Innovate, Automate, Dominate:
A Strategic Approach to Ai in Sales and Marketing

Suzie Glenn, MBA

Founder and CEO / Wellify Consulting
SUZIECONSULTING@GMAIL.COM

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I have been told I am an ANOMALY…

Dictionary
Definitions from Oxford Languages · Learn more

a·nom·a·ly
/əˈnämələ/

noun

also, see Suzie Glenn

1. something that <u>deviates</u> from what is standard, normal, or expected.
   "there are a number of anomalies in the present system"

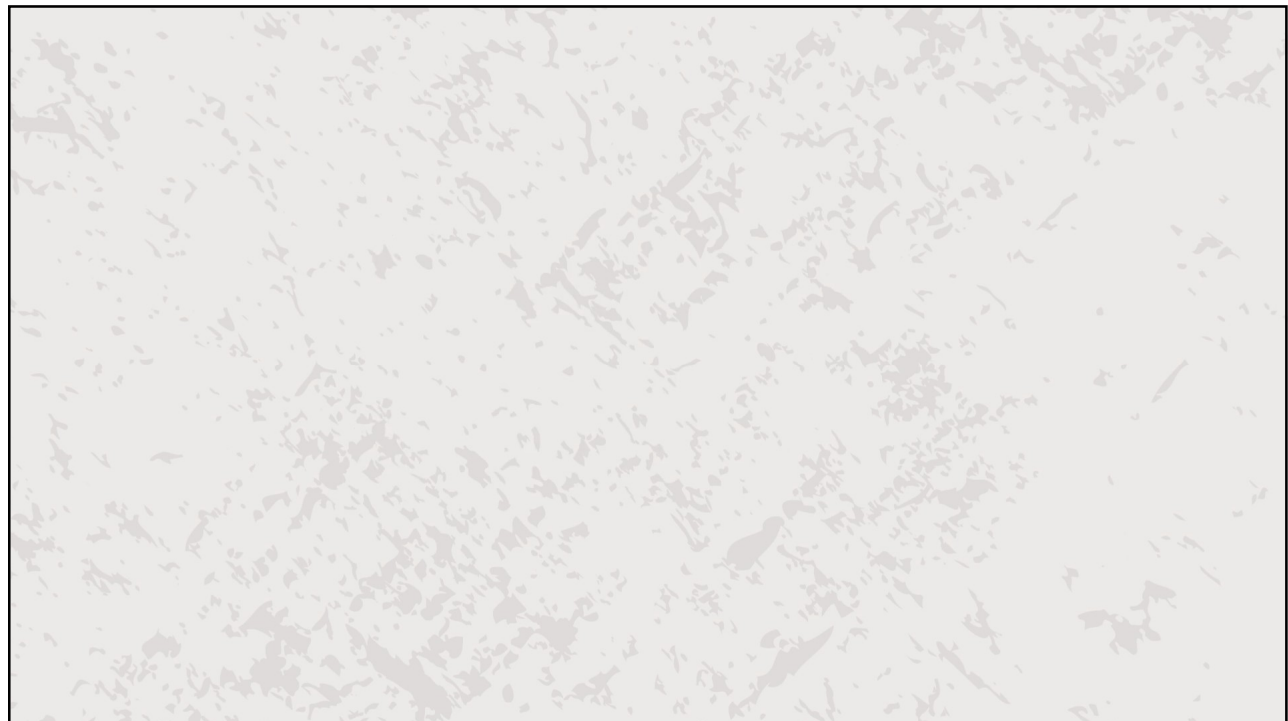Similar: oddity   peculiarity   abnormality   irregularity   inconsistency ⌄

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What I am NOT:

- Pharmacist
- Pharmacy Owner
- Technician

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Why Asked to Speak:

