the obvious and adding the meaningful."

— JOHN MAEDA

Pipeliner CRM Automatizer: The Automation Growth Engine

A very interesting report was just released from the World Economic Forum. It highlights something that I've been saying for a few years, but which is really significant today: without automation no company is going to make it into the future.
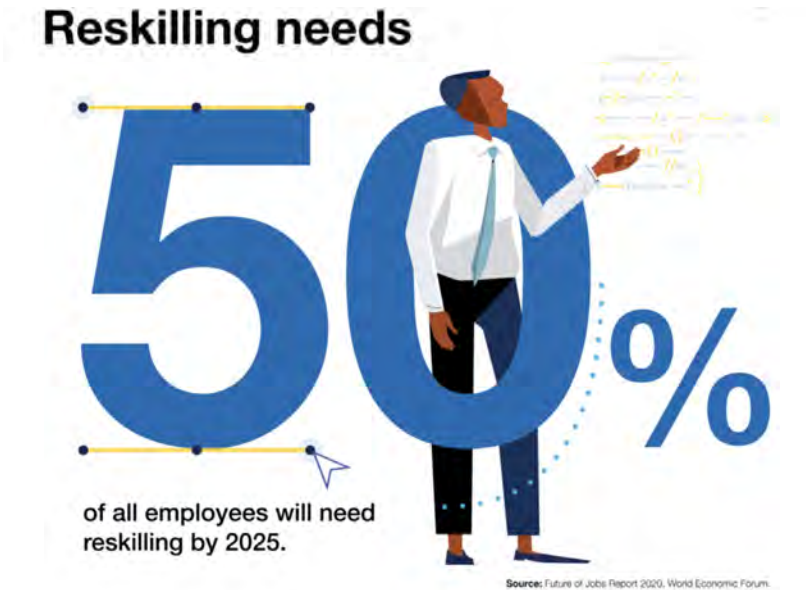
One prediction made by the report is that, by 2025, 15 percent of the human workforce will be reduced, replaced by machines.

Rate of automation

Source: Future of Jobs Report 2020, World Economic Forum.
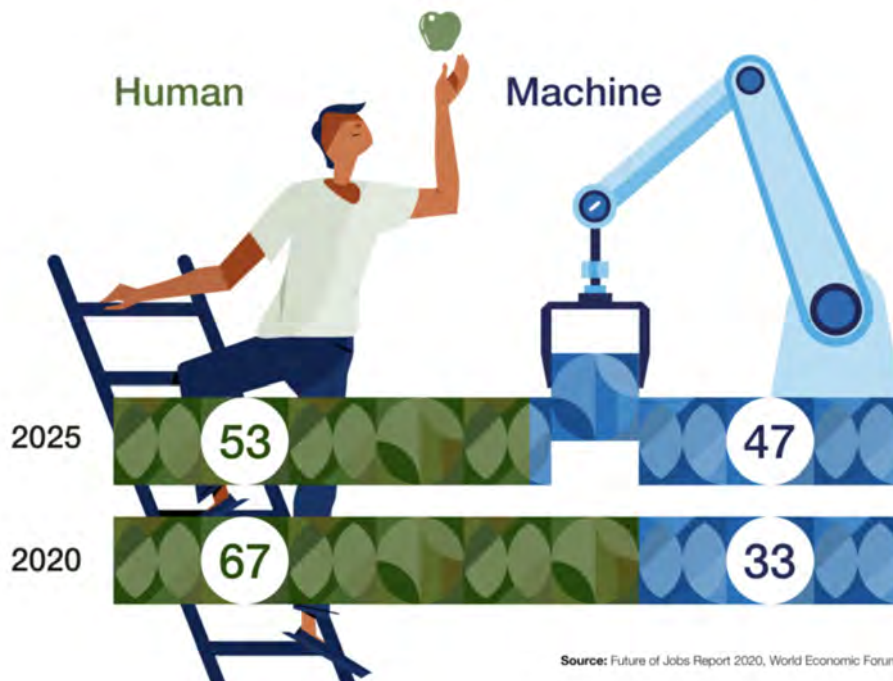
Another prediction is that also by 2025, 50 percent of the workforce will need to be reskilled.

You can see that between these two predictions, roughly half the workforce is going to be affected by advances in automation—either by being replaced or forced to reskill.

Reskilling needs

50%

of all employees will need reskilling by 2025.

Source: Future of Jobs Report 2020, World Economic Forum.

A considerable amount of manual work that is still being done in companies is rapidly becoming automated. An example given in the report is data entry clerks, part of a job demand that will decrease from 97 million to 85 million by 2025.

97 million

85 million

Growing job demand:
1. Data Analysts and Scientists
2. AI and Machine Learning Specialists
3. Big Data Specialists
4. Digital Marketing and Strategy Specialists
5. Process Automation Specialists
6. Business Development Professionals
7. Digital Transformation Specialists
8. Information Security Analysts
9. Software and Applications Developers
10. Internet of Things Specialists

Decreasing job demand:
1. Data Entry Clerks
2. Administrative and Executive Secretaries
3. Accounting, Bookkeeping and Payroll Clerks
4. Accountants and Auditors
5. Assembly and Factory Workers
6. Business Services and Administration Managers
7. Client Information and Customer Service Workers
8. General and Operations Managers
9. Mechanics and Machinery Repairers
10. Material-Recording and Stock-Keeping Clerks

Source: Future of Jobs Report 2020, World Economic Forum.

At Pipeliner, we are right with this trend with Automatizer, because this is exactly what Automatizer does: makes it possible for companies to automate many of the tasks staff have been having to manually perform.

Exponential Growth

We can see that the trend in technology is most definitely exponential. We can simply look at the world's largest repository for open source programming, GitHub, to see how true this is. In 2013, GitHub had 3 million users. Today, there are 40 million, with over 190 million repositories. This means that some 40 million programmers are working on all kinds of different code to make it better.

When putting together a program, it's just a simple matter now to go and find a component that you need, such as a dashboard. You can simply pick it up and plug it into your program. For programmers, this very handy—and such components, being constantly worked on, only become better and better over time.

Not only are these components becoming better, but it could be said that none of them, because of this constant improvement, are low-quality. We could make a comparison to the auto industry, in which technology only becomes better and more powerful. Today, if you're out shopping for a new car, there really are no inferior ones. When I was a teenager I had a VW bug that I worked on myself, and it had no air conditioner, no power steering or power brakes, no sunroof, no sound system—none of that. Today my car is almost like a spaceship, having amazing features that I couldn't have even imagined in my old VW, and so are all the other new cars out there. Just like automobiles continue to become more robust, so do technology components.

Growing Without Staff

At Pipeliner, our contribution to this technology trend is to create a way for processes to be automated for sales, with no coding. With Automatizer, we're offering a supremely easy workflow tool—which is actually an automation growth engine. With it you can integrate any cloud application into your workflow, for scalable processes in your organization.

As we see in the World Economic Forum report, an increasing number of humans will be replaced by technology tools such as Automatizer, over the next 5 years. That means that when a company has a successful business model, it can grow exponentially without adding a lot of staff.

Finance models for business will be changing too, as traditionally they were based on staffing offices and creating infrastructure around the staff. This got rather ridiculous, with enormous "super-cool" staff environments with rooms for employees to rest in, to play in, to think in. I think that covid19 has done away with that model, probably on a permanent basis. Companies figured out, once such infrastructures couldn't be used anymore, that they really weren't needed.

In fact, company offices are no longer required at all. Staff are provided the flexibility to work wherever they are located. All that is required is an infrastructure in which staff can connect and communicate.

Change We Must

This is a great deal of change, brought about very rapidly. Some people are overwhelmed by it. We know that some folks are not open to change; it's difficult for them, and they'd rather stick with the old system.

Change can certainly be difficult. Just remember growing up, the physical changes we had to struggle through, followed by suddenly being alone in the world and having to survive. Change comes upon us, but it is not something we take to naturally. There's always a little part of us that wants to hang onto what came before. It's the mindset that really must change.

But change we must. Not so long ago, humans were working in factories. Today, most factory workers have been replaced by robots. And as we've seen, more and more work will be taken on by automation, which will have drastic implications on our lifestyles. These implications will help us redefine what real work is.

Defining Processes

Helping us redefine real work are tools such as Automatizer. But before you can create processes with something like Automatizer, you must define those processes. We could take a super-simple example of process definition in cleaning a house. People today—and throughout time, really—when they had a bit of money, want to hire someone to clean their home. But when the new house cleaner shows up, you're going to have to give them a process. Do they start with the bathroom? The bedrooms? The living room?

Automated processes in a company must likewise be defined. The challenge of the future is, who is doing the defining, and what kind of skills do they need? As an example, in a virtual company, there's no longer a person there answering the phone. How is the phone answered? When there is a message coming in, how is it responded to? There are "virtual secretaries" out there, and Pipeliner uses them, too. But all of these processes must be defined.

In sales, once processes have been defined, you can use Automatizer to simply create them with drag-and-drop.
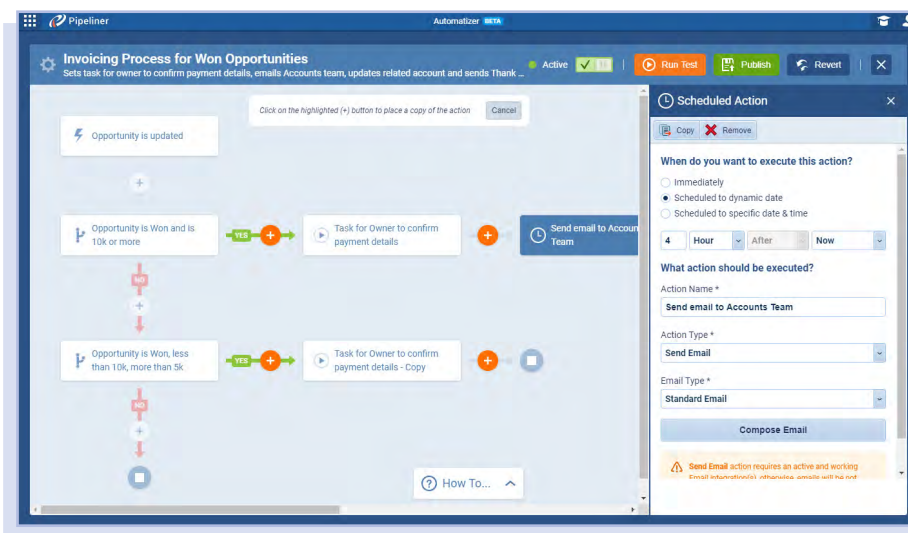
To begin with, simple processes can be created. You certainly don't have to start with multiple complex processes, such as those created by Amazon (Can you imagine the processes behind being able to place an order and having it delivered the same day, sometimes within hours?). I believe such processes are only the beginning, and we'll see many more in the next 2 to 3 years that are even more incredible.

But let's start easy. And we've certainly made it easy with Automatizer. In the next chapter, we'll begin diving deeper into its use.
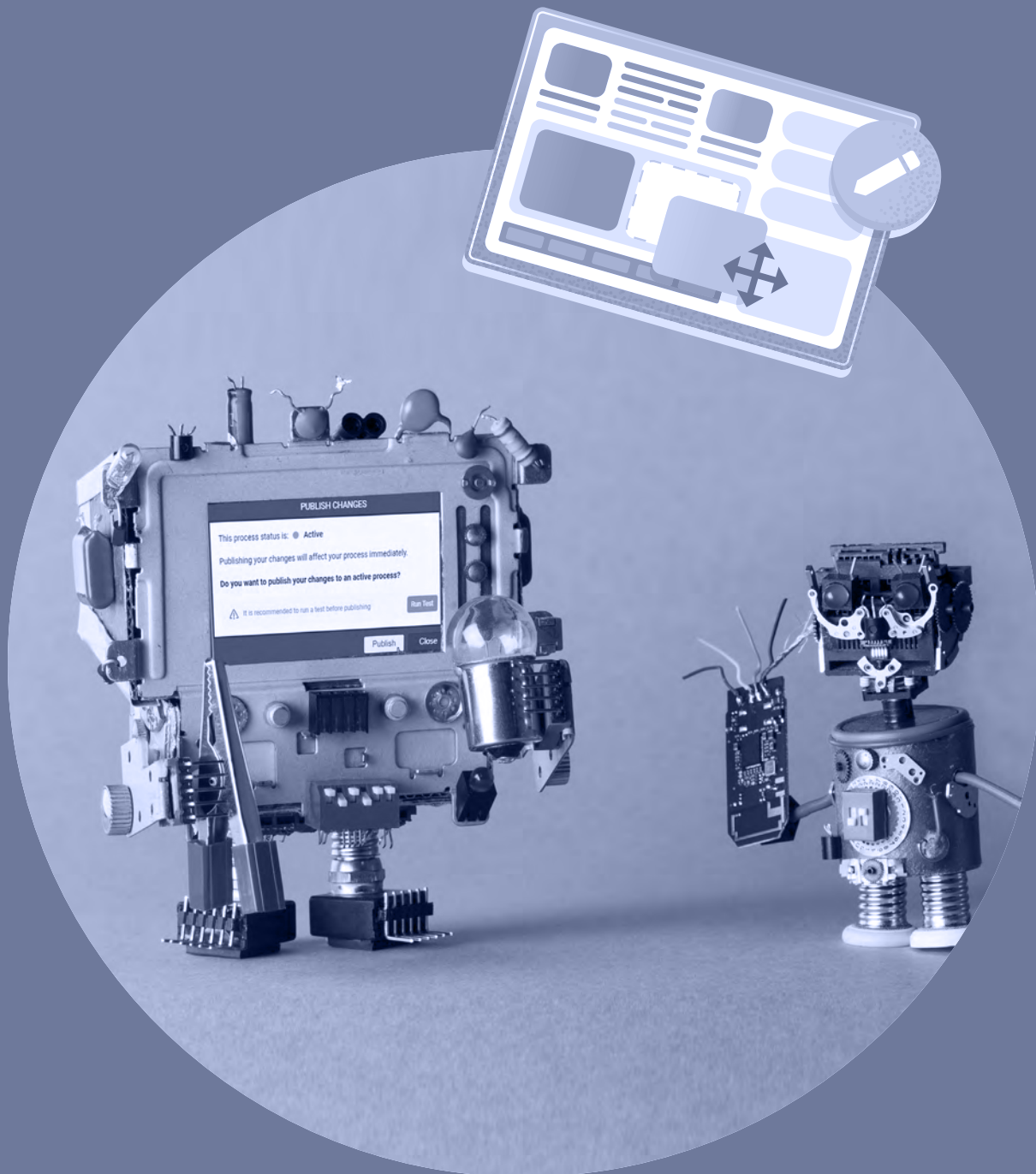
"Technology is best when it brings people together."

— MATT MULLENWEG

Why is Automatizer So Cool?

There's a very good reason for fully describing Automatizer and its incredible functionality, well beyond just a sales pitch for Pipeliner CRM. Automatizer is the vanguard of new technical enablement for all CRM users and stakeholders. It allows any CRM user to create processes to take up any repetitive CRM task, from simple to complex, and to instantly implement it.

This capability has never been available to users before. If we go back to legacy systems, processes could only be created by the most technically advanced IT personnel or programmers. Because of complexity, a process took an excessive amount of time to create. Once it was finally created, the process could not be quickly implemented. Beyond that, companies usually didn't have the time, energy and cost to just create processes. So even if the vision was there to create various time-saving processes, it wasn't a reality.

Now we have a technology like Automatizer, which has a democratizing approach to automation. It's possible for any user. There is no coding involved—it's simply drag-and-drop. The user does need to have an understanding of business, but given that, they can do a great deal both for themselves and for their teams. In addition, it empowers small and medium companies to be able to operate like worldwide enterprises. Costs can be reduced in staffing, and on scalability.

The recent exponential growth of technology, to a great degree fueled by the pandemic, has certainly assisted in the evolution of this technology. Things that weren't possible just a few short years ago are possible today. APIs and the ability to connect applications, and technology such as webhooks, have brought us tremendous flexibility in technology.

A Look Into Automatizer

The first thing you might wonder about, especially if you've ever been a system administrator, is how you create Automatizer privileges for users. Do you just grant them admin rights for the CRM?

Fortunately not. In Pipeliner, an administrator can grant privileges for Automatizer only. Users can create processes for themselves only, or can be given rights to create processes that everyone can use.

