

Robo Meister

# Partner Business Guide

A practical sales and operating guide for Robo Meister partners.

PARTNER BUSINESS GUIDE

DOCX + PDF offer draft

WHAT WE SELL

# 1. Positioning

## Not an app, but process execution

Robo Meister helps IT partners offer ready-to-use business process automation packages without building every application from scratch. Do not sell the whole ecosystem first. Start with a concrete client problem and one first workflow.

| Classic app                     | Robo Meister   |
|---------------------------------|--|
| Built around one form or screen | Built around process, responsibility and outcome                 |
| Changes go into the app         | Changes go into workflow, rule, document, integration or package |
| Client often thinks migration   | Starts with one workflow around existing systems                 |

COMMERCIAL PATHS

# 2. How partners earn

| Model           | Partner activity                      | Potential revenue                        |
|-----------------|---------------------------------------|--|
| Referral        | Refers client and problem             | Commission / revenue share               |
| Implementation  | Local support and pilot participation | Implementation and consulting services   |
| Store Partner   | Creates own packages                  | Package sales, pricing influence         |
| Developer / SDK | Apps, integrations, extensions        | Software projects, maintenance, packages |

ASSISTED ROLLOUT

# 3. How cooperation starts

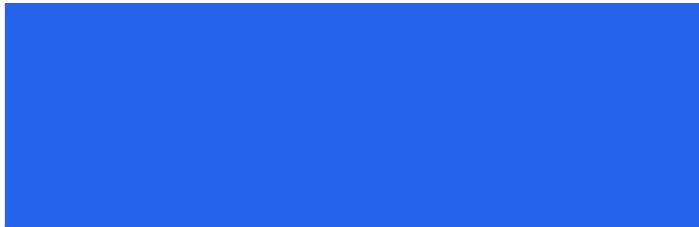
1. Select one client problem: workflow, owner, delay, documents, systems and expected outcome.
2. Run discovery/demo around this workflow, not the whole platform.
3. Define pilot scope: trigger, owners, exception path, documents and success metric.
4. Robo Meister runs initial configuration while partner learns the pattern and keeps the relationship.
5. After proving value, expand into more workflows, packages, Store or SDK.

OFFER TEMPLATE

# 4. Pilot: one workflow

| Element | Description  |
|---------|--|
| Goal    | Organize one process and show a measurable outcome.            |
| Scope   | One workflow, one user group, basic documents/statuses, simple |

|             |   |
|-------------|---|
|             | process demo.   |
| Outcome     | Visibility of stages, responsibilities, delays, exceptions and documents. |
| After pilot | Expansion, integration, next package or stop without a large migration.   |



PARTNER FIELD GUIDE

## 5. Diagnostic questions for the client

- Which process is delayed most often?
- Where do people need the most follow-up reminders?
- What still happens in spreadsheets, email or by phone?
- Where are documents, statuses and responsibilities fragmented?
- Do you have ERP/CRM but the process still happens outside it?
- Which one workflow would be a good pilot candidate?



SALES SCRIPT

## 6. Objection handling

| Objection                             | Answer  |
|---------------------------------------|---|
| We already have ERP                   | Good. Robo Meister can act as a workflow layer around processes that still live in emails, documents, approvals and exceptions. |
| This looks too big                    | That is why we start with one process, not the whole platform.  |
| Do we need to implement it ourselves? | Not at the beginning. Robo Meister can lead the first implementation.   |
| Do we need developers?                | Not for referral, sales and basic configuration. Developers are mainly needed for SDK/API work.                                 |



ROLES

## 7. Who does what

| Partner                   | Robo Meister                          |
|---------------------------|---------------------------------------|
| Finds client and problem  | Runs demo and discovery               |
| Keeps local relationship  | Provides technology and configuration |
| Can provide local support | Leads first implementation            |
| Can create packages       | Helps publish and sell in Store       |



SOLUTION MAP

## 8. Offer pages and links

| Page                  | Link  | Use                                  |
|-----------------------|---|--------------------------------------|
| QuickBooks comparison | <a href="https://robo-meister.com/compare/">https://robo-meister.com/compare/</a> | Accounting/finance clients comparing |

