

Ver. 2025

***AUTOMATES* | Value Proposition**

Revolutionizing IT Managed
Services



REVOLUTIONIZING MANAGED IT SERVICES

AUTOMATES

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EXECUTIVE SUMMARY

INTRODUCTION

AUTOMATES: Your Trusted Cybersecurity & IT Growth Partner

AUTOMATES is a premier provider of advanced cybersecurity solutions, dedicated to protecting organizations from the ever-evolving threat landscape. Beyond safeguarding digital assets, we take a proactive approach to risk management, integrating industry-leading expertise with cutting-edge technology to provide comprehensive security solutions.

However, our commitment goes far beyond cybersecurity.

AUTOMATES is a true partner, invested in the long-term success of our clients. We foster a nurturing relationship built on trust, vision alignment, and shared growth. Our unique value lies in our ability to build scalable systems and processes that drive future expansion. From overseeing IT operations and managing expansion projects to supporting annual budget planning and aligning technology strategies, we act as an extension of your team—helping to shape and execute a sustainable IT roadmap.

Our vision for this partnership is to develop an independent, high-performing IT team that ensures seamless operations while preparing your organization for continued growth and innovation. With AUTOMATES by your side, you gain more than just a service provider—you gain a strategic ally committed to your success.

OUR MISSION STATEMENT

"Our mission is to deliver IT solutions with unwavering military-grade security and precision. We are dedicated to empowering our clients with robust, efficient, and future-proof IT infrastructures, ensuring their operations are secure, seamless, and resilient in the face of evolving challenges."

OUR CORE VALUES (BUILT ON T.R.U.S.T.)

Transformative: We embrace change and innovation, continuously evolving to meet the needs of our clients and drive positive transformation in our industry.

Responsive: We consistently deliver on our promises and commitments, earning the trust and confidence of our clients and partners.

Unity: We value unity and collaboration, recognizing that working together as a cohesive team builds trust and achieves greater results.

Service Excellence: We are dedicated to providing exceptional service, going above and beyond to exceed the expectations of our clients and stakeholders.

Transparency: We believe in openness and honesty in all our communications and interactions, fostering trust and accountability.

COMPANY INFORMATION

The AUTOMATES Story: A Decade of Growth & Innovation

*Founded in **January 2014**, AUTOMATES has been a cornerstone of **Southern California's technology landscape**. In **2019**, after our **first acquisition**, we rebranded as **AUTOMATES**, embracing a **new era of innovation and excellence**. Our **second acquisition in 2021**—a **telecommunications support firm**—expanded our expertise in **Internet and VoIP management**, solidifying our **comprehensive IT solutions**.*

*Over the past **decade**, AUTOMATES has grown into a **nationally recognized Managed Service Provider (MSP)**, earning industry recognition not only for **rapid expansion** but for our **unwavering commitment to core values built on T.R.U.S.T.** (Trailblazing, Responsive, Unity, Service Excellence, and Transparency).*

*Our partners choose AUTOMATES because we are more than just a service provider—we are **trusted advisors**, delivering **business-driven IT solutions** with a **proactive, future-focused approach**. We seamlessly manage **complex projects**, **support fast-scaling businesses**, and provide **high-touch service** without overwhelming our clients with unnecessary technical jargon.*

*What sets us apart is **our reputation**. With a **pristine 5-star rating**, our clients don't just **appreciate our work**—they **advocate for us**. Every day presents new challenges, and we embrace them with **passion, innovation, and an unwavering commitment to our partners' success**.*

ORIGIN STORY

We proudly invite you to read our full origin story here that is decades in the making:

https://AUTOMATES.com/files/2023/03/AUTOMATES_Final_MSP-Mag.pdf



KEY FEATURES AND DIFFERENTIATORS

Advanced AI-Driven Cybersecurity: Proactive Threat Detection & Response

At AUTOMATES, we leverage state-of-the-art AI-powered Managed Detection and Response (EDR) solutions to proactively identify, analyze, and neutralize cyber threats in real time. Our fully integrated security stack combines Treat Intelligence, Next Generation Antivirus, Security Operations Center (SOC), Threat Intelligence, Patch Management, and Intrusion Detection Systems (IDS), into a seamless single-pane solution.

SecurITy: AUTOMATES Quarterly Magazine

In 2023, we launched "SecurITy", AUTOMATES' quarterly publication, designed to keep our clients ahead of the curve. With over 500 subscribers, this magazine delivers expert insights, emerging technology trends, and critical cybersecurity updates, empowering businesses to stay informed and secure in an evolving digital landscape.