Automatizer is displayed as, and basically works like a 3rd-party application.
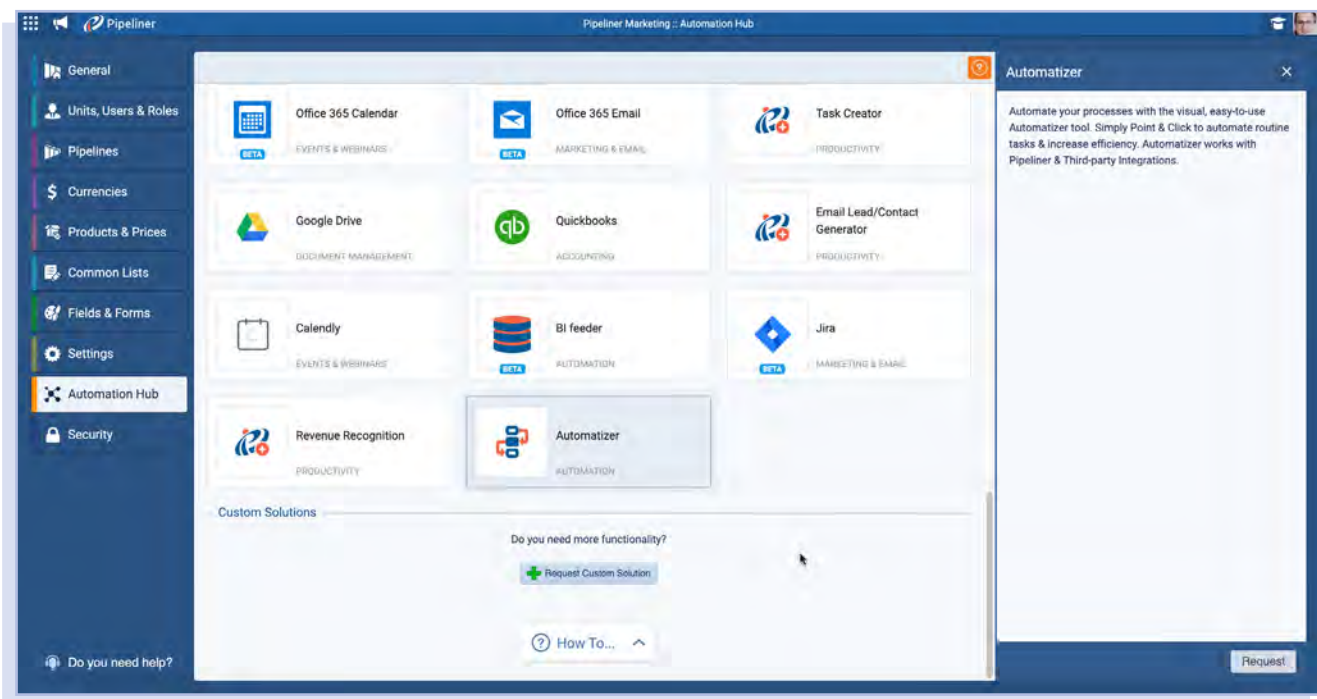
In a later chapter, we'll explore how to create a process from scratch. But since not everyone will be up for doing that, we have created a number of Automatizer templates that people can use right away. For example, here is a template that anyone can use to create a task for every new lead that comes in:
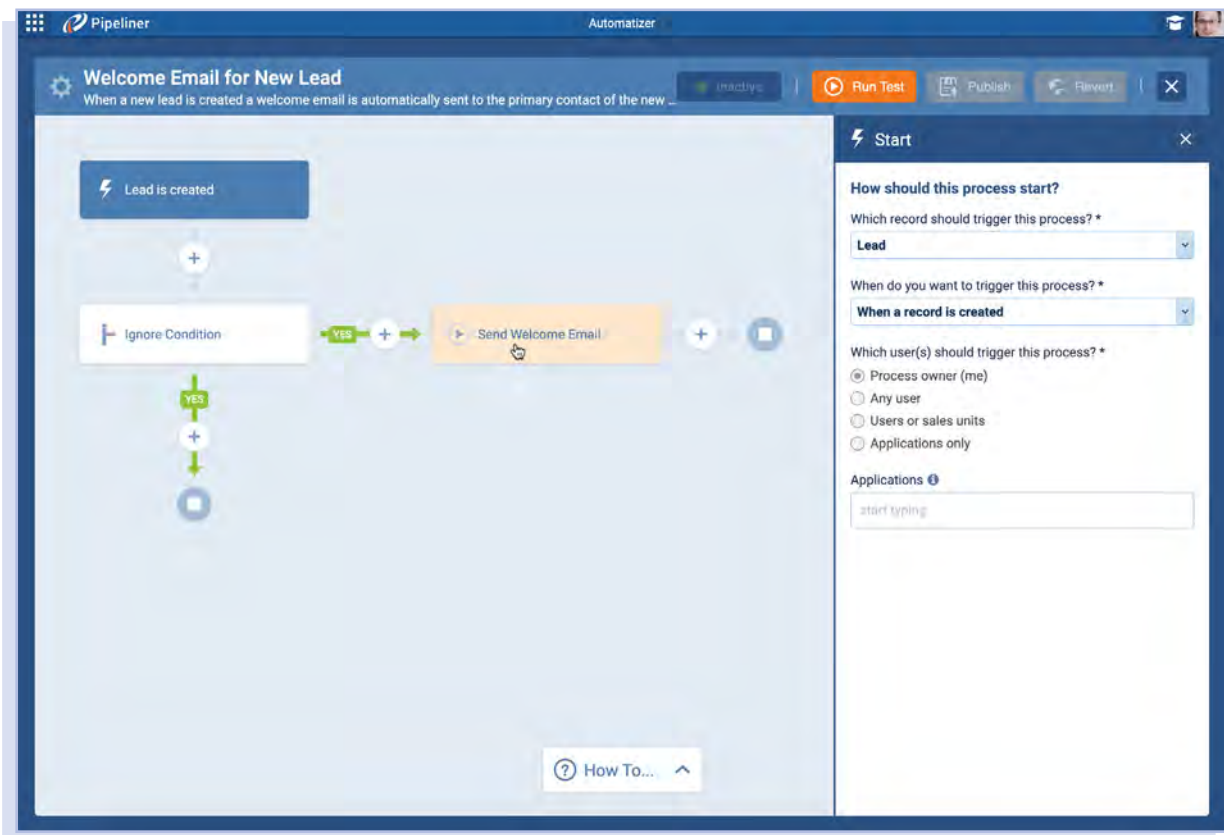
When the lead is created, a task is created so that the owner of the lead reaches out to the lead's primary contact. This template can be customized.
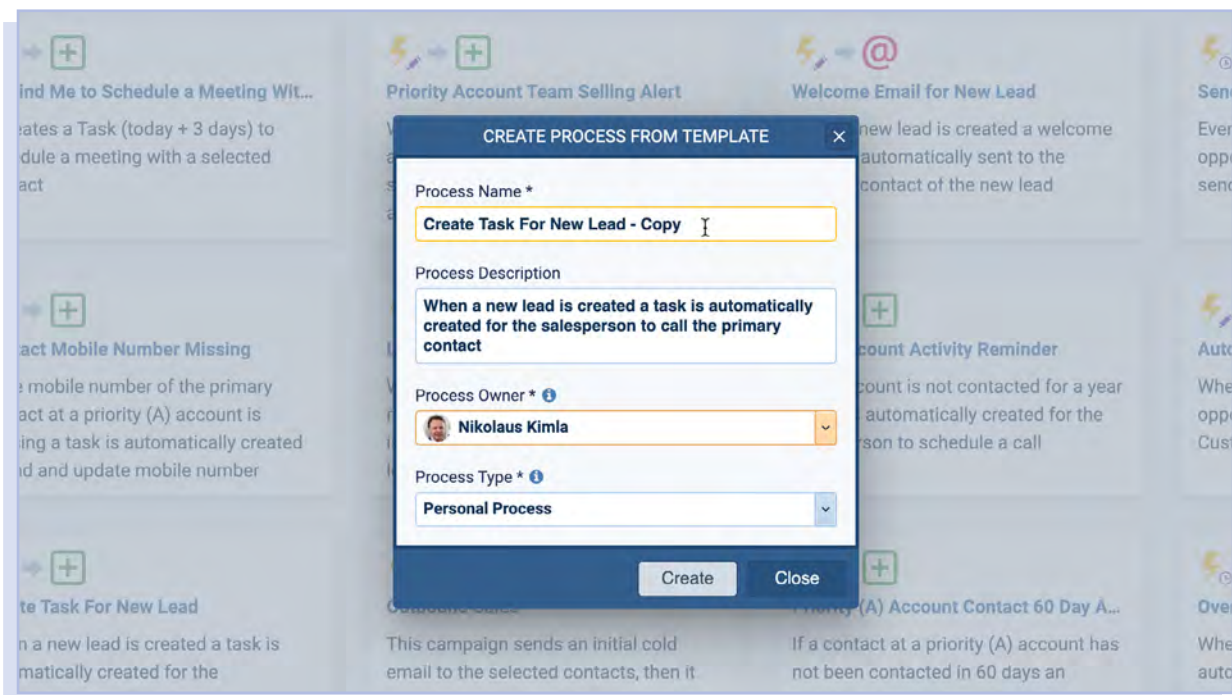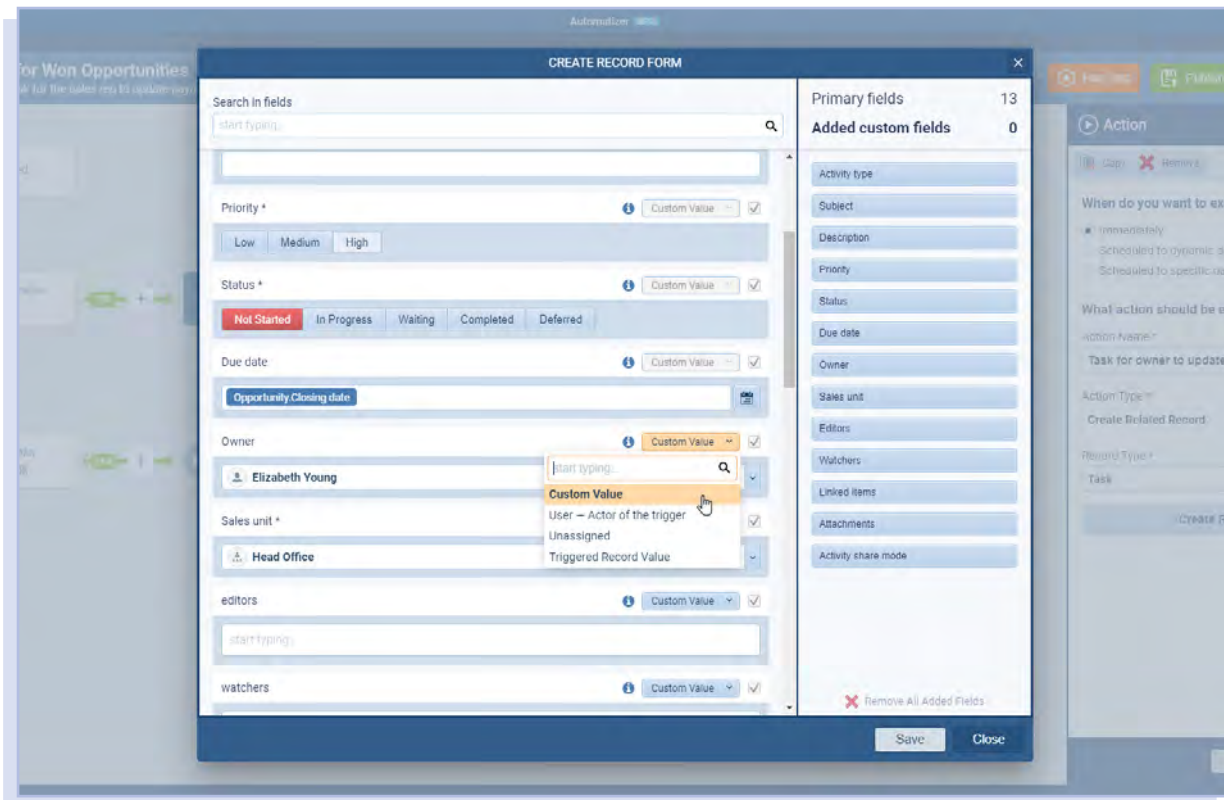
Now, automatically, whenever a lead is created, a task is created so that the lead owner will be reminded to follow up that valuable lead.

