



Productizing the “Service” in “Product with a Service”

Adding services to a product - whether your own or that of another company creates opportunity for increased revenue - but also increased costs and human power. Service is a powerful lever to improve the experience of a client when selling a product, but can drive up costs and time investment of every sale. This is why it is important when building a service arm of your business to find ways to “productize” the service offerings.

A winemaker came to [Grow With Jen](#) with a need to improve some of their operations for the service arm of their winemaking business. One particular piece of their project was to create efficiencies around their corporate gifting program. Their value proposition was that in addition to providing carefully crafted wines they produced to their corporate clients for gifting, they would also create landing pages for the corporate gifting client to send to their recipients, as well as handling the logistics of capturing the selections for their recipients as well as their shipping information.

Their current method was to create a new website page - manually using a template - for each of their corporate gifting clients, manually add the selections that the client wanted to offer their recipients, and then copy the orders that came through the website into a CSV format that was then used to fulfill orders.

In addition to spending time with their client to curate the gifting experience, there was a lot of technical time spent creating new website pages, adding particular messaging and logos, and then also ensuring recipient information was communicated to fulfillment. While the value of selling more wines via corporate clients who already appreciated their work and wanted to share was enticing, the human-power needed to provide that service was becoming taxing as they scaled their gifting program.

The Need

The winemaker needed ways to automate the onboarding of new corporate gifting clients - capturing their details to get their personalized gifting program set up, then the

ability to create landing pages with the proper selections, messaging, and logos effortlessly. They also needed to provide customized links to clients automatically, and send new recipient orders to clients as well as shipping updates to recipients.

The Architecture

We utilized the following SaaS (Software as a Service) tools to achieve productization:

- **Airtable** - This became our hub for information. Airtable captured new corporate gifting client details, as well as orders, and then formatted the orders to send to fulfillment in the format needed (csv). We were able to make their “dashboard” in one place, meaning they didn’t leave Airtable to customize the landing pages, send finalized pages to clients, and also update shipping and order status to recipients. We also sent emails from Airtable automations to clients.
- **Jotform** - We used Jotform as “smart” landing pages for corporate gifters to send to their recipients. These smart forms only showed the selections the gifter wanted to offer recipients - the winemaker offered multiple tiers of wines, and the gifter could select the number of bottles they wanted to send from each tier. Since there were three tiers and up to six bottles, that meant there were 18 possible options in the Jotform to conditionally show based on the gifter’s selection. We were also able to send a private message that was written into Airtable into the form along with the logo, so it was completely personalized. We also used Jotform to register new gifting clients and capture their billing information.
- **Integromat** - We used Integromat to “glue” the different pieces together, sending new corporate gifters to their mailing platform - Active Campaign, send the finalized links to bit.ly for shortening, and updating tags in Active Campaign to advance recipients through the customer journey as their wines were shipped.
- **Active Campaign** - Through automations, we were able to advance corporate clients through the sales process and recipients through the customer journey of receiving their wines.

Functionalities Utilized

- **Airtable Design** - Through carefully structuring their Airtable base, clients were linked to their orders, so share views could give them real time updates of what recipients had ordered through their links. Fulfillment needed the data from both the

gifter and recipient in a specific order on a CSV file, so the base was designed to show open orders needing to be sent in a view, so all the team had to do was download the list at the right frequency and change the status of the order once sent to fulfillment.

- **Airtable Automations** - New order receipts were sent as orders came in to the gifters. This was completely automated. We also sent customized landing page links upon status change in Airtable. New orders were also automatically linked to the clients, as the client ID was prefilled in the Jotform when sent to recipients.
- **Airtable Scripting** - Using a script to trigger a webhook in Integromat, we were able to pull new shortened urls into [Bit.ly](#) and return them to Airtable.
- **Jotform Prefills** - Jotform features include being able to prefill data into a form via link, so we were able to encode the message from the client, and use conditional logic to show the correct number and order of selections to the recipient. These were long urls, so we utilized scripting to create more compact urls for the clients to send to their recipients. A single select in Airtable with coding for the 18 possible selections was sent to the prefilled form in a drop down that matched the conditional logic, so there was no need to personalize individual landing pages at all. It was completely driven from the data in Airtable.
- **Jotform Conditional Logic** - By having hidden fields and data in Jotform, we were able to show the correct options from the 18 possible selections, confirm that the address the wine was being sent to was in a state where wine could be shipped - and stop the order if not, and also capture alternate shipping dates if the recipient wouldn't be home in the window specified by logic (distance from fulfillment).
- **Integromat** - New clients and recipients were added to Active Campaign, and the subscriber ID was added back to Airtable to ensure that when the recipient needed updates on their shipment, their tags were updated in Active Campaign. The team updated the shipping status of the orders and it triggered Integromat to update that subscriber ID in Active Campaign.

Outcomes

Because we were able to automate onboarding and landing page creation, the winemaker's marketing team could focus on connecting with more potential corporate

gifting clients, and helping them through the sales process of wine selection. The software took out the human-power of needing to set up each individual landing page.

This helps the product with a service offering scale, as it takes much less time to onboard a new gifting client, and they are no longer limited to spending an hour or more customizing each page. They are also able to better communicate orders to fulfillment, as they aren't copying both parties' information into their fulfillment form, it is generated automatically with each submission of the corporate gifter's landing page by a recipient.

Because we were also using Airtable for their Client Relationship Management, we also added new corporate gifters to their CRM base, again removing the need to copy and paste information from one place to another.

By thinking through the gifting process, we were able to help the winemaker create a completely customized experience for their clients while still reducing the "customization" piece to just filling in data in Airtable.

About Grow With Jen, Inc.

Jen Rudd, MBA, PMP is a Business Consultant specializing in helping businesses scale and reduce human-power while leveraging automation. She also a SaaS development expert with extensive background in creating systems and automation for a variety of business sectors. She had over a decade of corporate experience, before leveraging that over the last ten years as a consultant. Her MBA is from the University of Illinois at Urbana-Champaign and was focused on Entrepreneurship and Business Analytics. A graduate of Whittier College, she worked in the Wholesale, Luxury Sales, Office Management, Construction, Construction Accounting, Corporate Accounting, and Manufacturing Fabrication fields before starting her business in 2011. In addition to her education and experience, she is a Certified Project Management Professional.

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