REVOLUTIONIZING MANAGED IT SERVICES

24/7 Help Desk & Security Operations

Our round-the-clock Security Operations Center (SOC), Network Operations Center (NOC), and Help Desk are staffed by expert engineers who proactively monitor, detect, and respond to threats and support requests in real-time—ensuring uninterrupted protection and service. With offices strategically located in San Diego and Tifton, GA, we provide seamless support across all time zones, keeping your business secure and operational 24/7/365.

Tailored & Scalable Solutions

We recognize that one-size-fits-all doesn't work in IT. Our solutions are custom-built to align with your organization's unique needs, ensuring seamless scalability and future growth. Through vision alignment and meticulous documentation, we help steer your technology strategy, standardize processes, and future-proof your IT infrastructure. Whether you're expanding or optimizing, our approach is designed to adapt and evolve with your business.

Veteran-Owned & Community-Driven

As a certified disabled-veteran owned business, AUTOMATES is deeply committed to giving back and supporting the communities we serve. We proudly sponsor FACES SoCal for the fifth consecutive year, actively contribute to the Urban Corps of San Diego, and are dedicated family members of the Silayan Filipina Organization. Our commitment extends beyond IT—we invest in people, education, and local initiatives, reinforcing our core values of service, integrity, and community impact.



Strategic Partnerships & Industry Leadership

As a nationally recognized Managed Service Provider (MSP), AUTOMATES leverages exclusive access to top industry leaders and cutting-edge resources. Our deep collaborations with leading technology and security providers ensure that our clients receive the most advanced, future-ready solutions available. Actively engaged in thought leadership, we work alongside CEOs, cybersecurity experts, and technology pioneers, shaping emerging technologies, best practices, and industry standards to drive innovation and excellence.



Certified Experts & Industry Veterans

Our team is composed of highly skilled, certified cybersecurity professionals with extensive real-world experience. Backed by industry-leading credentials, we bring a wealth of expertise in cyber defense, risk management, and IT security, ensuring that your organization is protected by the best minds in the industry.



AWARDS AND INDUSTRY RECOGNITION

AUTOMATES has been nationally recognized for its excellence in the MSP and cybersecurity space. We have been featured on the covers of "**MSP Success**" and "**MSP Cybersecurity**" magazines, highlighting our industry leadership. In 2023, we were named the **Top 5 Finalist** for the prestigious **TMT Better Your Best** award. Additionally, we earned the "**Genius of the Month**" title, standing out among **10,000+ competing MSPs** for our innovative approach and outstanding service delivery.

As we closed out 2024, AUTOMATES was honored as a **Top Finalist for the Titan of the Industry Award** in two prestigious categories: **WEST and VETERAN-OWNED**, solidifying an incredible year of growth and service excellence. Our momentum continued into 2025, earning us a spot on **CRN's MSP500 list** as a **Pioneer250 company** for the second consecutive year.

- 2025 CRN MSP500 (Top 500 MSP in North America)
- 2025 CRN ELITE250 (Top 250 MSP in North America)
- **2024 Titan of the Industry – WEST Finalist**
- **2024 Titan of the Industry – VETERAN-OWNED Finalist**
- 2024 MSP Cybersecurity Magazine Cover and Featured Article
- 2024 CRN MSP500 (Top 500 MSP in North America)
- 2024 CRN PIONEER250 (Top 250 MSP in North America)
- 2023 TMT Better Your Best Top 5 Finalist
- 2023 MSP Success Magazine Cover and Featured Story
- October 2023 Genius of the Month



OUR CORE SERVICES

1. Help Desk: Industry-Leading Support & Automation

At the core of our services is our award-winning AUTOMATES' NOC, providing 24/7 expert support through a highly skilled Service Delivery Team backed by best-in-class tools and industry-leading standards.

With decades of refinement, we've modernized our technology stack to ensure seamless, efficient IT management from a single pane of glass. Our approach integrates AI-driven workflows, direct tool alignment, and custom automation via our proprietary **AUTOMATES 365 solution**.