|                               |   |  |
|-------------------------------|---|--|
|                               | <a href="#">quickbooks</a>  | operational accounting workflows                               |
| ERP comparison                | <a href="https://robo-meister.com/compare/erp">https://robo-meister.com/compare/erp</a>   | Clients asking if this is an ERP replacement or workflow layer |
| Internal ERP comparison       | <a href="https://robo-meister.com/compare/erp/internal">https://robo-meister.com/compare/erp/internal</a>                                     | Clients with internal tools and fragmented processes           |
| Smart Clinic                  | <a href="https://robo-meister.com/solution/smart-clinic">https://robo-meister.com/solution/smart-clinic</a>                                   | Clinics: intake, visit prep, follow-up, documentation          |
| Accounting US                 | <a href="https://robo-meister.com/solution/accounting-us">https://robo-meister.com/solution/accounting-us</a>                                 | US accounting and bookkeeping workflows                        |
| Accounting US Office          | <a href="https://robo-meister.com/solution/accounting-us-office">https://robo-meister.com/solution/accounting-us-office</a>                   | Accounting offices serving multiple clients                    |
| Accounting PL                 | <a href="https://robo-meister.com/solution/accounting-pl">https://robo-meister.com/solution/accounting-pl</a>                                 | Polish accounting and document workflows                       |
| School Management             | <a href="https://robo-meister.com/solution/school-management">https://robo-meister.com/solution/school-management</a>                         | Schools and parent-facing administration                       |
| Finance Operations Automation | <a href="https://robo-meister.com/solution/finance-operations-automation">https://robo-meister.com/solution/finance-operations-automation</a> | AP approvals, spend control, exceptions                        |
| Port Management               | <a href="https://robo-meister.com/solution/port-management">https://robo-meister.com/solution/port-management</a>                             | Port/logistics operations and exception handling               |
| Accounting                    | <a href="https://robo-meister.com/solution/accounting">https://robo-meister.com/solution/accounting</a>                                       | General accounting automation narrative                        |
| Automation Application        | <a href="https://robo-meister.com/solution/automation-application">https://robo-meister.com/solution/automation-application</a>               | Clients who ask for a custom automation application            |
| Legal Office                  | <a href="https://robo-meister.com/solution/legal-office">https://robo-meister.com/solution/legal-office</a>                                   | Legal matters, evidence, documents, compliance                 |
| HR                            | <a href="https://robo-meister.com/solution/hr">https://robo-meister.com/solution/hr</a>   | Recruitment, onboarding, approvals, people operations          |
| Dropshipping                  | <a href="https://robo-meister.com/solution/dropshipping">https://robo-meister.com/solution/dropshipping</a>                                   | Store/order/accounting integration scenarios                   |
| Partner                       | <a href="https://robo-meister.com/solution/partner">https://robo-meister.com/solution/partner</a>   | Partner-facing explanation and cooperation                     |
| Developers                    | <a href="https://robo-meister.com/developers">https://robo-meister.com/developers</a>   | Software houses, SDK/API, custom packages                      |
| Logistics                     | <a href="https://robo-meister.com/solution/logistics">https://robo-meister.com/solution/logistics</a>   | Shipment exceptions, carrier handoff, delivery workflows       |
| Industry 4.0 Integrators      | <a href="https://robo-meister.com/solution/industry-4-integrators">https://robo-meister.com/solution/industry-4-integrators</a>               | Production, MES/WMS and integrator conversations               |
| Software House                | <a href="https://robo-meister.com/solution/software-house">https://robo-meister.com/solution/software-house</a>                               | Developer partner, package and integration building            |

CAPABILITY MAP

## 9. Robo Connector modules

| Module          | Use   |
|-----------------|---|
| CRM             | Client data, relations, funnels, sales and communication context  |
| BPM / Workflow  | Process templates, steps, roles, approvals and execution tracking |
| Project Manager | Projects, tasks, responsibility and delivery tracking             |

|                      |   |
|----------------------|---|
| Documents            | Templates, document hierarchy, evidence, approvals and contextual files |
| Legal                | Cases, regulations, obligations, document checks and risk escalation    |
| HR                   | Employees, recruitment, onboarding, time and people operations          |
| Finance & Accounting | Transactions, invoices, approvals, accounting workflows and reporting   |
| Store / Marketplace  | Products, services, offers, packages, orders and public-facing catalogs |
| SCM / Logistics      | Suppliers, deliveries, route planning, tracking and exceptions          |
| WMS                  | Warehouses, sections, stock locations and operational movement          |
| MES                  | Production execution, quality gates and manufacturing workflows         |
| Quality Assurance    | Tests, non-conformance, certificates and improvement actions            |
| Risk Manager         | Risks, opportunities, insurance, escalations and control actions        |
| Communication        | Messages, channels, chat, meetings and process-linked events            |
| Calendar / Booking   | Availability, meetings, scheduling, reminders and ICS flows             |
| Ticket Management    | Support requests, service work, issues and resolution workflow          |
| CMS / Websites       | Content, pages, templates and public-facing presentation                |