SUZIE'S CV

- 20 years Med Sales/Leadership
- 9 years compounding CEO/ Director of Provider Ed
- Utilized Disruptive Innovation in UVP
- Grew from a few vet Rx to MM $ Regional Player
- CAGR 69% (nonsterile, no GLP1/GIP)
- Crafted Digital Strategy
- Wellify Consulting (INNOVATE, AUTOMATE, DOMINATE)
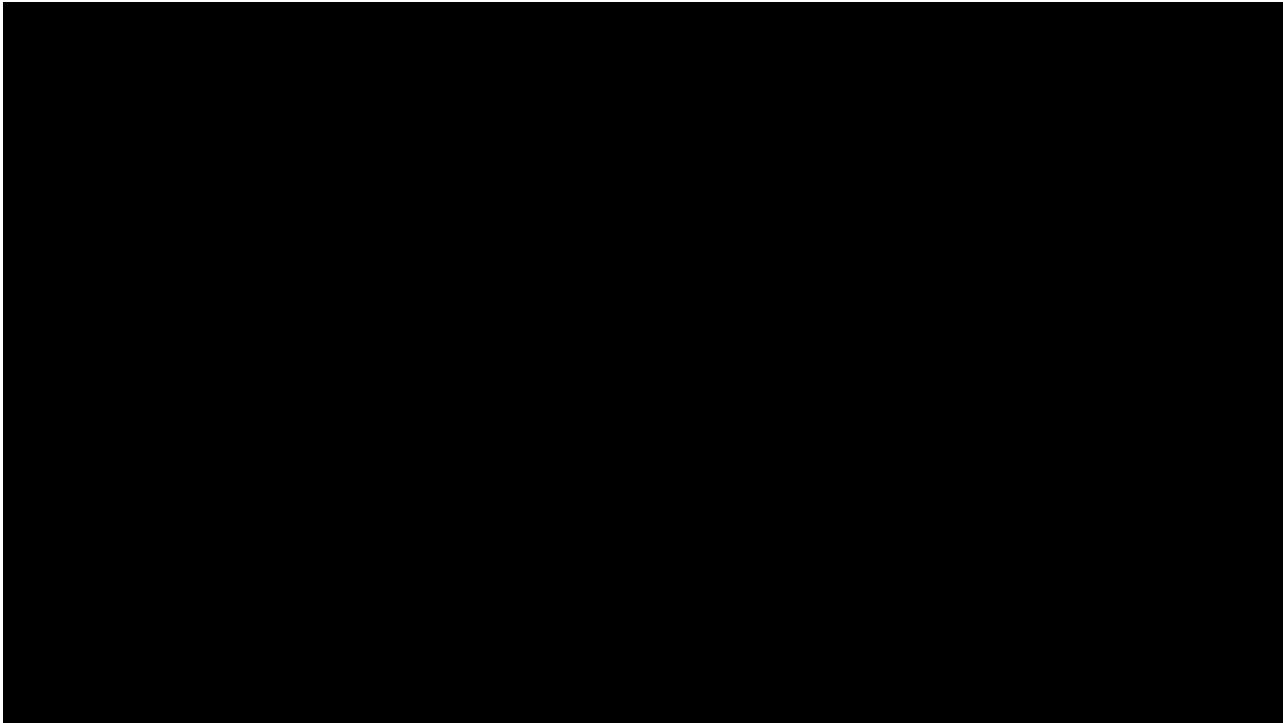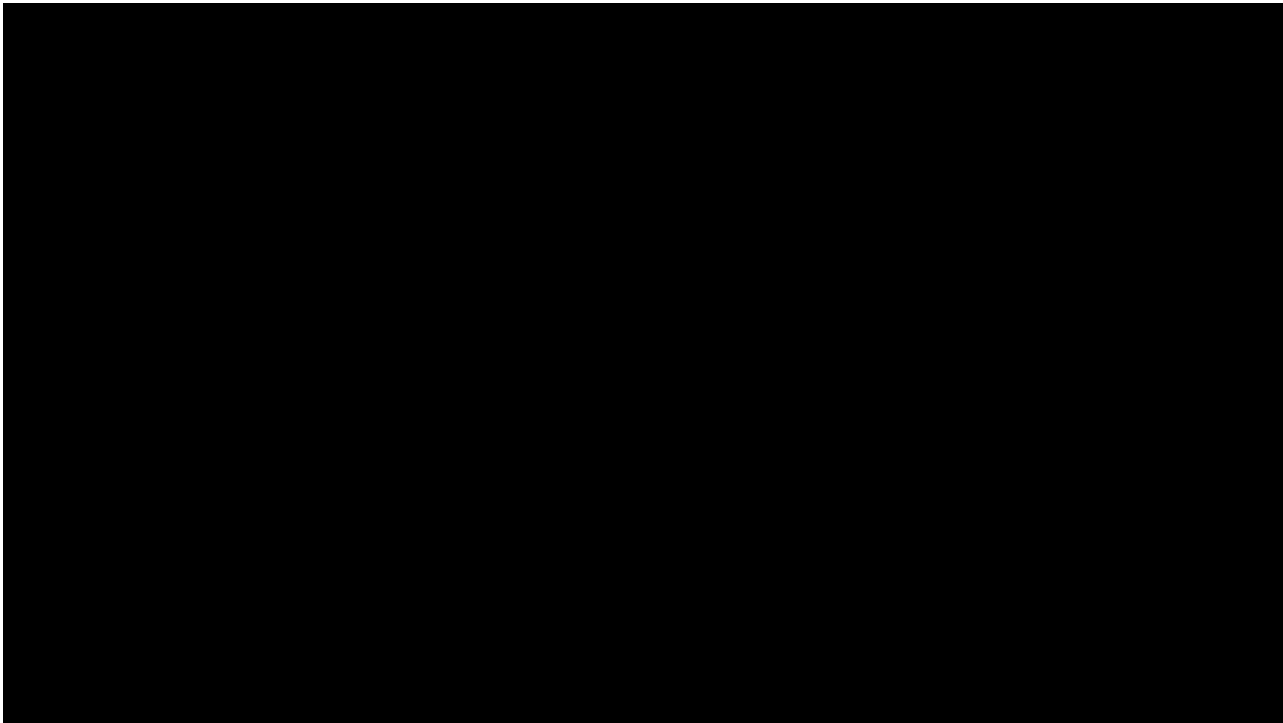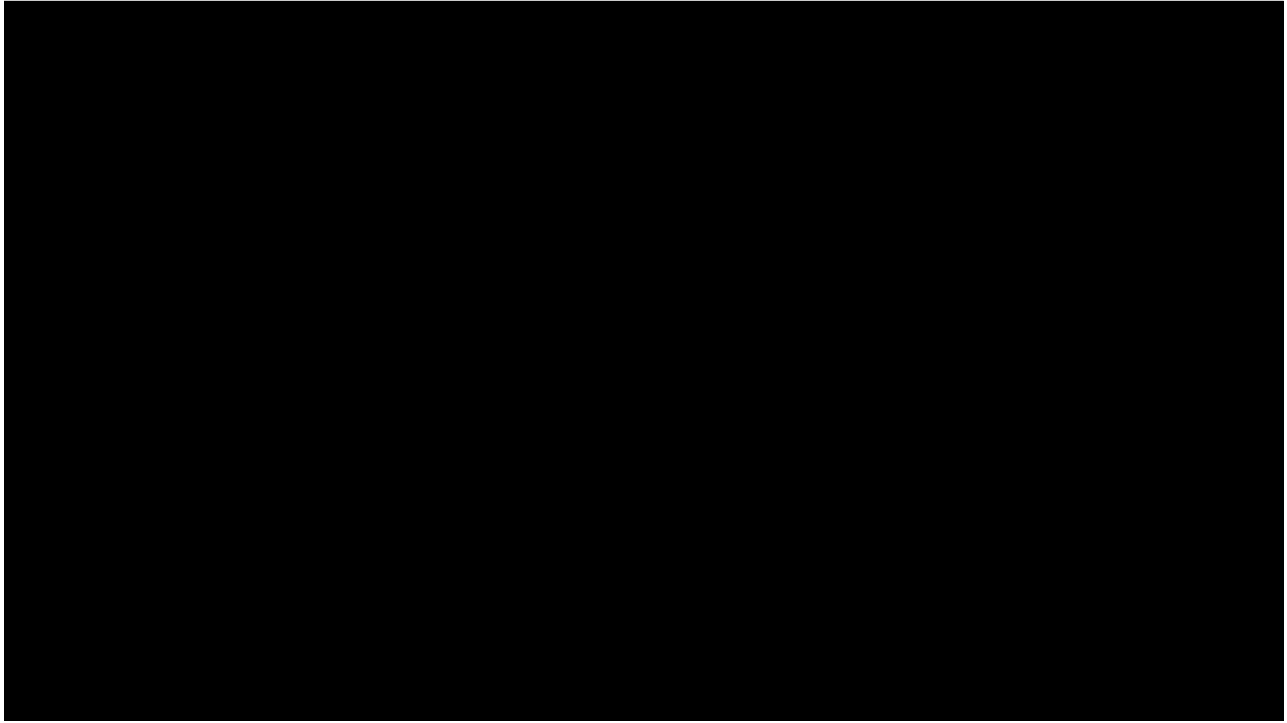- Unique Perspective: No Owner/Operator…I made it happen