This allows us to proactively resolve issues, streamline operations, and deliver unmatched IT support—proven by our exceptional performance metrics:

INDUSTRY AVERAGE	THE AUTOMATES ADVANTAGE
Ticket Response Time: 1 Hour	Ticket response Time: <15 Minutes
Ticket Resolution Time: >14 Hours	Ticket Resolution Time: <2 Hours
Customer Retention Rate: 72% YoY	Customer Retention Rate: 99.1%
CSAT Score: 89%	CSAT Score: 98.6% (5-Star)

2. Cybersecurity: Comprehensive Protection & Proactive Defense

Our cybersecurity experts take a strategic, tailored approach to safeguarding your organization against ever-evolving threats. We begin with in-depth risk assessments and gap analyses to identify vulnerabilities, followed by a customized security roadmap designed to fortify your defenses.

Our **Account Managers** work relentlessly to implement **multi-layered security solutions**, ensuring continuous threat mitigation, compliance alignment, and proactive risk management. We leave no stone unturned, providing a robust cybersecurity framework that anticipates, detects, and neutralizes threats before they become liabilities.

3. Compliance & Regulatory Support: Simplifying Compliance, Securing Your Future

Staying compliant in today's evolving regulatory landscape is critical—and we make it effortless. Our compliance experts provide comprehensive auditing, reporting, and ongoing guidance to ensure your organization meets and maintains industry-specific standards with confidence.

We specialize in HIPAA, PHI, PCI DSS, GDPR, and CCPA compliance, delivering tailored strategies to mitigate risk, protect sensitive data, and streamline regulatory adherence. With AUTOMATES as your compliance partner, you can focus on business growth while we navigate the complexities of compliance for you.

OUR ONBOARDING PROCESS

Phase 1:

Comprehensive Service Assessment & Onboarding

Our engagement begins with a thorough evaluation of your current IT environment, including a detailed network risk assessment. This critical first step identifies vulnerabilities, inefficiencies, and areas for optimization, allowing us to develop a tailored solution roadmap that aligns with your business objectives.

As part of the onboarding process, AUTOMATES works hand-in-hand with your leadership team to streamline the transition and ensure business continuity. Our structured approach is designed to minimize downtime, optimize workflows, and position your organization for enhanced security, efficiency, and scalability from day one.

Phase 2:

Remote Monitoring & Management (RMM) Deployment

As part of our onboarding process, we begin by deploying our Remote Monitoring and Management (RMM) agents across all applicable assets. With the expert oversight of our Service Delivery Coordinator (SDC) and dedicated Technical Account Manager (TAM), we ensure full deployment and seamless integration.

Simultaneously, we initiate automated patch management and proactive support protocols to enhance system security and stability from day one. This process also allows us to identify potential life-cycle issues, detect failing hardware, and flag infrastructure components nearing end-of-life, enabling proactive resolution before they impact operations.

Security & Compliance

At this stage, we deploy our full-suite cybersecurity package, ensuring that every aspect of your security infrastructure is proactively managed. Phase 2 is designed for rapid execution, leveraging AI-driven threat detection and response from the moment our agents go live.

We begin by verifying the presence of existing antivirus solutions on all systems and immediately deploying our industry-leading Early Detection and Response (EDR) solution. This advanced security framework operates through an intelligent, AI-driven system that continuously learns and adapts to new threats, identifying vulnerabilities in real time.

Our EDR platform integrates seamlessly SOC and dashboard monitoring, allowing for centralized security management across your entire environment. With automated detection, rapid response capabilities, and 24/7 monitoring, we ensure that your network maintains a best-in-class cybersecurity posture, reducing risk exposure while meeting regulatory compliance standards such as HIPAA, PCI-DSS, and GDPR.

Phase 3:

Help Desk, Support & Ongoing Training

Upon receiving a fully completed intake form, all authorized staff members are immediately enrolled in our weekly tech tips program and customized anti-phishing campaigns to strengthen cybersecurity awareness. Additionally, we provide a comprehensive AUTOMATES user manual, ensuring your team has the necessary resources from day one.

From the very start of our partnership, AUTOMATES prioritizes staff training, equipping your team with the knowledge and tools needed to maximize the benefits of our services, enhance security posture, and improve operational efficiency. Our ongoing training ensures that your organization remains resilient and well-prepared against emerging cyber threats.

Documentation, Reporting, and Analytics

With our agents fully deployed, we unlock deep analytics and actionable insights that shape your technology roadmap and provide a scalable foundation for growth.