We've created a good number of ready-made templates for processes that can be customized to their needs.
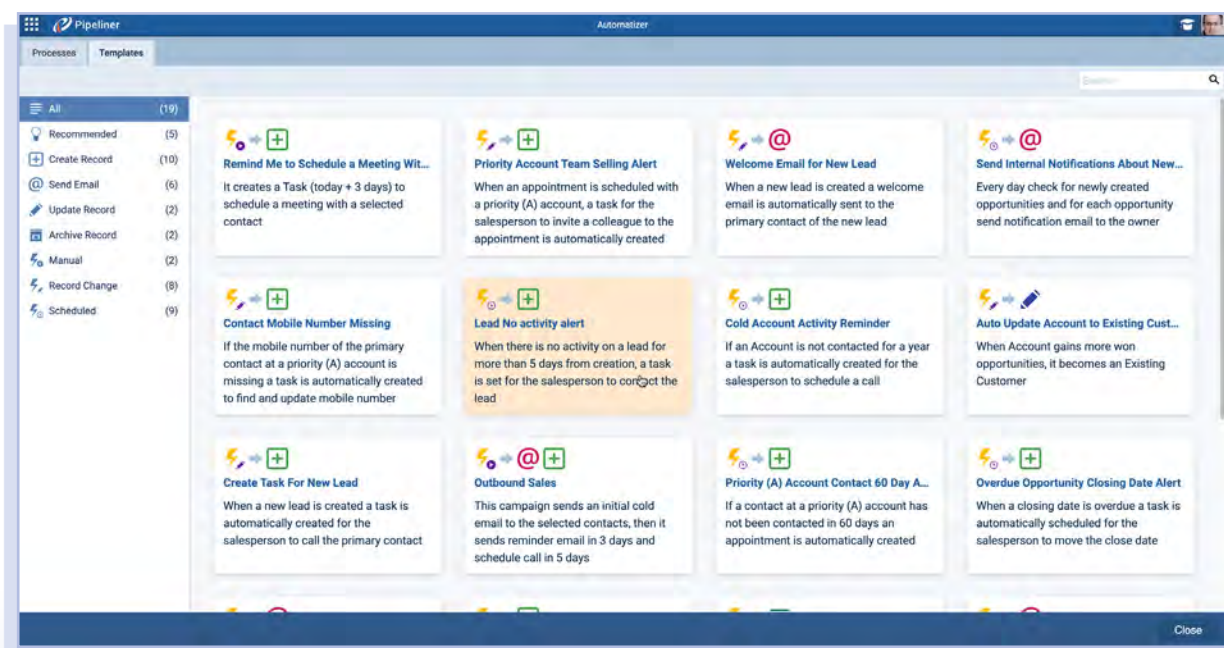
Here's an idea of a much more complex process. This is one I created to send multiple emails out to opportunities in our system.
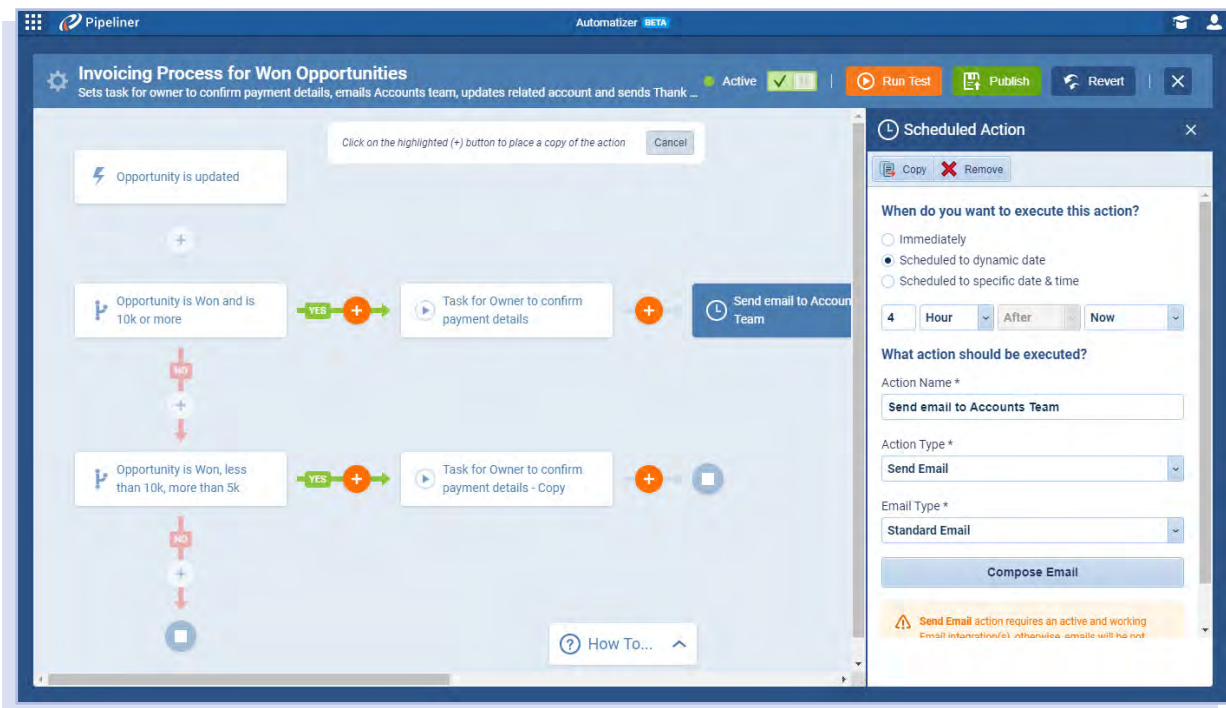
If the recipient doesn't open the email, a reminder is sent. Once the recipient opens the email, a second email is sent. All of these emails are personalized.
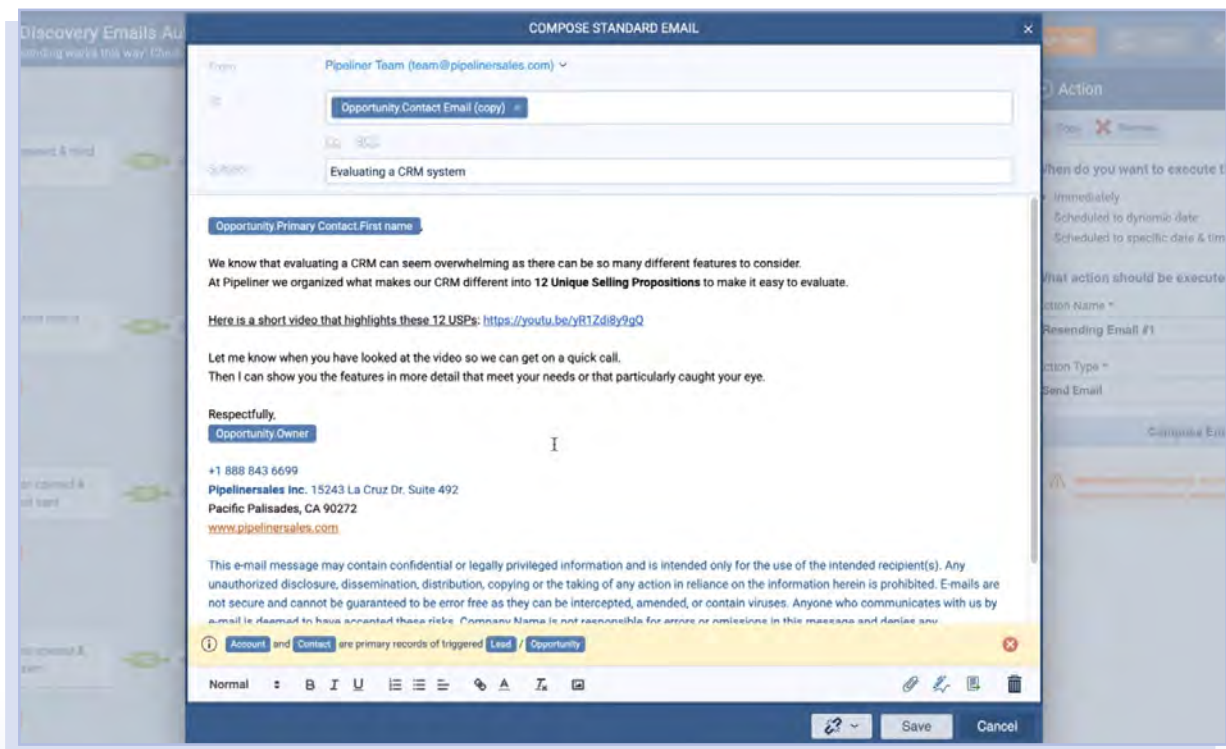
Now here is where the real value occurs: through this process alone, my sales team is saved in the neighborhood of 40 hours of work per week. That's 40 hours that can be better spent generating and closing sales. If you break that down per day, we've probably increased productivity somewhere around 2,000 percent. This could never have been done in the past.

Here's another example of a simple process that we've created:
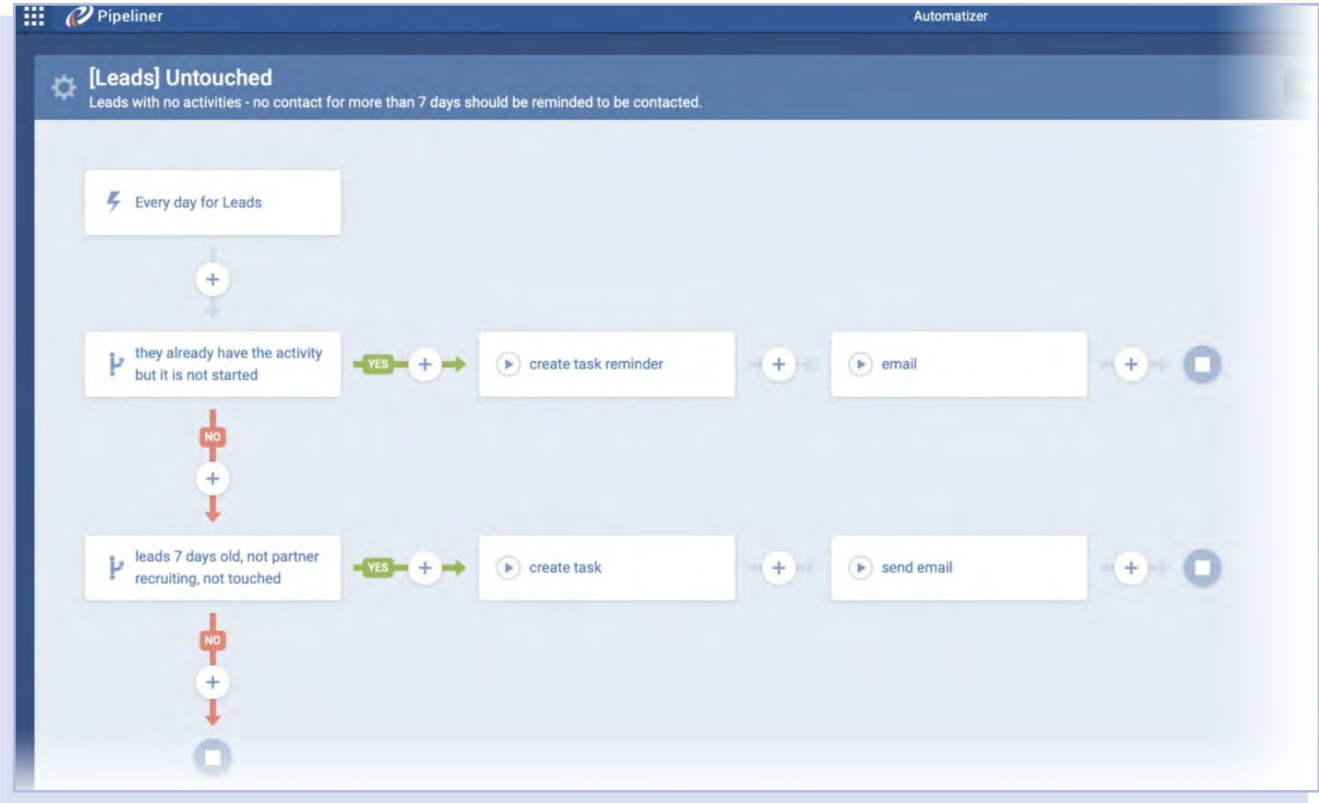
This process is activated when a lead is open but there has been no activity.

A reminder is sent to the owner of the lead reminding them to take the first activity for that lead. This lead can be in the form of an email or a text message.

7 days later, if someone still hasn't taken action on the lead, another reminder is sent.
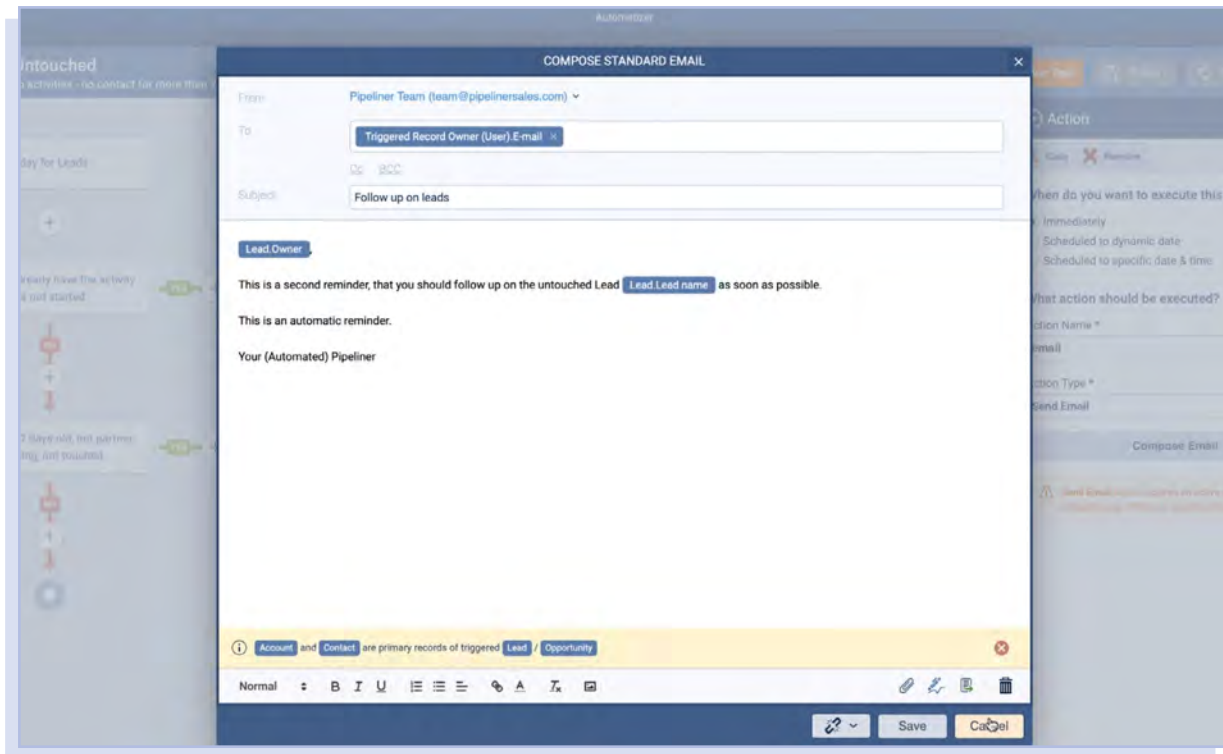
From a management standpoint, we also have a process that gathers all untouched activities from each salesperson so they can be followed up. In addition to reminding the salesperson to follow up a lead, the sales manager can also be reminded of all undone tasks so that various salespeople can be followed up. This alone saves another couple of hours per day.

Imagine having a team of 500 people, and the time saved through a process like this. It's a very valuable process, because following up leads is one of the most important actions a salesperson takes. Leads must be followed up as rapidly as possible, because the moment the prospect shows interest is the moment of highest possible conversation rate to an opportunity.

Cut-and Paste Processes

Not only can you cut-and-paste images and text for use in processes, but with Automatizer you can even cut-and-paste a whole process and add it to another process.

My 3 Predictions

I will emphasize once again, because it can't be said too many times, that Automatizer (or any other system for that matter) will not help you if you don't know your processes. Here are my 3 predictions regarding processes:

1. If you don't know your processes and don't have a good grasp on them company-wide, you will be out of business in the next 2 years.

2. If you don't get very busy sitting down and learning your processes, you will slowly but surely lose customers. Today, customers don't tolerate being handled sloppily. The customer can go somewhere else, because at the end of the day, there is no company, or person within a company, that cannot be replaced. Which leads to:

3. Looking into the future, not only can any person be replaced, but every *solution* will ultimately be replaced by something else. So to keep your customers, you will have to become and remain customer-centric. A customer is impatient—they want to be serviced well and in a timely manner.

So know your processes! The technology we've shown you in this chapter is not complex. The processes within your company, which you must fully understand, are much more complex. Any company has such processes, otherwise the company would not exist.

Optimization

A vital question any company must ask is this: Is the working environment efficient? Can that environment be optimized?

I would say that any company has tremendous capacity for optimization, through simple to complex processes. We've certainly learned about this through the pandemic, as companies have had to scramble and have their personnel working from home. It's a global business change in real-time. This was unthinkable just a few short years ago.

This move to home has likely exposed some processes that weren't thought of before. There have been processes that have existed in the area of "we've always done it that way" but they've never been documented. But now that people are working from home and must follow precise processes, and are connected to the rest of the company through these processes, they must be fully laid out and described.

Once a process is really implemented and is actually in use, it is no longer hidden. There is always a person or team within a company that creates processes, and then implements them. Processes are now transparent, no longer with hidden factors.

Automatizer makes process creation accessible to everyone, through a totally visual and easy-to-use interface.
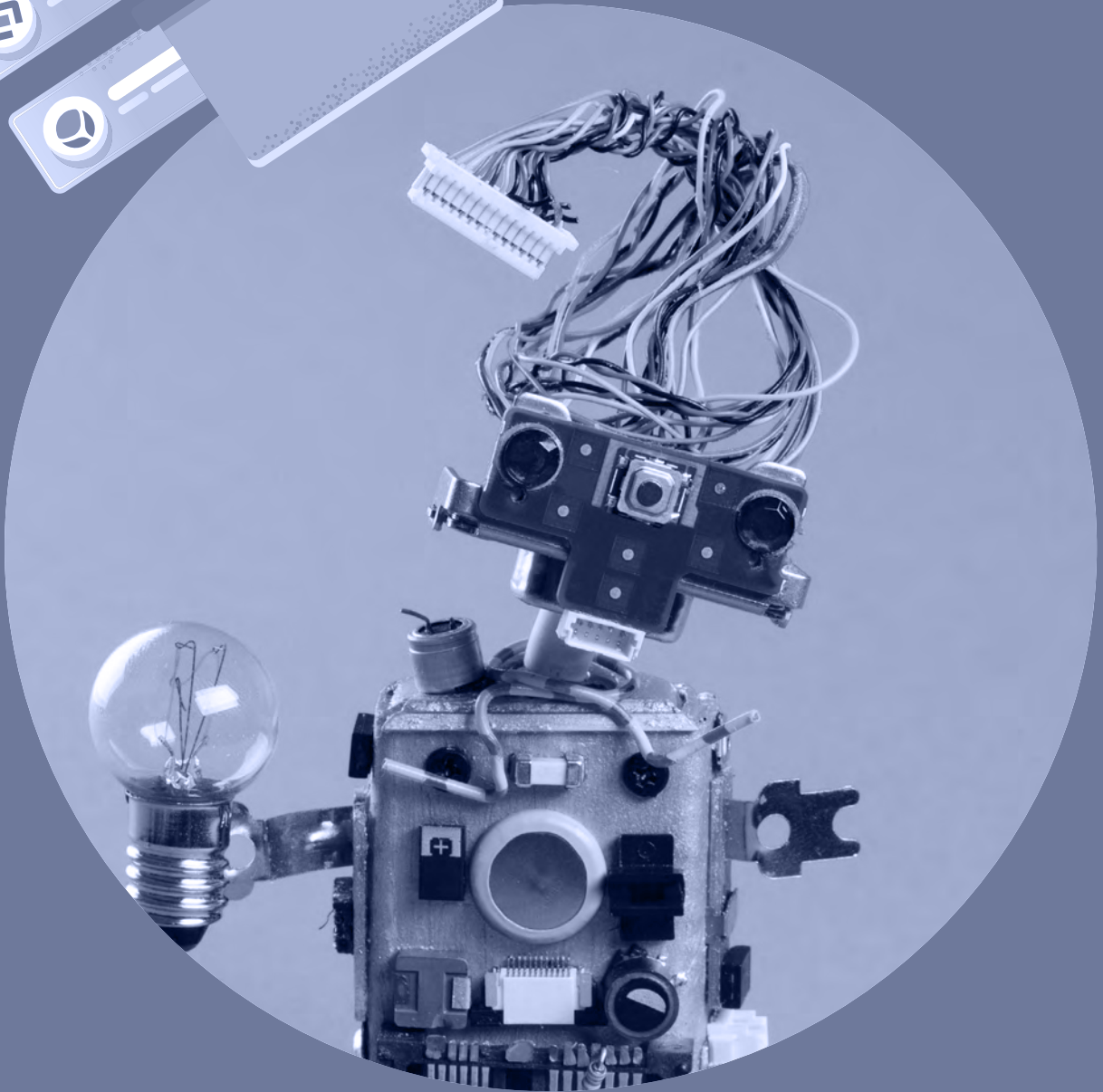
"I do not fear computers. I fear lack of them."