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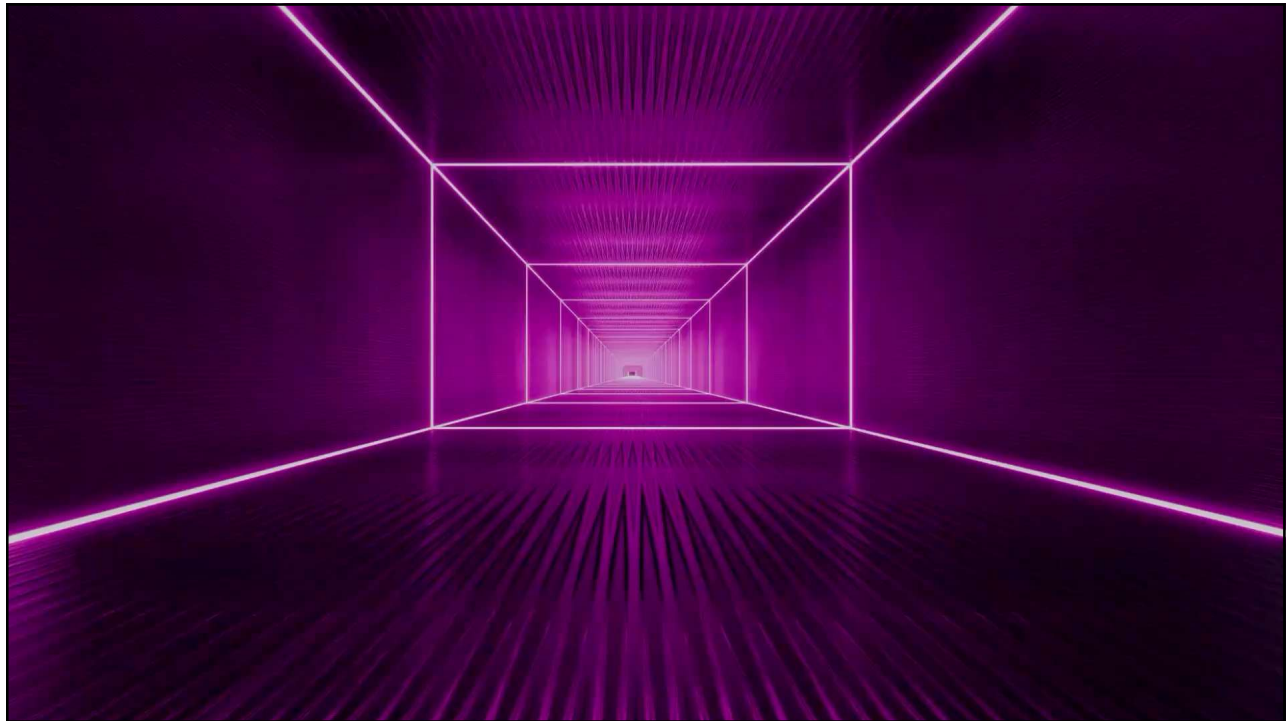
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