At AUTOMATES, we prioritize comprehensive documentation and transparent reporting, leveraging both Managed Detection and Response (MDR) and Remote Monitoring and Management (RMM) platforms. Our AI-driven analytics give us real-time visibility into your entire IT infrastructure, allowing us to proactively identify inefficiencies, security risks, and optimization opportunities.

Our customized reporting is tailored to your organization's specific needs, ensuring you receive data-driven insights to make informed technology decisions. Through AI-enhanced ticket triaging and workflow automation, we dramatically reduce resolution times, often resolving issues in a single click—tasks that would take traditional IT teams 45 minutes or longer.

This phase is where technology meets efficiency and precision, ensuring that your business operates at peak performance while maintaining security and compliance standards.

Account Management & Strategic Growth

At AUTOMATES, we prioritize proactive engagement with our partners, ensuring seamless alignment between technology strategy and business objectives. Our commitment to clear communication and vision alignment is why we are nationally recognized in the MSP industry. We believe in listening first, understanding your needs, and building trust through consistency and transparency.

Given the scale and significance of this account, we anticipate and welcome frequent interactions, including weekly, monthly, and quarterly business reviews to track progress, optimize solutions, and refine long-term strategies.

Project Oversight & Scalable Growth

One of our greatest value propositions is our ability to manage projects from inception to completion—regardless of complexity. With multiple partners, locations, branches, and agencies, our expertise in multi-site project execution is second to none.

We don't just manage technology; we architect it for scale, ensuring that your business is equipped with the right infrastructure, processes, and automation to grow efficiently. Through comprehensive design, meticulous data collection, and strategic foresight, we position your organization for long-term success in an ever-evolving digital landscape.

SCOPE OF SERVICES

END-USER SUPPORT

AUTOMATES delivers 24/7 remote Help Desk monitoring and alerting services with unlimited remote support included in every agreement. To ensure seamless after-hours assistance, we utilize a dedicated answering service to prioritize and triage support tickets, guaranteeing critical issues are addressed efficiently. Our standard support hours run from 9 AM to 6 PM, Monday through Friday, across all U.S. time zones, excluding weekends and recognized holidays.

Our Security Operations Center (SOC) services and Early Detection and Response (EDR) solutions operate continuously, providing round-the-clock monitoring and protection. Utilizing AI-driven threat intelligence, our SOC gathers real-time telemetry data, analyzing anomalies to detect and neutralize threats before they escalate. When a potential security incident is identified, our advanced solution can automatically isolate, contain, and eliminate the risk, ensuring your systems remain secure without manual intervention.

GOVERNANCE AND COMPLIANCE

At AUTOMATES, we take compliance seriously, ensuring that our clients meet the highest regulatory standards. Our team includes three fully certified HIPAA compliance officers, with our Service Delivery Coordinator and Documentation & Compliance Officer holding advanced certifications as HIPAA Business Associates and HIPAA Security Officers.

With extensive experience serving healthcare partners, we undergo continuous, rigorous training to maintain compliance and support annual audit requirements. Our compliance team is well-versed in both federal and local regulations, ensuring that every client's security and privacy measures align with evolving industry standards.

Beyond HIPAA, we conduct in-depth regulatory research tailored to our clients' industries and locations. For example, in San Diego County, we stay ahead of additional provisions protecting minors, such as SD County Article 14 and Code of Federal Regulations (CFR)-41. This proactive approach allows us to provide comprehensive, region-specific compliance support while safeguarding sensitive data.



INFRASTRUCTURE MANAGEMENT

At AUTOMATES, we take a holistic approach to IT infrastructure management, ensuring stability, security, and efficiency for our clients. As a leading Managed Service Provider (MSP), we strategically hire top industry experts to support a broad range of technologies, delivering scalable and future-ready IT solutions.

Our Business Disaster Recovery (BDR) strategies provide onsite and offsite backup solutions, customized to meet availability and compliance requirements. With a strong emphasis on Data Loss Prevention (DLP), our Endpoint Detection and Response (EDR) solution proactively safeguards sensitive data from breaches and cyber threats.

Cloud-to-Cloud (C2C) backups are a critical component of our strategy, ensuring seamless data protection for Microsoft and Google environments. Additionally, our Remote Monitoring and Management (RMM) platform supports automated patch management across our 3,500+ active agents, with rigorous pre-deployment testing to mitigate security risks.

In VoIP and Internet management, we collaborate with Vensearch, a nationwide leader in cost-effective telecommunications solutions. Whether optimizing your current VoIP provider or offering a fully managed solution, we prioritize cost reduction, seamless integration, and vendor collaboration to streamline operations and enhance communication reliability.