— ISAAC ASIMOV

Automatizer—Creating a Process

In the last chapter, we took a basic look at how Automatizer works. In this chapter, let's take up how Automatizer can be used to create a manual process. A manual process allows complete flexibility and a more "holistic" view of a record, as it's not necessarily dependent on other factors being completed before it is used.

Manual process creation is a functionality totally unique to Pipeliner CRM. We did this so that a user can create a workflow directly within a lead, opportunity, account or contact, and even also in an activity to activate it with a single click. Such a process can save an enormous amount of time, and is available nowhere else.

Let us say, for example, that in 80 percent of your proposals, you are selling the same group of 25 products from your product catalogue. Normally you would have to attach each single product; meaning, manually select a product and attach it, manually select the next product and attach it, and so on for the entire list of products you're including in an opportunity. Since you are doing this for 80 percent of your opportunities, it would eat up considerable time.

With Automatizer, you could set up a manual process that would add this whole list of 25 products with one single click, for every proposal in which these products are to be included.

In another example, let us say that you have a particular email that you want to send to a particular group of customers, on a regular basis. Instead of opening a blank email every time, inserting each address, copying and pasting the content from someplace, and then sending it, you can take care of the whole lot with a single click.

Let's walk through an example of how a manual process is created.

Manual Process Example

The process we're going to create is called "Key Opportunity Management." If a Pipeliner user is working on an opportunity, and discovers it meets their criteria for a key opportunity, they can attach this manual process to any of their records at that point.

Open the Automatizer from the Tools menu. Click on the Create New button:
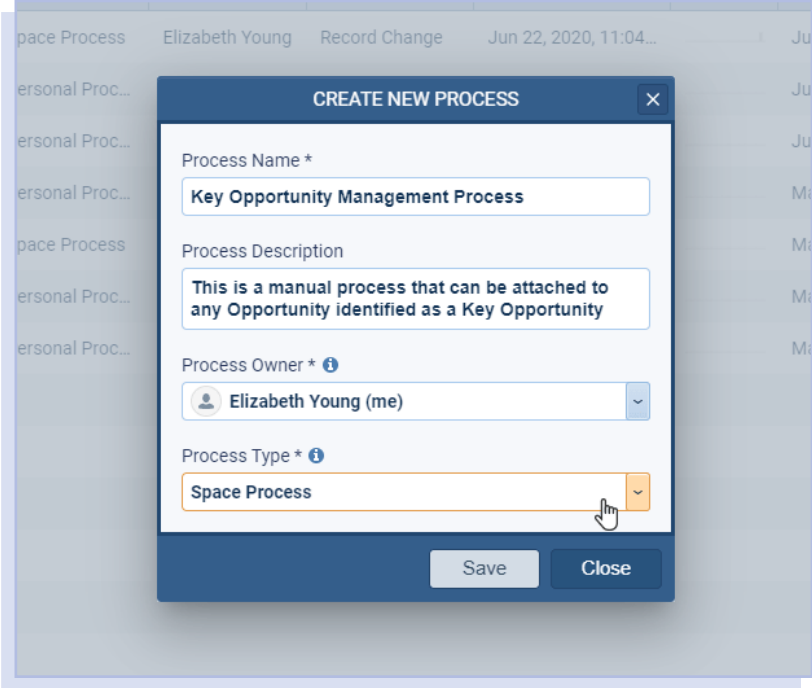
Click on Save to save your process. This will launch the Process Editor:
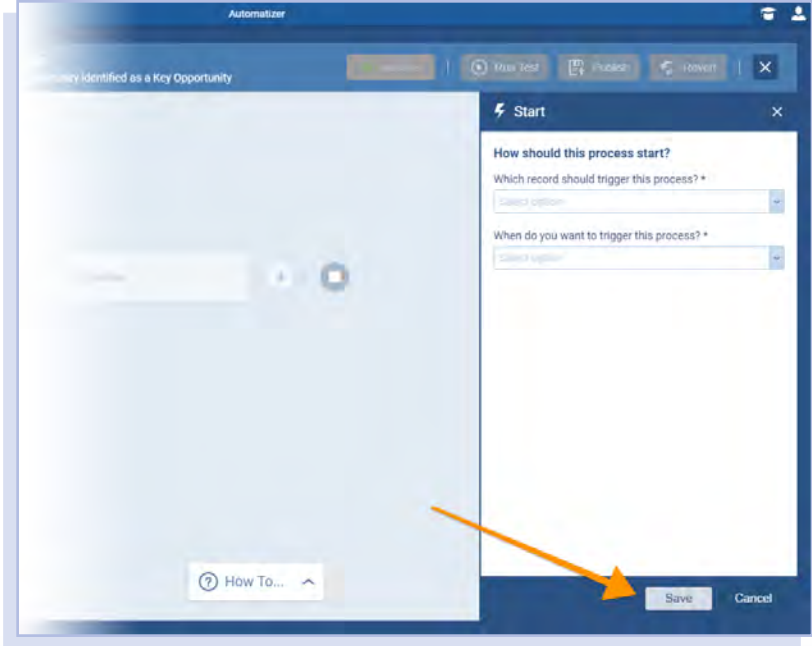
Click on Start to choose which record you want to trigger the process. In this case we're choosing Opportunity. In answer to "When do you want to trigger this process?" we're choosing "Manually." We'll limit the process to users who are assigned to the Direct Sales sales unit:
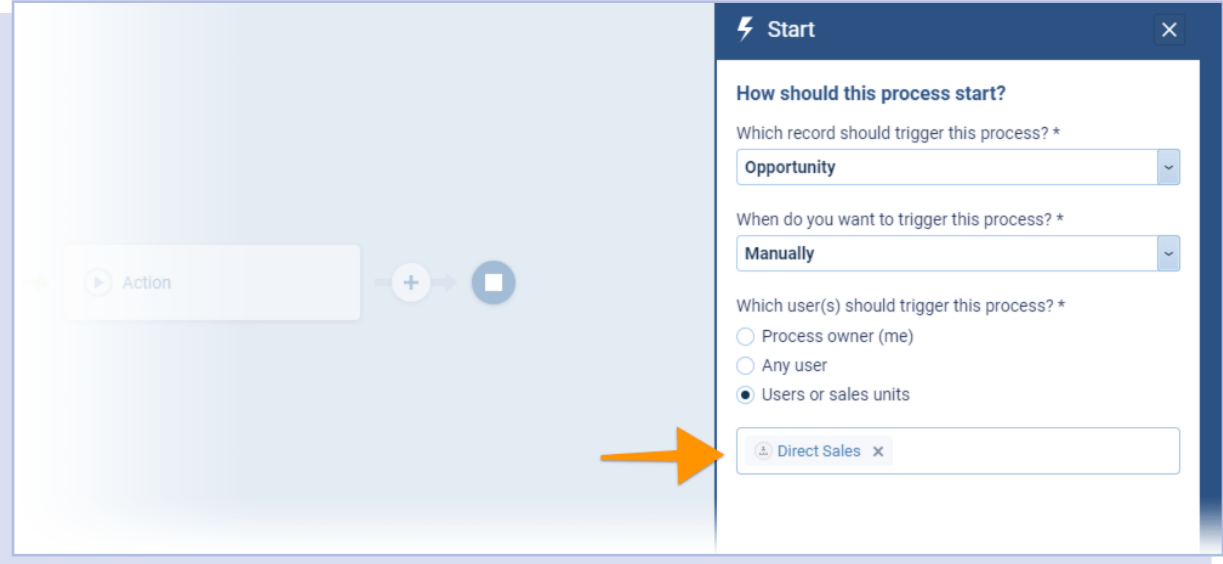
Then click "Save."
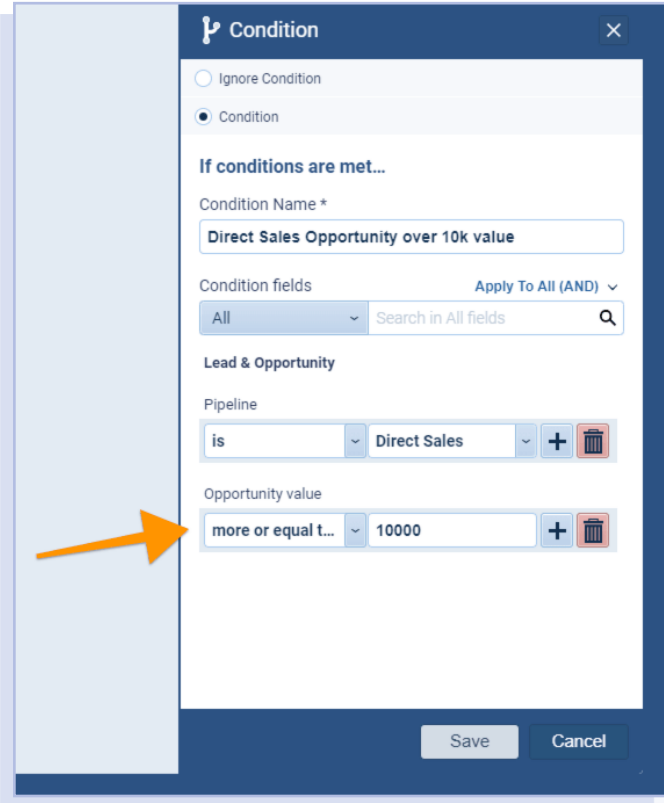
Conditions

Now we move onto which conditions under which the process will be attached to an opportunity. We could choose "Ignore Condition" to allow the process to be attached to any Opportunity record at all. But in this case we want to impose some basic control to qualify an opportunity as a "Key Opportunity." The opportunity must be in the Direct Sales pipeline, and have a value of more than $10,000. Here's what our criteria would look like:

Actions

The first action we want our process to take is to send a notification email to the sales manager to alert them that the Key Opportunity Management process has been activated for an opportunity.
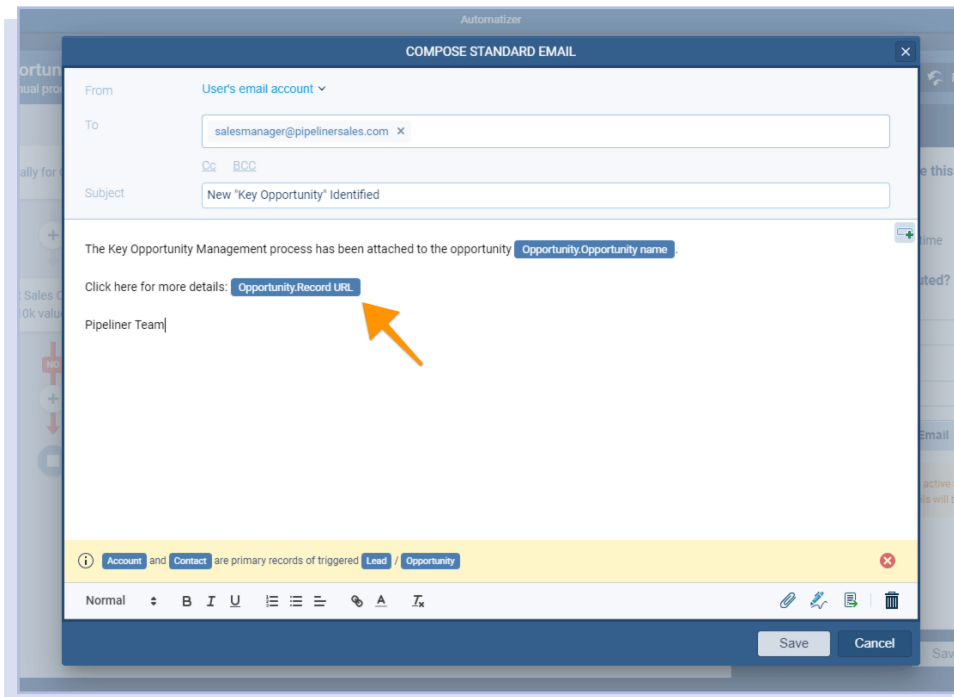
Note that we use the Record URL personalization field to allow the recipient to click through to the opportunity direction from the email:
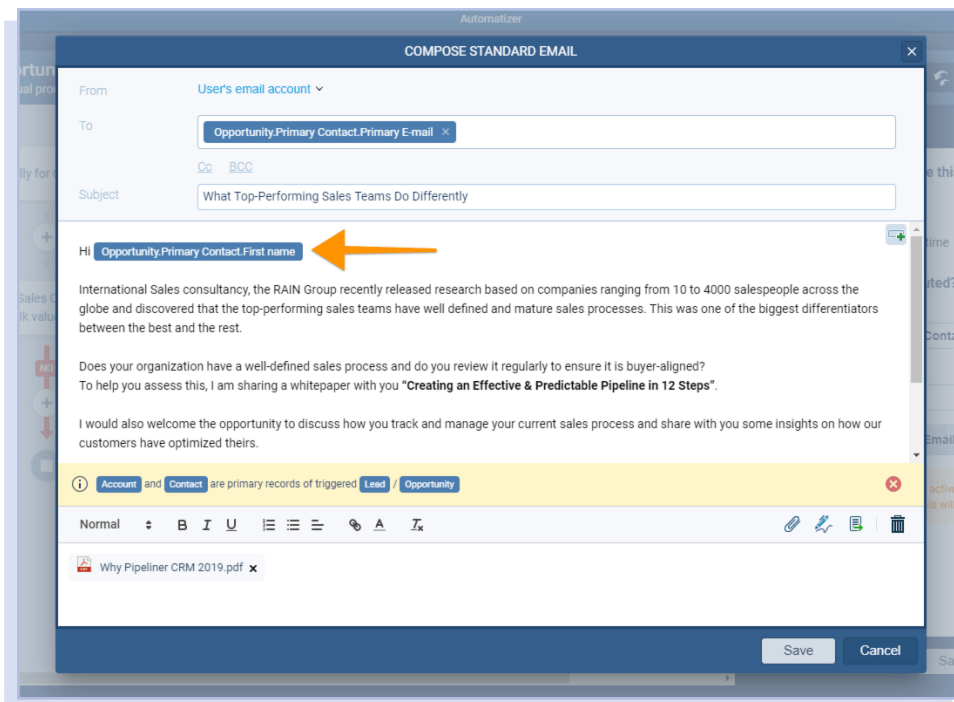
Next, we want to send one of our white papers to the primary contact for the opportunity:

And finally, we want to schedule a task to book an internal Key Opportunity Review meeting:
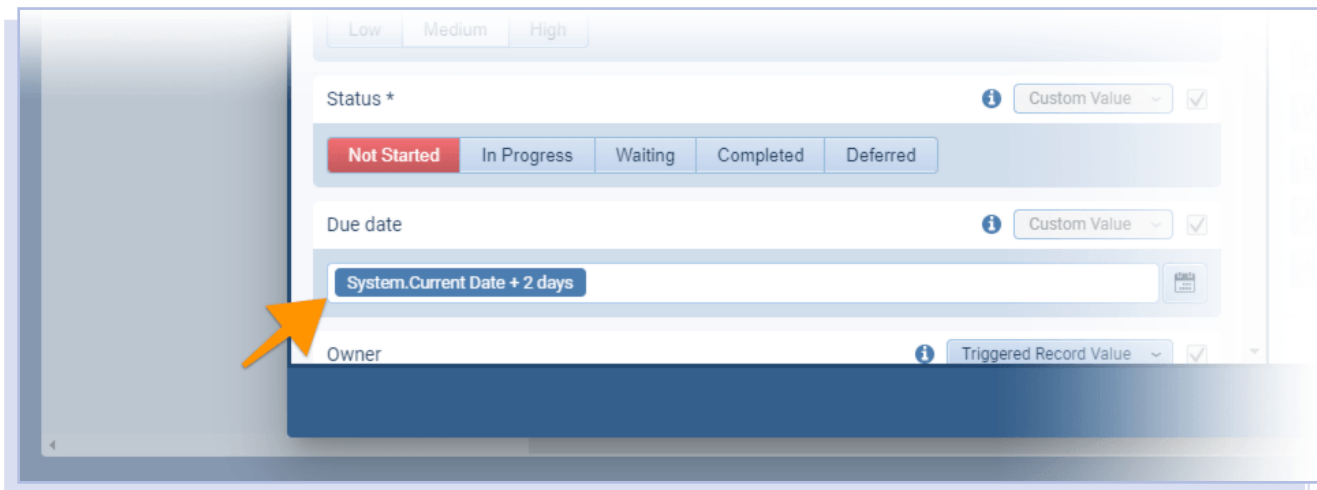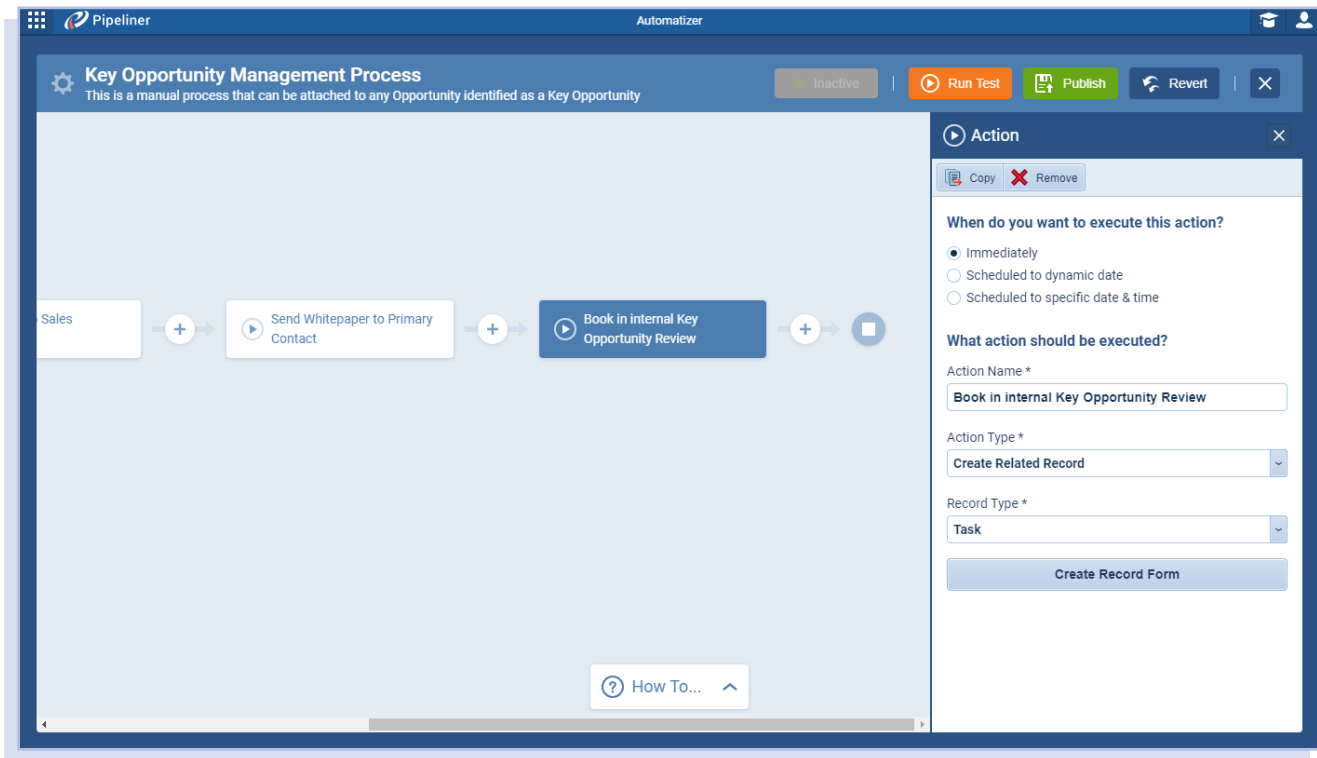
Click on "Save" to save the Action and "Save" again.

You'll need to publish to save your changes to update your process and, of course, you should always test your process before activating:
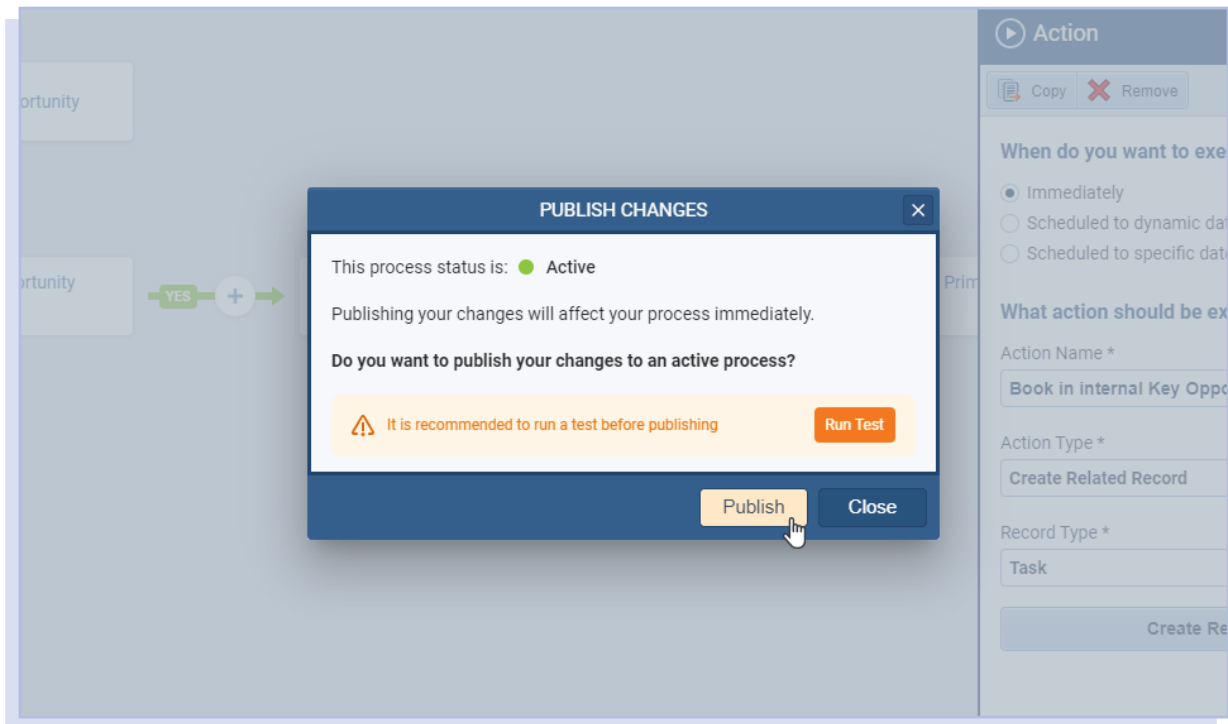
Attaching the Manual Process

From the main menu, when you select an individual record, you will see the Automatizer button on the menu. From the Automatizer button, you'll see the available manual processes that you can select from.

From the Opportunities menu, you can see our Key Opportunity Management Process in the Automatizer menu:
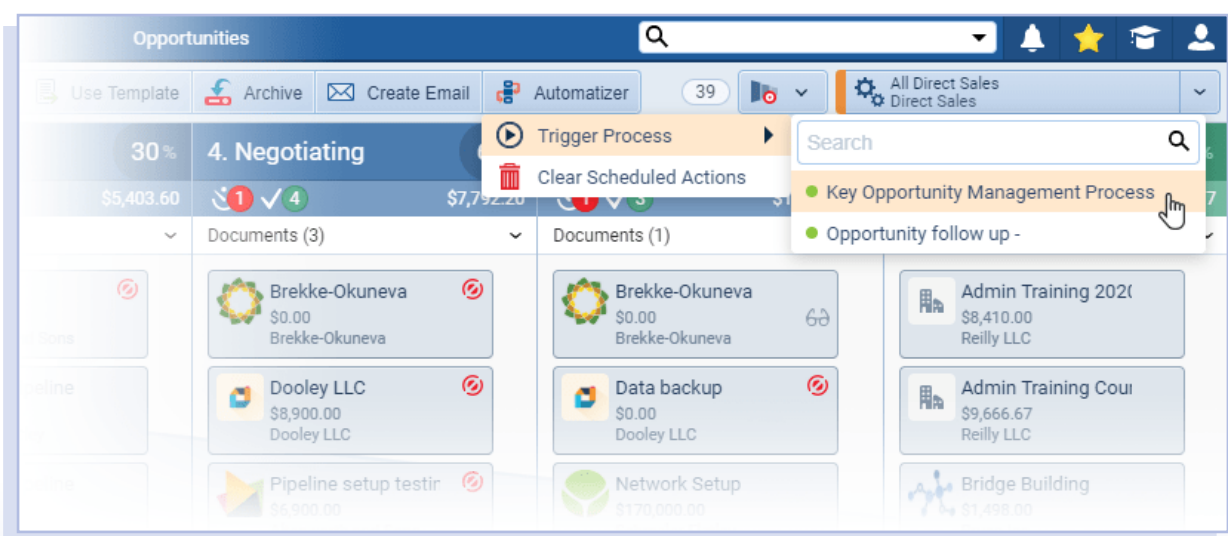
Select the process and you'll see a notification that the process is triggering:
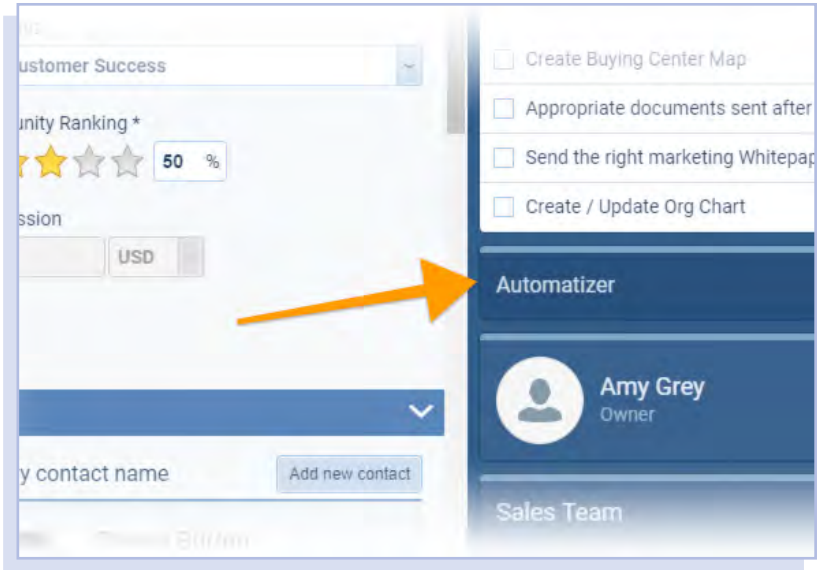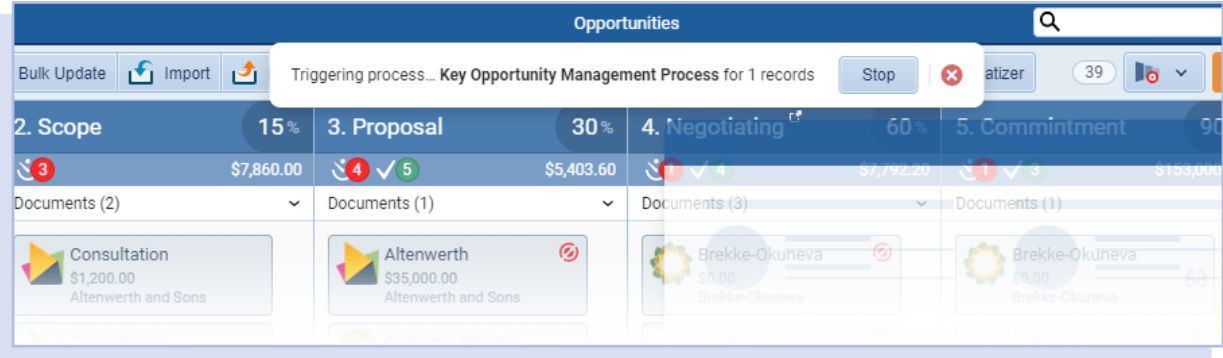
When you open up the record, you'll see an Automatizer widget below the Sales Activities Checklist in the panel on the right-hand side. Click on the chevron to open up this section:
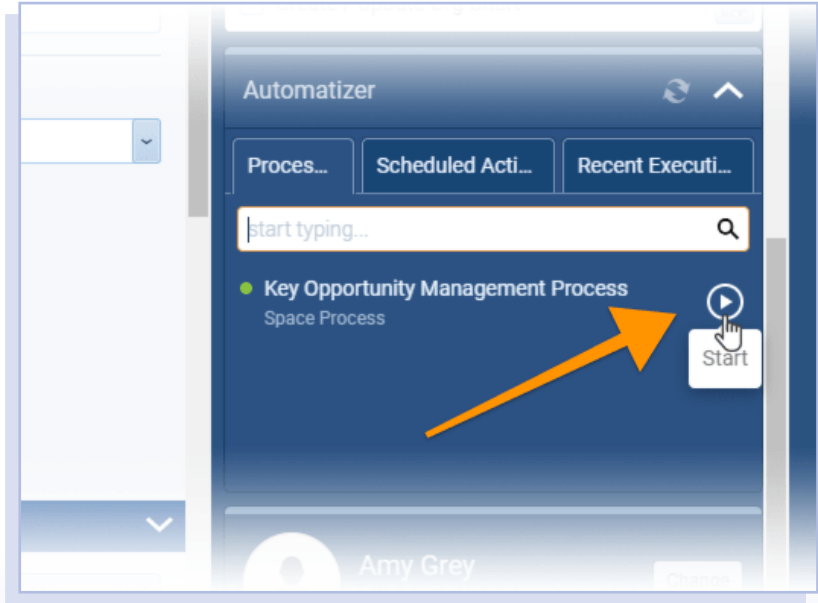
You can attach a process from the Processes tab. Click on the process and then select "Start":