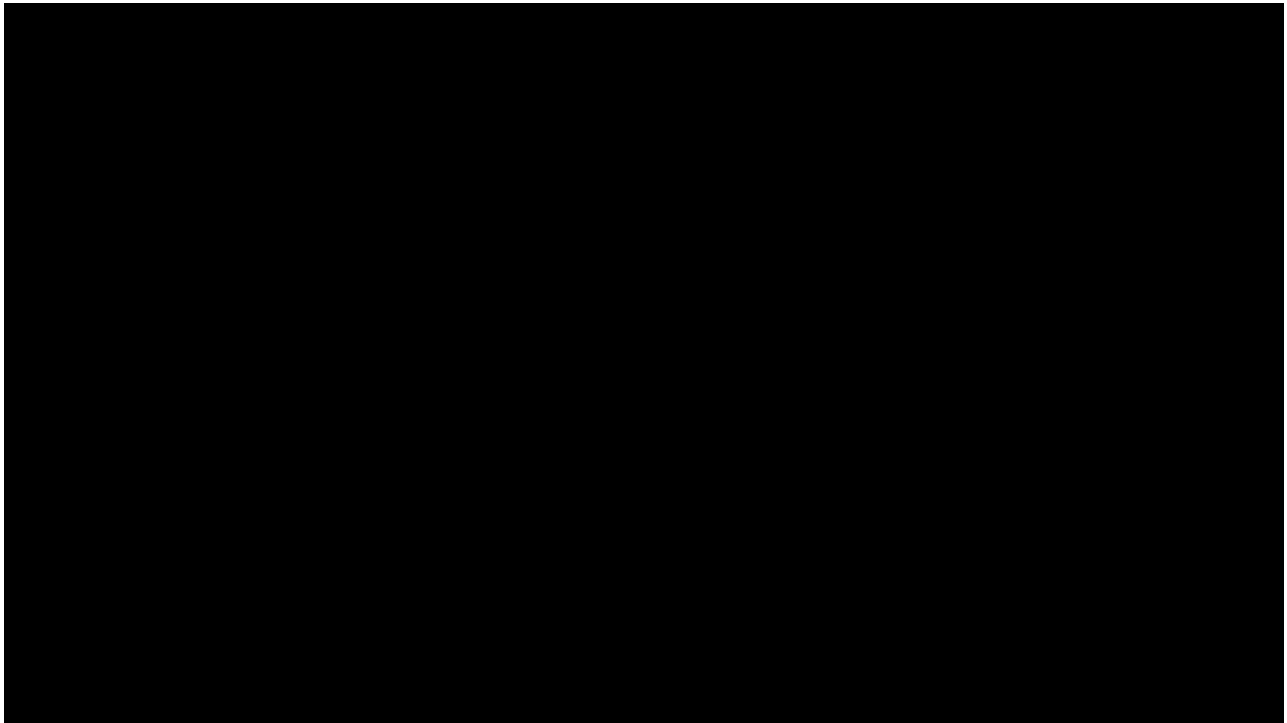
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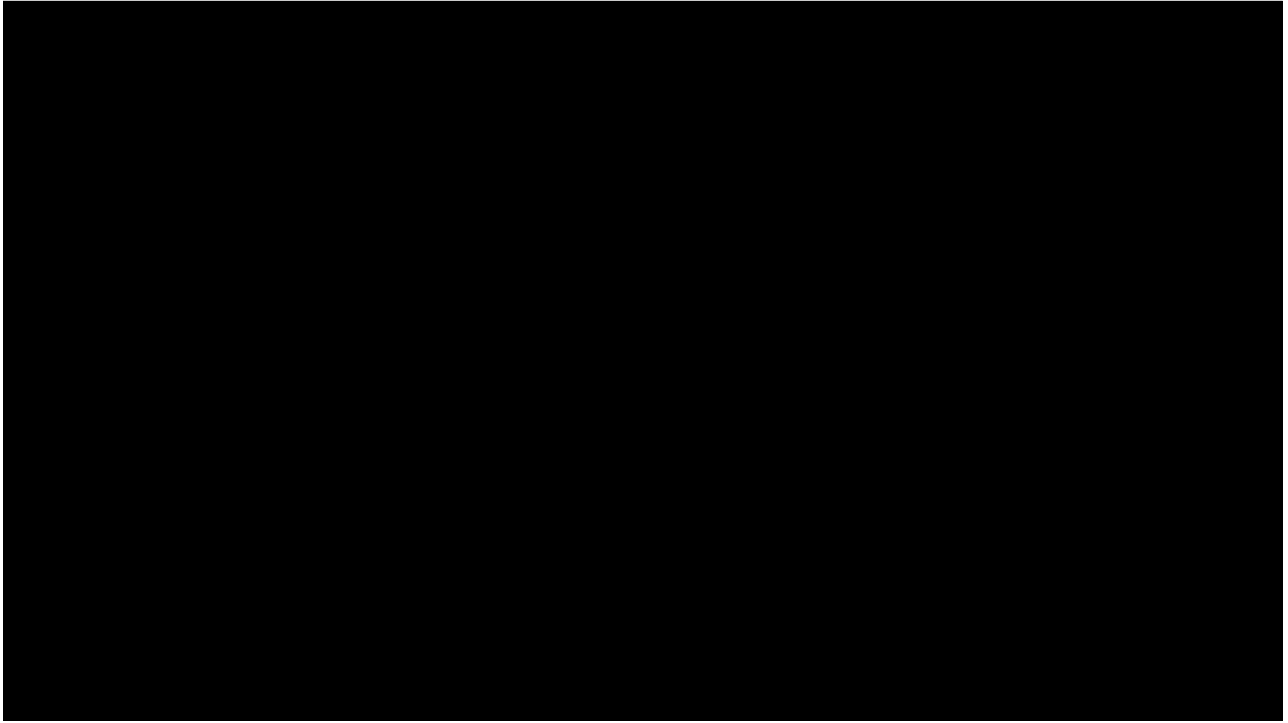