CONSULTING, vCIO, & STRATEGIC PLANNING

At AUTOMATES, our strategic planning and consulting services set us apart. As an AUTOMATES partner, you gain access to a dedicated leadership team committed to aligning technology with your business goals. Your team includes a Technical Account Manager (TAM), Customer Account Manager (CAM), Project Manager (PM), and a Service Desk Delivery Team, all working seamlessly to provide proactive guidance and support.

Our Service Delivery Coordinator (SDC) triages every request to ensure rapid response and resolution times while meeting Service Level Agreements (SLAs). Our current average response time is under 15 minutes, with average ticket resolution in 1 hour and 34 minutes. With over 30,000 tickets resolved annually, we maintain an best-in-class 98.6% 5-star customer satisfaction (CSAT) rating.

As an industry thought leader, we not only educate our clients but also actively train them in cybersecurity awareness. We deliver weekly security awareness emails and offer customized anti-phishing campaigns to strengthen defenses against evolving threats.

Your TAM and CAM work collaboratively to manage projects efficiently, backed by our Service Delivery Coordinator for seamless execution. AUTOMATES has successfully delivered projects across 22 states and 3 countries, ensuring scalable, standardized, and future-proofed solutions that lower Total Cost of Ownership (TCO).

We go beyond technology implementation—we schedule Technology Business Reviews (TBRs) to maintain continuous engagement with your leadership team. Our vCIO services provide strategic IT planning, budget forecasting, and long-term roadmaps, ensuring that your technology infrastructure evolves alongside your business growth.

At AUTOMATES, ***we don't just provide IT support, we serve as your trusted technology advisor***, dedicated to your long-term success, efficiency, and security.

OUR PROMISE

Our Promise to You

At AUTOMATES, we are committed to continuous improvement, innovation, and delivering unparalleled service to our partners. Our promise is built on three core pillars:

1. Relentless Growth & Stack Development

Your business never stands still, and neither do we. As we rapidly scale our workforce and capabilities, our unwavering focus is on enhancing our technology stack to ensure you receive cutting-edge solutions that drive efficiency, security, and scalability. We are not just participants in the MSP space—we are thought leaders shaping the future of our industry. Our team undergoes rigorous training and certification to guarantee that every interaction with your organization is backed by expertise, precision, and excellence.

2. Exclusive Industry Influence & Partnerships

As a nationally recognized MSP and a Top 5 TMT Better Your Best Finalist, our voice carries weight in the industry. We have direct access to the leadership teams of top-tier solution providers, allowing us to shape the evolution of technology in ways that benefit our clients first. In some cases, we have even co-developed product enhancements alongside vendors to ensure your organization remains ahead of the curve.

3. Commitment to Excellence & Service

We don't just serve—we partner. Our success is built on earning trust, delivering results, and continuously pushing the boundaries of what an MSP can provide. Our dedication to education, process improvement, and customer experience is unwavering.

When you partner with **AUTOMATES**, *you are not just choosing an IT provider, you are choosing a dedicated ally in your journey toward growth, security, and success.*

CLIENT CASE STUDIES

CLIENT 1

Name: **Aesthetic Partners (DermaCare Brand)**

Industry: Health industry, Private Equity (PE) Website: <https://www.dermacaresandiego.com/>

Full Case Study Article: <https://AUTOMATES.com/2024/01/19/trust-the-experts-you-wouldnt-do-your-own-botox-at-home-just-like-dr-jeff-birchall-doesnt-do-it-for-his-medical-practice-he-goes-to-the-experts-at-AUTOMATES-instead/>

Press Release: *AUTOMATES* SecurITy Quarterly Magazine – 3rd Edition Seat Count: 70+ (Total Number Undisclosed)

Location/Practice Count: 5 (in rapid growth mode with PM and modeling)

Reference #1: Nikki Mallett, California Regional Manager, nikki@dermacaresandiego.com

Reference #2: Chelsea Brown, Director of operations, chelsea@feelsynergy.com

AUTOMATES categorizes Aesthetic Partners (AP) as a Private Equity (PE) firm specializing in the healthcare services sector. As AP experiences unprecedented and rapid expansion, *AUTOMATES* assumes comprehensive responsibility for managing various aspects of their operations. This includes cybersecurity, HIPAA compliance, infrastructure management, project management, modeling for rapid growth, surveillance systems, audio/video solutions, email services, cloud services, and onboarding.