The Scheduled Actions tab will show you all actions associated with this process that are due to be scheduled in the future:
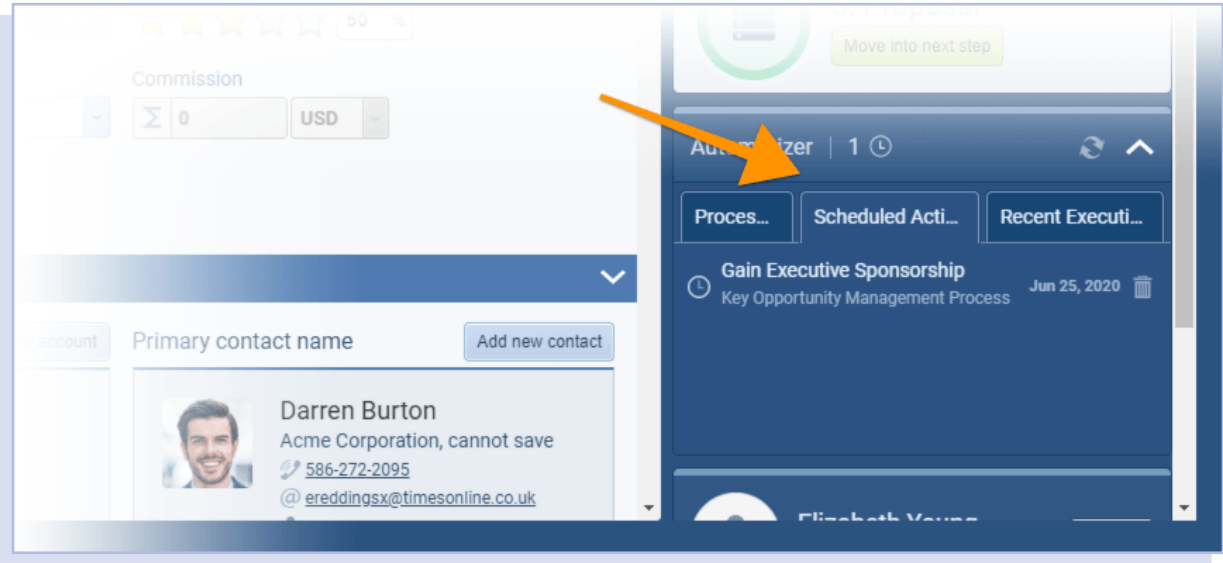
The "Recent Executions" tab is where you'll see all manual processes that have been attached to this record:
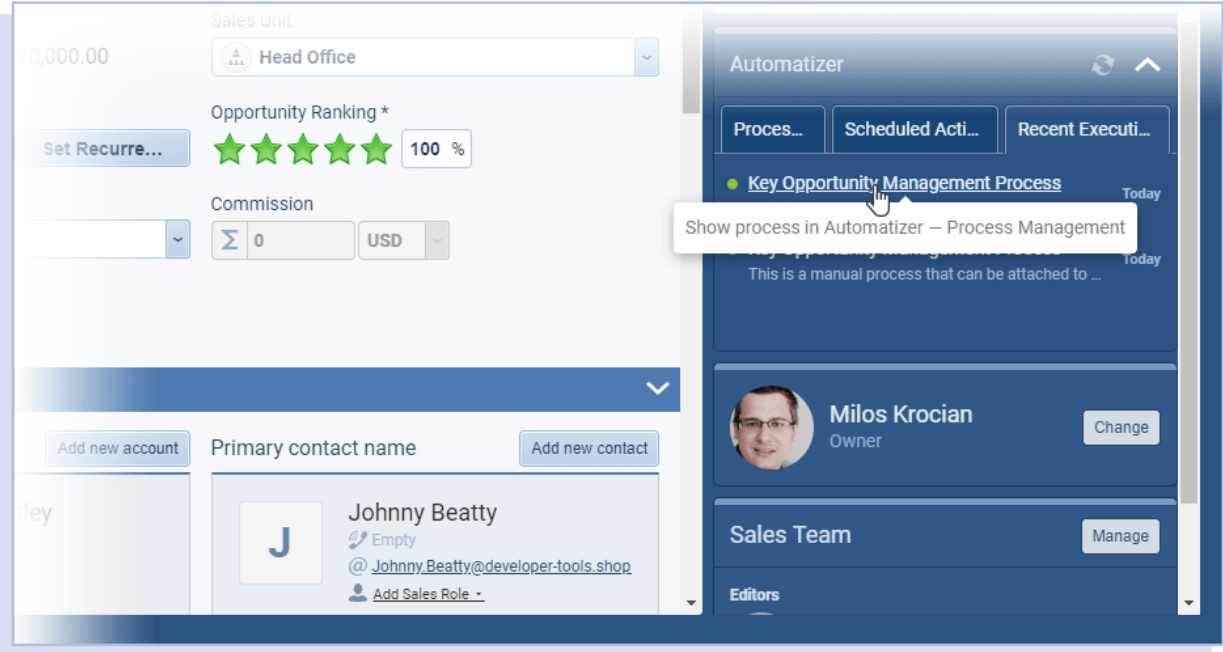
NOTE: You can click through to the process in the Automatizer from any of the links.

Once your process has been triggered, you'll be able to see the emails and activities as usual on the Activities and Feeds tabs of your record:
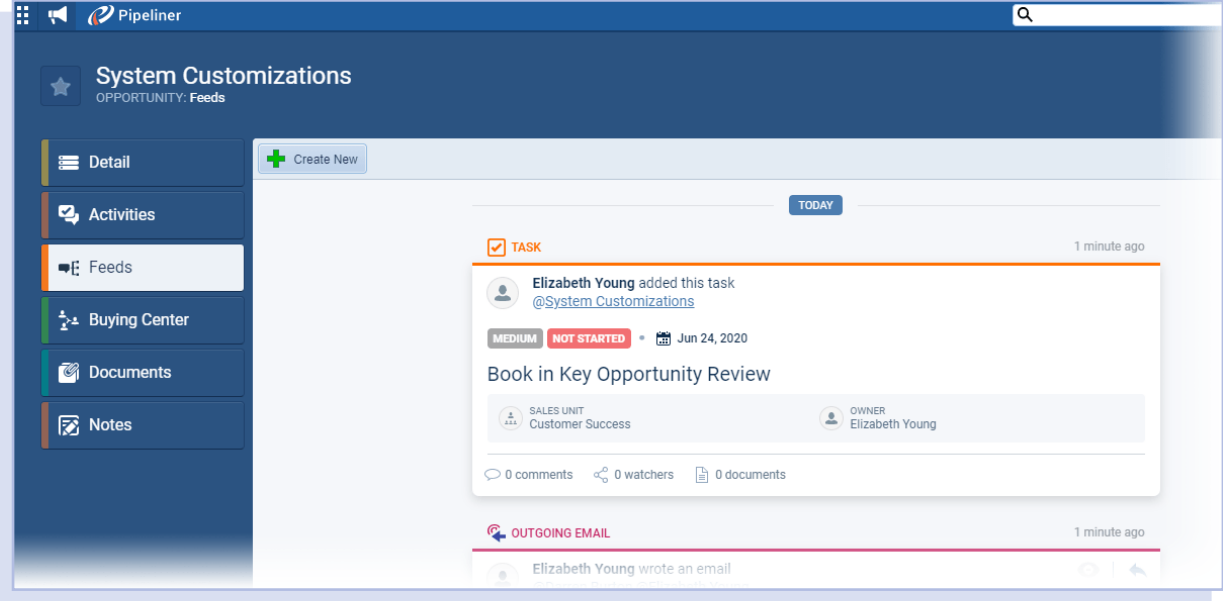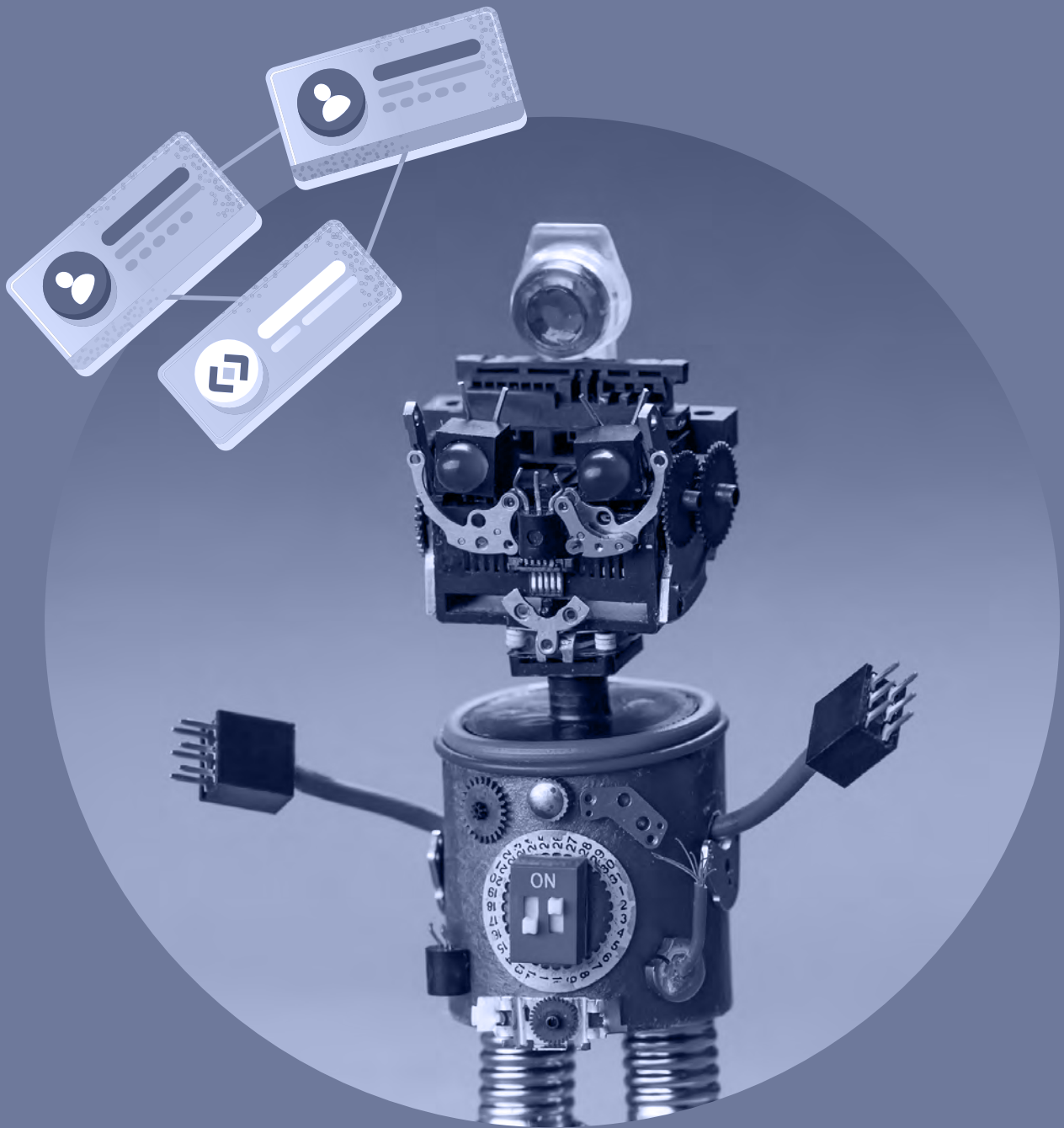
"*It's not a faith in technology. It's faith in people.*"

— STEVE JOBS
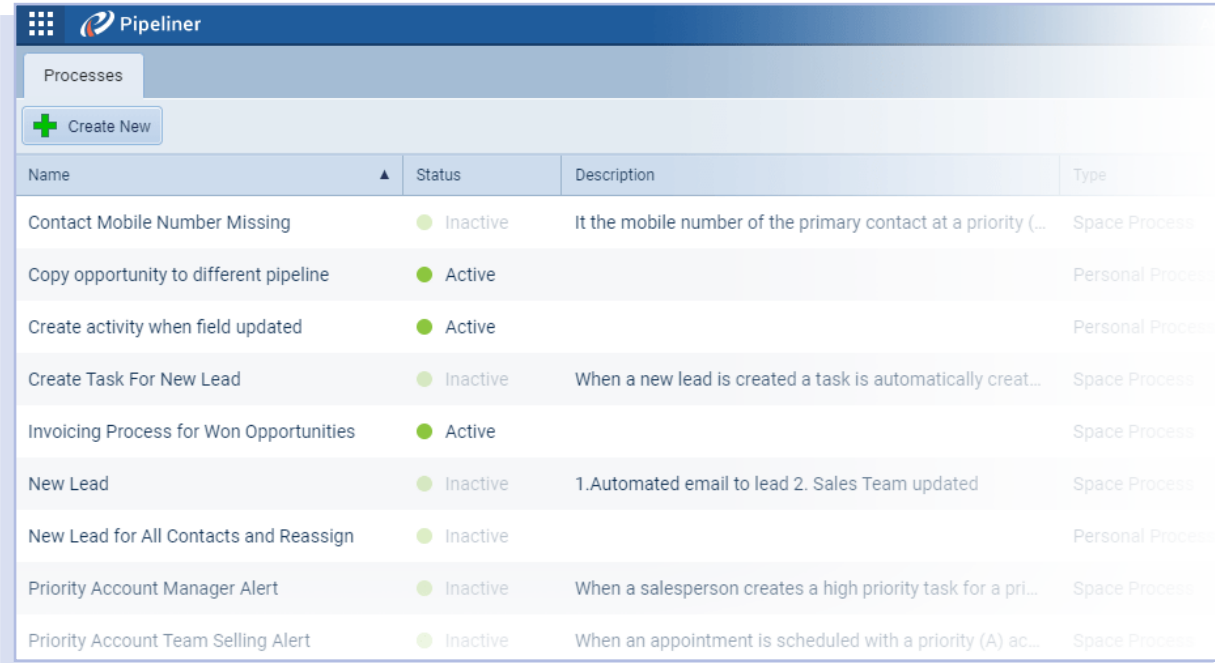
Automatizer:
The Process Manager

As I've said many times, Automatizer is the heart of CRM in the future. With it, you can create processes to replace repetitive actions, or tailor and utilize one of the many processes we have created for you.

Automatizer requires a clear, easy-to-use tool to manage all of your processes, and therefore we created the Process Manager. Like all of Pipeliner's functionality, the Process Manager is completely visual and intuitive, and is the hub for tracking all the processes that are created and running for your organization.