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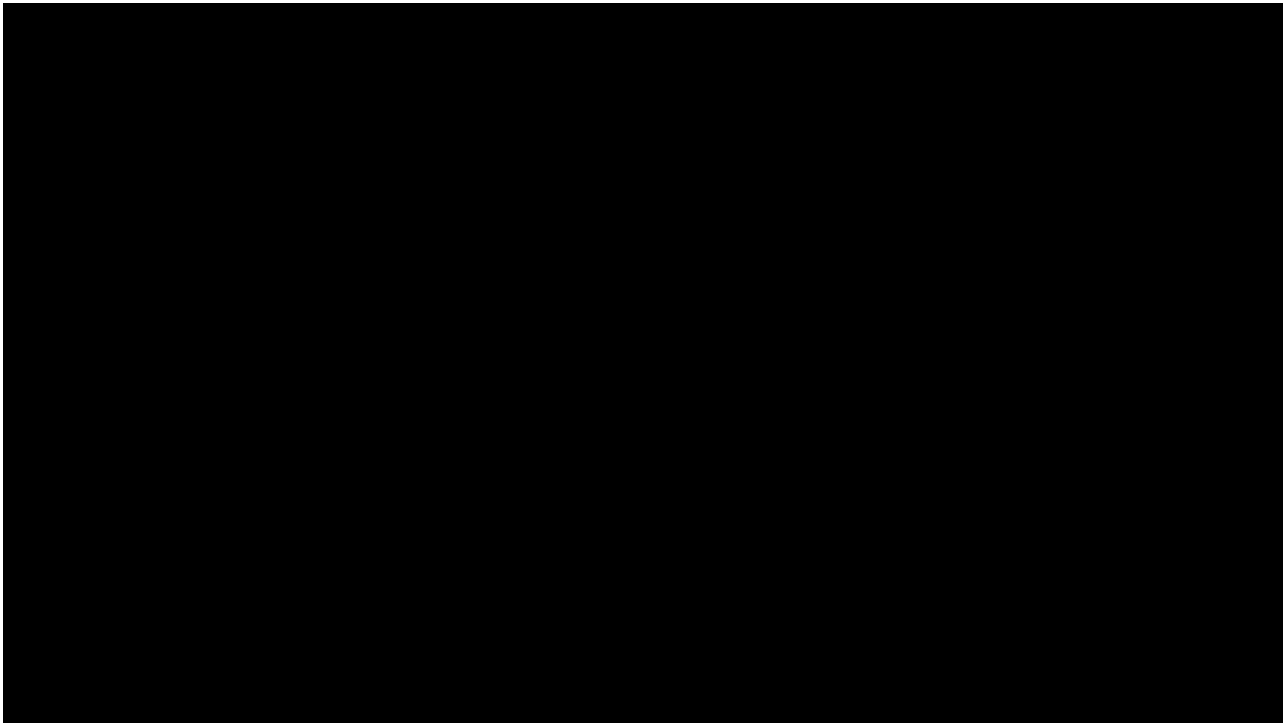