CLIENT 2

Name: **Farmers (Kirk Miller Insurance Agency)**: Largest Farmers agency in the nation

Industry: Insurance Industry

Website: <https://kirkmillerinsurance.com/>

Full Case Study Article: <https://AUTOMATES.com/2023/07/19/kirk-miller-insurance-agency-grows-with-AUTOMATES>

Press release: *AUTOMATES* SecurITy Quarterly Magazine – 1st Edition Seat Count: 26

Location/Agency Count: Currently 23 active agencies under management Reference #1: Kirk Miller, Agent, kirk@kirkmillerinsurance.com

Reference #2: Melissa Tanaka, Office Manager, melissa@kirkmillerinsurance.com

We hold great admiration for the remarkable accomplishments of Kirk Miller and his dedicated Agency team. With a portfolio encompassing over 30 Farmers agencies, Kirk and his team have successfully ascended to become the top-ranked Farmers Agency in the entire nation. We encourage you to thoroughly review the comprehensive case study provided above for an in-depth exploration of their remarkable journey and achievements.

CLIENT 3

Name: **Mortgage One, Inc.**

Industry: Mortgage Lending

Website: <https://www.mortgageonehomeloans.com/>

Full Case Study Article: <https://AUTOMATES.com/files/2023/10/bryces-story.pdf> Press Release: AUTOMATES SecurITy Quarterly Magazine – 2nd Edition

Seat Count: 196+ (Rapid Growth)

Location/Branch Count: 7 (currently in rapid growth mode) Reference #1 – Bryce Schetselaar, CEO, bryce@gomortgageone.com

Reference #2 – Tammie Young, Operations Manager, tyoung@gomortgageone.com

AUTOMATES takes great pride in its partnership with Mortgage One and the remarkable journey of their CEO, Bryce Schetselaar. From its humble beginnings operating out of a garage, Mortgage One has surged to the impressive ranking of #284 on the Inc. 5000 list. At AUTOMATES, we've assembled a dedicated team to cater to Mortgage One, guaranteeing unwavering compliance with all regulatory requirements. We leverage our comprehensive cybersecurity stack to bolster their overall cybersecurity posture. For a detailed account of this success story, we invite you to review the comprehensive case study provided above.

CLIENT 4

Name: **Doyle Schafer McMahon**

Industry: Legal

Website: <https://dsmlp.com/> Seat Count: 73

Location: 1

Press release: *AUTOMATES* SecurITy Quarterly Magazine – 3rd Edition Reference: JJ Tucker, Firm Manager, jtucker@dsmllp.com

Doyle Schafer and McMahon (DSM) hold a special place among our cherished partners. While we hesitated to include them as a reference, given the potential for bias, our relationship with DSM exemplifies the depth of engagement and commitment to customer experience that we aim to achieve with all our partners. The DSM team is exceptionally brilliant, with precise infrastructure and design. They exhibit a genuine dedication to cybersecurity, embodying the standard that all small and medium-sized businesses should aspire to. For these reasons, I couldn't complete this proposal without acknowledging the exceptional contributions of their firm.

Kirk Miller Insurance Agency Grows With Automates

Posted by Automates on Jan 10, 2022

[Like](#) [Share](#) [Comment](#)

Kirk Miller Insurance Agency is currently the largest commercial insurance agency in the nation for Farmers Insurance. As an all-lines agency, we underwrite everything from home insurance to auto insurance to commercial, HOA, and life insurance. We have been in business since 2006 and have expanded to a team of almost 25 people.

Due to industry requirements, we must abide by an immense number of rules and regulations. In order to protect our client's most sensitive data, it is imperative that we have cutting-edge systems in place and that we use the full power of information technology. This becomes even more important with those in our office that work remotely.

Automates came to us as a referral from an associated agency eight years ago. We're proud to say we were one of the first ones to work with them. When we started working together, Tommy Thornton and his team made quick work of learning the ins and outs of our industry, how to link all of our systems, and how to set up our information technology so that it flows with the systems already in place.

At the beginning of our relationship with Automates, we were only experiencing some minor computer and network issues. However, as our agency expanded over the years, we began experiencing more and more IT-related problems, and we really needed their help. They've always been there, and when we nearly tripped in size, Automates grew with us.