When you open Automatizer, you'll see a list of all the current processes. You can add new processes using the "Create New" button. Refresh the list, and also search for specific processes by name or filter by Process Owner, and/or Process Status.
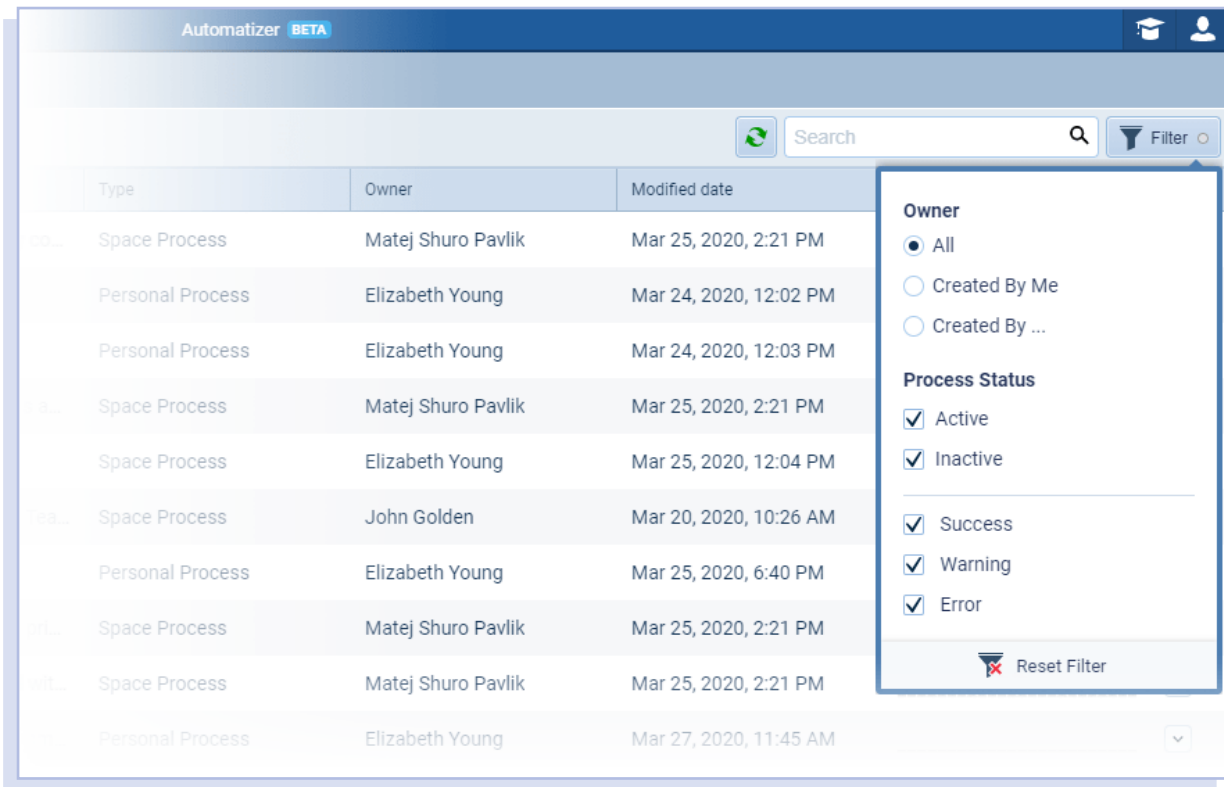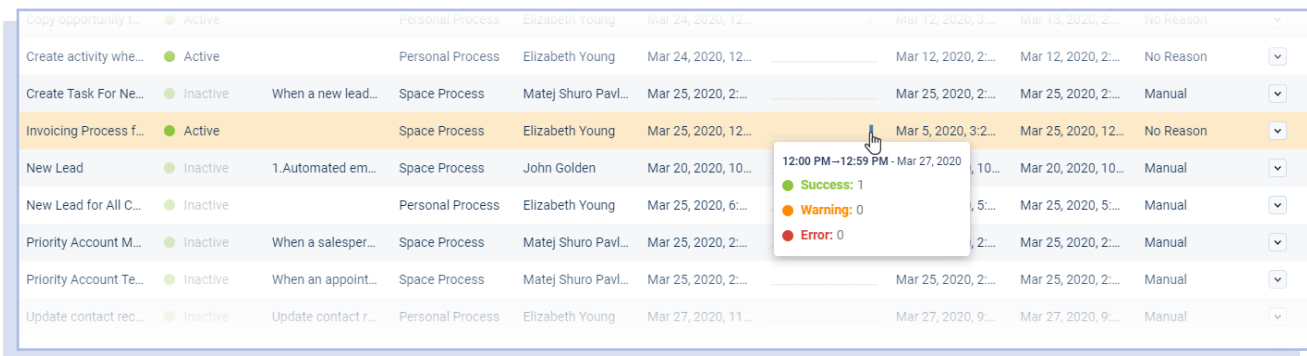
In common with other List Views in Pipeliner, you can customize the columns that you want to see in the view and reorder the columns to make it easier for you to manage the process list.
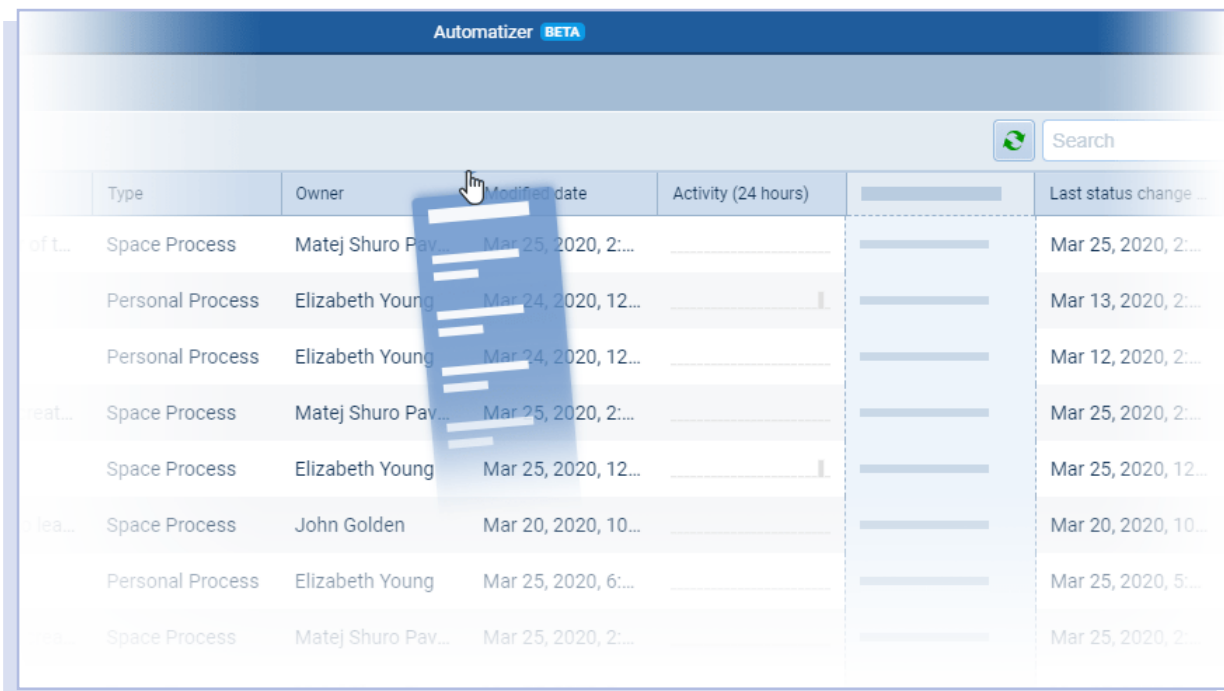
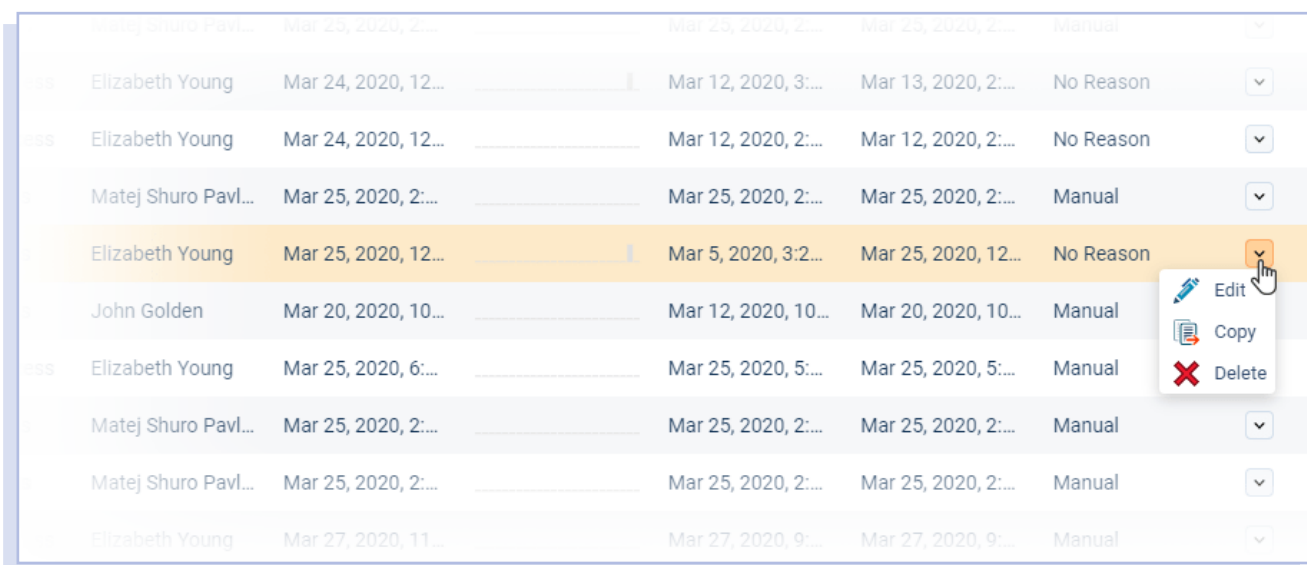# Key columns in the Process List

The "Status" field gives you an instant visual indication of Active (versus Inactive) processes. The "Activity (24 hours)" column gives you an hour by hour snapshot of the times that the process has run over a 24 hour period. Hover over this column to see a summary quick view of the run statistics for the process.

Click on the drop-down arrow at the end of the list on the right-hand side to "Edit", "Copy" or "Delete" a process.

As Automatizer has multiple trigger types, you can also display the Trigger Type for each process in the Automatizer Process Manager list view.
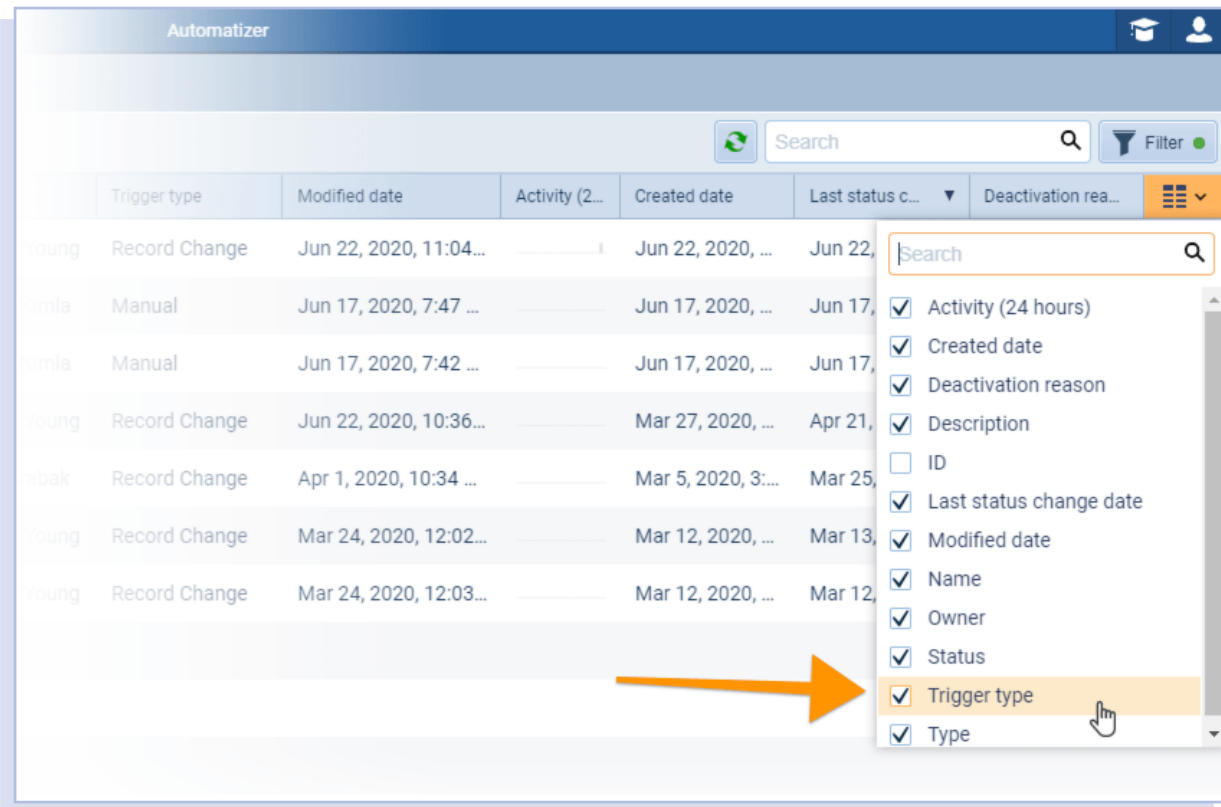
Clicking on an individual process will open up a detail panel on the right-hand side.
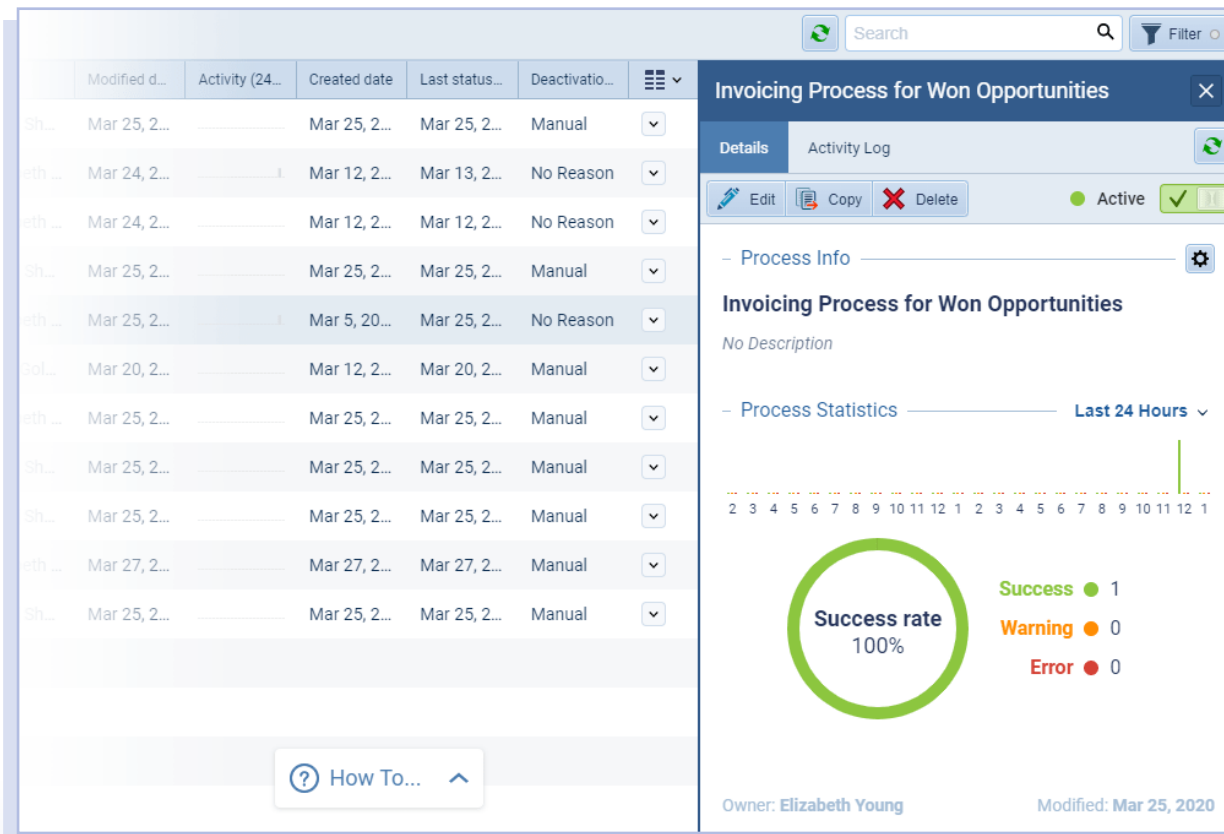
Details Tab

In the "Details" tab, you'll be able to Edit, Copy or Delete the process, refresh the view or toggle the process to Active/Inactive.

Click on the gear icon to update the properties of the process. You'll then able to update:

- **Process Name** — the name of the process.

- **Process Description** — add or update the description.

- **Process Owner** — the Process Owner will be the only user able to update the process and will be the user to whom all notifications are sent. You'll only be able to update the Process Owner if you have Manager rights.

- **Process Type** — you'll only be able to change the process type if your user role allows you to create/edit both Personal Processes and Space Processes. A Personal Process is one that can only be triggered by the Process Owner whereas a Space Process can be triggered by the users specified when the process is created.

In the Process Statistics section, you can get an overview of the run statistics for the "Last 24 Hours", "Last 7 Days" or "Last 14 Days."
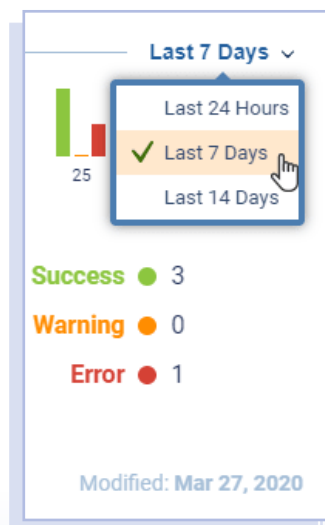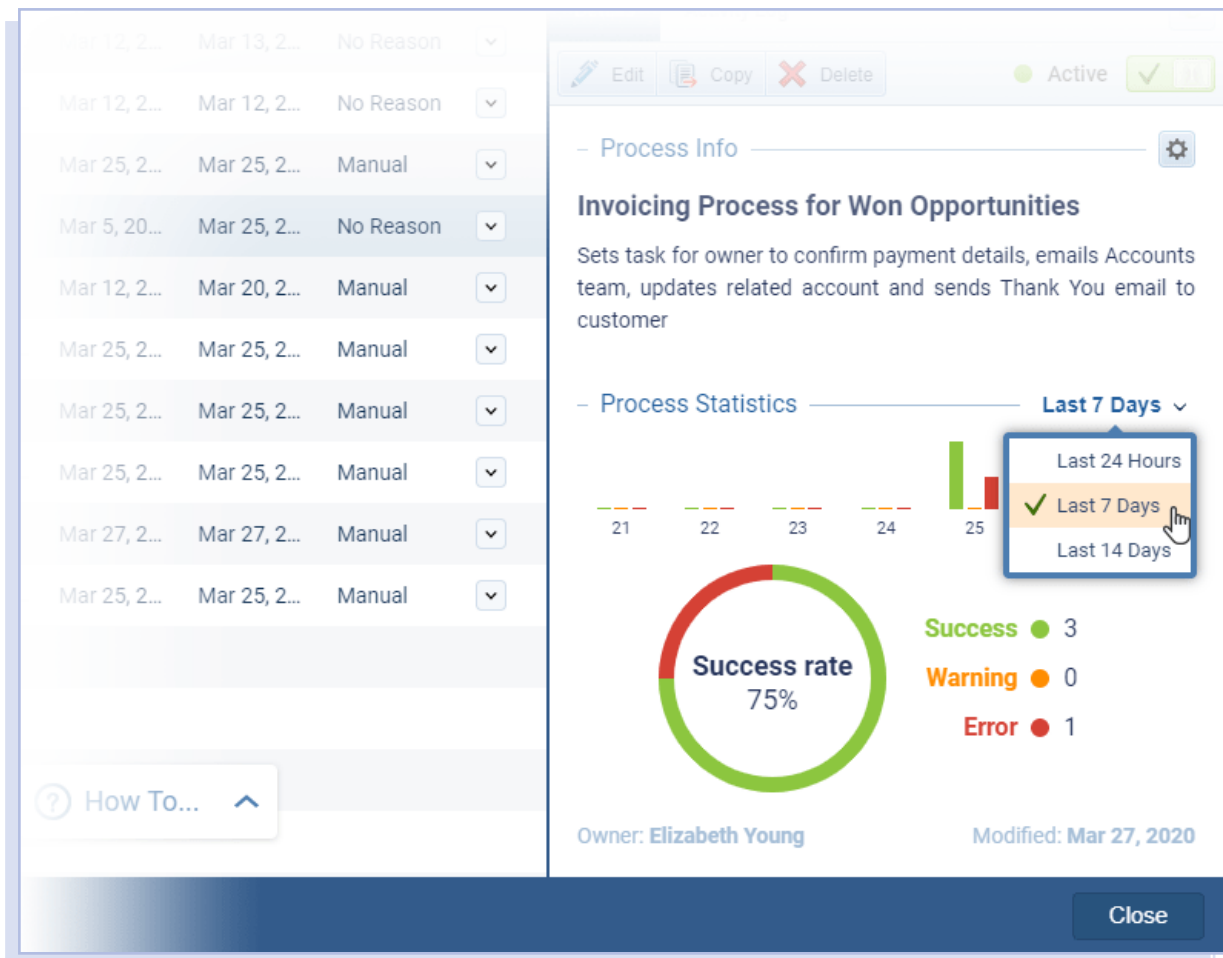
Remember, it has been said that "You cannot manage what you cannot measure."

Process Notifications

There are three main types of notification used to update the Process Owner on the status of their processes:

- **Success** — The process ran successfully.
- **Warning** — an Action in the process ended with a warning.
- **Error** — An Action or Condition ended with an error.

Each unique/non-repeating message will be sent after the process ends, but when the message is the same and repetitive it will be sent only once each 1 hour, irrespective of how many times the process is triggered within that period.

Stop — when the process ended with an error the last 20 times it executed. Notifications about a Stop are sent even when the user has disabled notification sending for Automatizer.

There is much more that can be done with the Process Manager. It saves an enormous amount of time, just as Automatizer itself saves tremendous time for you and your team. As mentioned earlier, just at Pipeliner, one single process we created is saving our team some 40 hours per week, and overall we're saving in the neighborhood of 2,000 percent. At this point we would have to hire new personnel to perform the tasks that Automatizer is performing for us. Think of what it could do for you.

Automatizer is definitely a powerful tool for us now, and into the future.
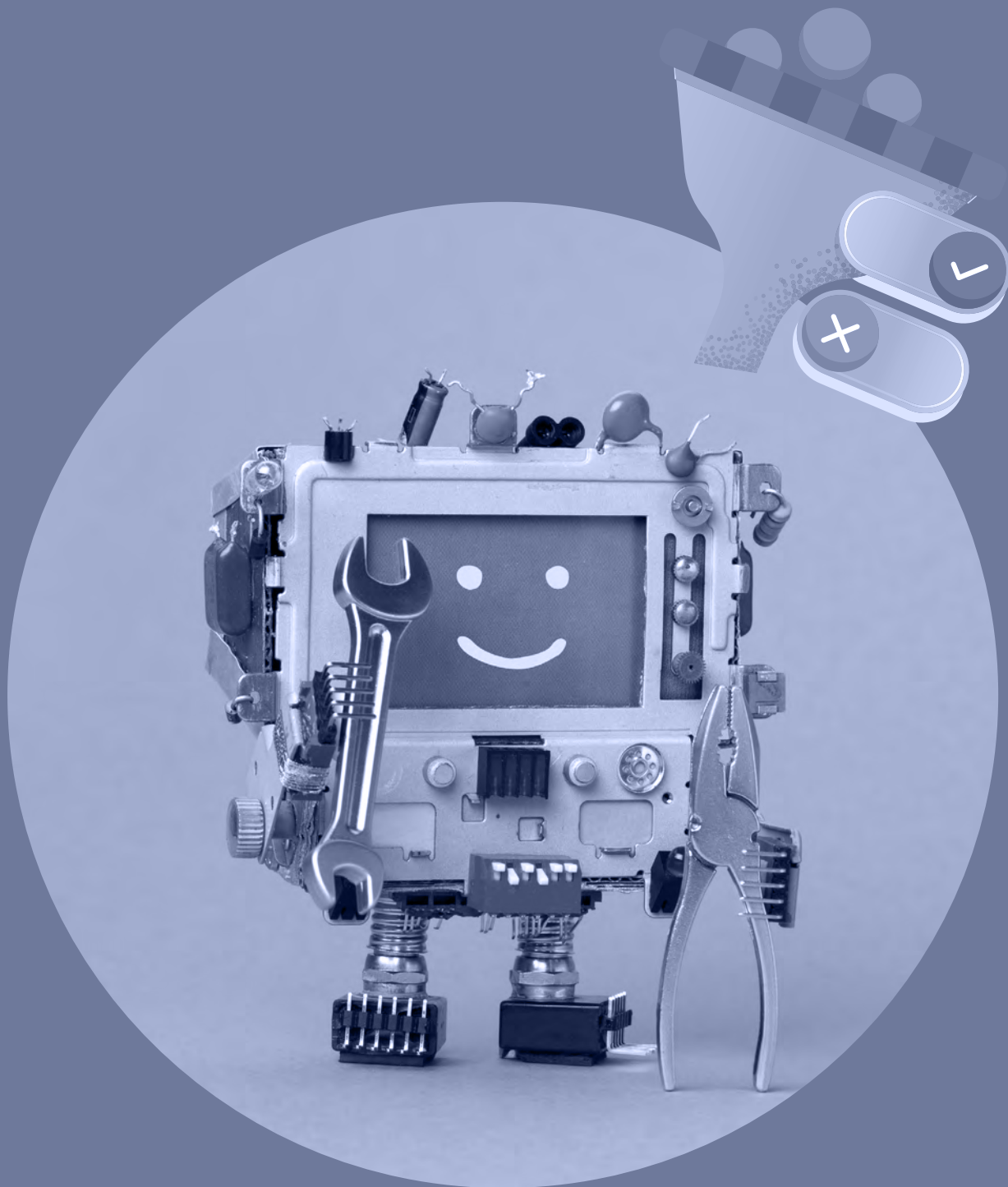
"The advance of technology is based on making it fit in so that you don't really even notice it, so it's part of everyday life."

— BILL GATES

What Automatizer Means in the Big Picture

In wrapping up this ebook, let's have a look at what Automatizer really means in the big picture.

Traditionally, company growth has followed a regular trend. For example, as the staff becomes more numerous within an organization, you need someone responsible for the upkeep of all the laptops and devices. That would be IT. IT is also responsible for your data center, whether on-premises, in the cloud, or a hybrid.

If your company isn't automated, rapid growth can only mean adding more and more people. For that, you need office space furnished with desks and chairs. Staff need some infrastructure, too, such as break rooms with kitchen facilities, and free coffee and water. Some startups have gone totally overboard with wildly designed environments, color-coded t-shirts, game rooms and other elements designed to make the staff feel entitled.

We can clearly see, though, that this trend has completely disappeared. Not only because of covid-19 (although that certainly was a contributing factor) but, because of automation, we no longer need most of these extravagances. A fantastic example, one I give often, is Amazon. This is a company largely operating on automated processes, and they're now the most successful company on the planet, with their CEO being the richest man in the world.

Today, there are many factors of company structure that can be automated, which provides enormous cost savings. Many departments become less important when you have a real digital automation structure.

All of this breaks down into unbelievable changes in 4 major areas:

1. **People versus technology.** I often find myself in arguments with anyone who says that "technology sucks." The fact of the matter is that technology is never the problem. Technology is a constant, while people are complex with ever-changing issues. I believe that if we examine the last 8 months, we'll clearly see that technology has not been the problem, but human beings have.

    Human beings are unpredictable. You never quite know what they're going to do. They get sick. They take unexpected vacations. You never know how loyal they are—you build a relationship with them but one day they are gone.

    Sometimes the knowledge of the job disappears with them. As an example, a banker within a particular private bank can build great relationships with customers. The question is, are people more aligned to that banker, or to the bank itself? The fact is that you can bank anywhere. If that banker moves on, he or she very possibly takes customers with them.

    Building a structure with human beings, as we can see, is tremendously costly.

2. **Budget considerations.** Before you build this structure, you must budget out the financial resources required for hiring, educating and onboarding. In sales, we talk about "sales yield," which is the time it takes for a salesperson to become productive.

    As you grow, you need layers of management. A pointed question could be asked about a manager: in addition to managing, are they also producing revenue? That person might be costing more than they're making for the company.

3. **Internal conflict.** As a company grows, the more internal conflicts can occur. I'm not saying such conflicts are impossible to manage—otherwise why would we have so many large companies? Of course when we examine demographics, the majority of US companies are small and medium companies.

4. **Focus.** A company is constantly focusing on product innovation, marketing and sales. As they do so, they are learning. The more lessons learned, the more efficient the company becomes. From efficiency comes productivity, and from productivity comes profitability.

If a company becomes more productive with fewer staff, there is reduced payroll, vacation, and sick pay. The company is also far more profitable. And that is where real automation is leading—higher productivity and profitability without the human risk involved. Conversely, the more human error involved, the more of a decrease in company performance. That also means a decrease in profitability.

Once more the best example I've ever seen of fewer staff, applied automation and outstanding profitability is Amazon—something they've achieved in a very short 25 years. It's incredible to think about the fact that for years after the company was founded, it was ridiculed, and it was said that Amazon would never turn an actual profit. Look at them today.

This is precisely the direction in which we're heading with Pipeliner CRM's Automatizer feature. Just within our own company, we've evolved hundreds of processes with Automatizer that we can instantly put to work. Without them, he'd have to hire (or re-hire) a considerable number of employees. We have tremendously increased company productivity, and greatly reduced the risk factor and cost.

Guess what? With Automatizer, so can you!

The Pipeliner Universe

Supporting sales in all its forms.
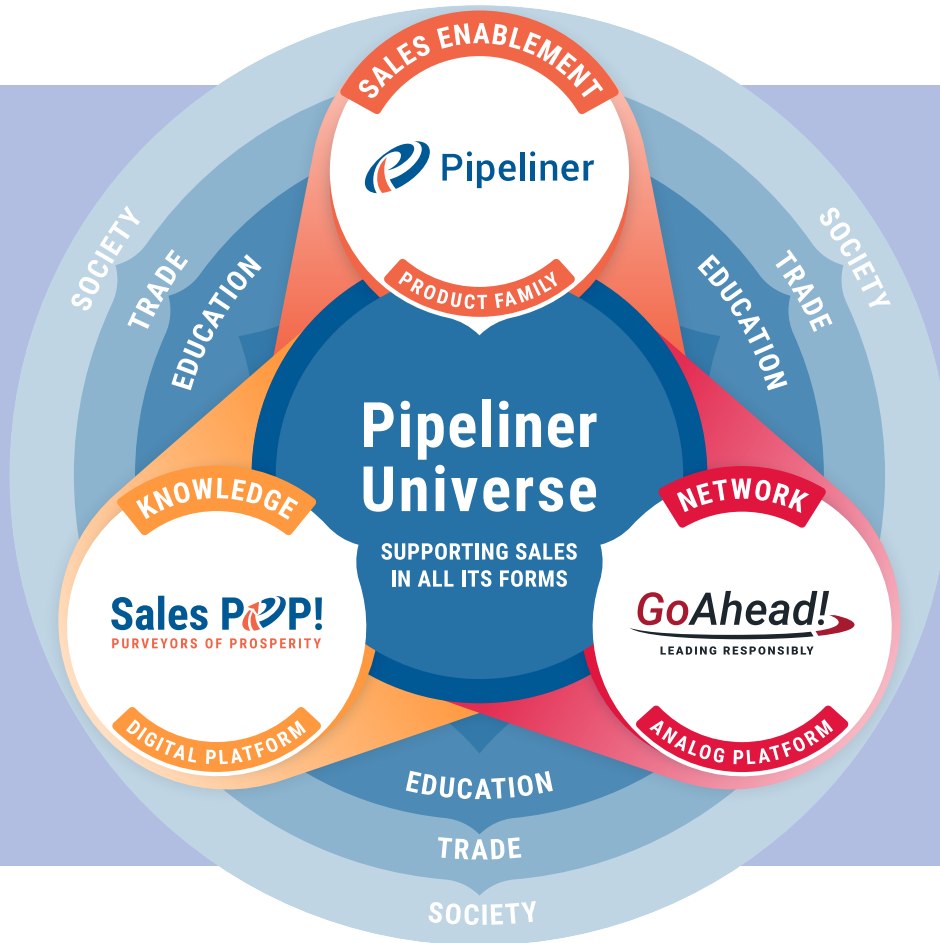
Pipeliner CRM

Pipeliner CRM is a technology platform built to enable Salespeople & Sales Managers to effectively & efficiently manage their pipeline and drive increased revenue. The combination of its intuitive interface and sophisticated backend, Pipeline CRM delivers *Instant Intelligence, Visualized* to give sales organizations a competitive edge.

Sales POP!

Sales POP! is a digital content platform that delivers the best in sales and sales-related content and thought leadership to readers across the globe. Its unrivalled and growing network of contributors brings different, unique perspectives and insights on today's sales & business issues. By leveraging multiple content formats from written, graphical, video & audio, Sales POP! appeals to the widest audience possible.

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Go Ahead! is an analog in-person networking platform where top speakers in cities across the globe deliver valuable, insightful talks to local audiences. These events serve as a way of keeping face-to-face networking alive and flourishing and provide a much needed alternative to the increasingly online and sometimes impersonal interaction that has become prevalent but not always preferable.
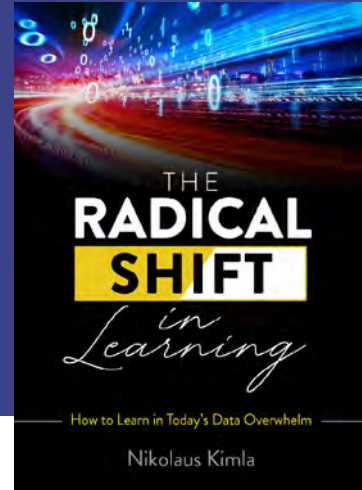
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Pacific Palisades
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ABOUT THE AUTHOR

NIKOLAUS KIMLA

A 30-year veteran of the computer industry, Nikolaus Kimla has founded and run several software companies. He and his company uptime iTechnology are the developers of World- Check, a risk intelligence platform eventually sold to Thomson Reuters for $530 million. He is the founder and CEO, developer and publisher of Pipeliner CRM, the first CRM application aimed squarely at actually empowering salespeople and sales management.

Also a prolific writer, Nikolaus has authored over 100 ebooks, articles and white papers addressing the subjects of sales management, leadership and sales itself.

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