Especially with all the cybersecurity threats going on now, it's nice to have someone who's monitoring all our systems so we don't have to think about it. If something goes wrong, Automates is there to take care of it for us. In a crisis situation, we sit back and let the experts handle it. By working with Automates, we've been able to lock our system down and make sure that security concerns don't compromise our clients' data.

Automates has taken so much off our plate. We have the luxury of relying on them instead of trying to figure things out ourselves, and it's been a huge relief.

On top of that, we've established so much trust that we can just leave our computers on and they can remote in while we're in a meeting, saving us a substantial amount of time that we can then use to better serve our clients.

To other growing business owners in the insurance industry and beyond, we highly recommend you start hiring to your weaknesses. For most business owners, IT is a weakness. Hire it out to a professional like Automates and feel the same relief that we do. Doing so also transfers risk, which, as an insurance agency, we know the importance of. Allow yourself to let go and focus on what you're best at in your business.



Kirk Miller
Insurance Agency Inc.

CLIENT SPOTLIGHT

"THEY'VE BEEN A TOTAL GAME-CHANGER"

How Tommy Thornton Of Automates Has Helped Bryce Schetselaar And His Team At MortgageOne Expand Their Organization Through Robust Technology Solutions

MORTGAGEONE

Company Name: MortgageOne
Name & Title: Bryce Schetselaar, President
Location: Oakland, CA (HQ - mobile location)
Website: MortgageOne.com
Industry: Mortgage Broker

IS THIS YOU? SERVICES WHY CHOOSE US? ABOUT US LOCATIONS CONTACT US

AUTOMATES

Blog

Trust the Experts: You Wouldn't Do Your Own Botox At Home Just Like Dr. Jeff Birchall Doesn't Do IT For His Medical Practice—He Goes To The Experts At Automates Instead

Tommy Thornton, CEO of Automates

Up fillers, Botox, chemical peels, red light therapy. Even just 10 years ago, non-invasive, aesthetic medical procedures were for the ultra-wealthy. The out-of-pocket costs made them difficult to access, but in recent years, they've become commonplace across the globe. In 2022, the medical aesthetics market was worth \$15.3 billion, but that number is expected to grow by 14.7% annually between now and 2032. In the industry for decades, Dr. Jeff Birchall has seen the industry change, not only from his customer's point of view but also with regard to medical capabilities and technology.

"When I started in medicine 30 years ago, it was all paper charts and a regular phone system. Then we started using Electronic Medical Records (EMRs) on servers in the office. Now everything is cloud-based," Dr. Birchall explained. These changes in technology impacted his focus as a medical practitioner, but since starting his own practice, Dermacare, in 2008, they've caused even more change.

Customer privacy, HIPAA requirements, credit card information, staff communication, and even medical service levels depend on a fully operational IT infrastructure. Years ago, before the level of tech dependence today, Dr. Birchall forged a partnership with Automates, a managed IT service provider that helps run the IT side of things so he can focus on patient care. "Let the lawyer make the contracts, let your accountant do your taxes, and let your IT person do your IT. I do the same thing. If you want your face to look good, come to me. I know how to do Botox. Don't try to do it yourself!"

Jeff Birchall, MD

CONCLUSION

Dear Reader,

At AUTOMATES, we are ready to deliver a comprehensive, tailored managed IT services solution designed to meet and exceed your unique business needs. Our commitment to excellence, industry expertise, and proven track record of success make us the ideal partner to elevate your IT infrastructure into a strategic asset that drives growth and innovation.

We recognize that in today's fast-paced business environment, agility, security, and efficiency are non-negotiable. That's why we have invested heavily in cutting-edge technology, proactive cybersecurity measures, and a team of highly skilled professionals who are passionate about optimizing IT for business success.

But we don't just provide IT services—we build lasting partnerships. Like our collaborations with Doyle Schafer McMahon and Mortgage One, we take a deeply invested approach in understanding your vision and ensuring that your technology aligns with your long-term goals. Choosing AUTOMATES means more than hiring an MSP—it means gaining a dedicated strategic partner who is invested in your success. We appreciate the opportunity to support your organization and look forward to the possibility of working together to build a resilient, future-ready IT foundation.

Welcome to *AUTOMATES*!

Tommy Thornton
AUTOMATES, CEO
tommy@AUTOMATES.com

A stylized, handwritten signature in black ink, likely belonging to Tommy Thornton, the CEO of AUTOMATES. The signature is fluid and cursive, with a prominent 'T' and 'H'.