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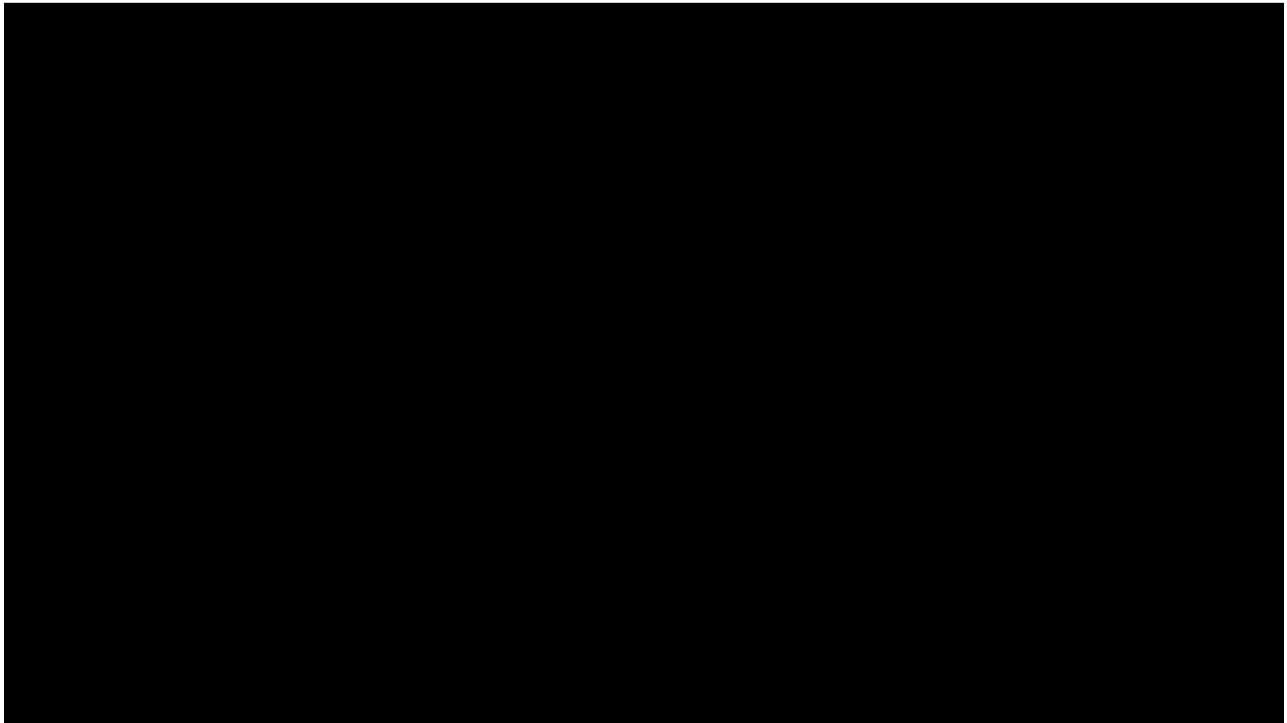
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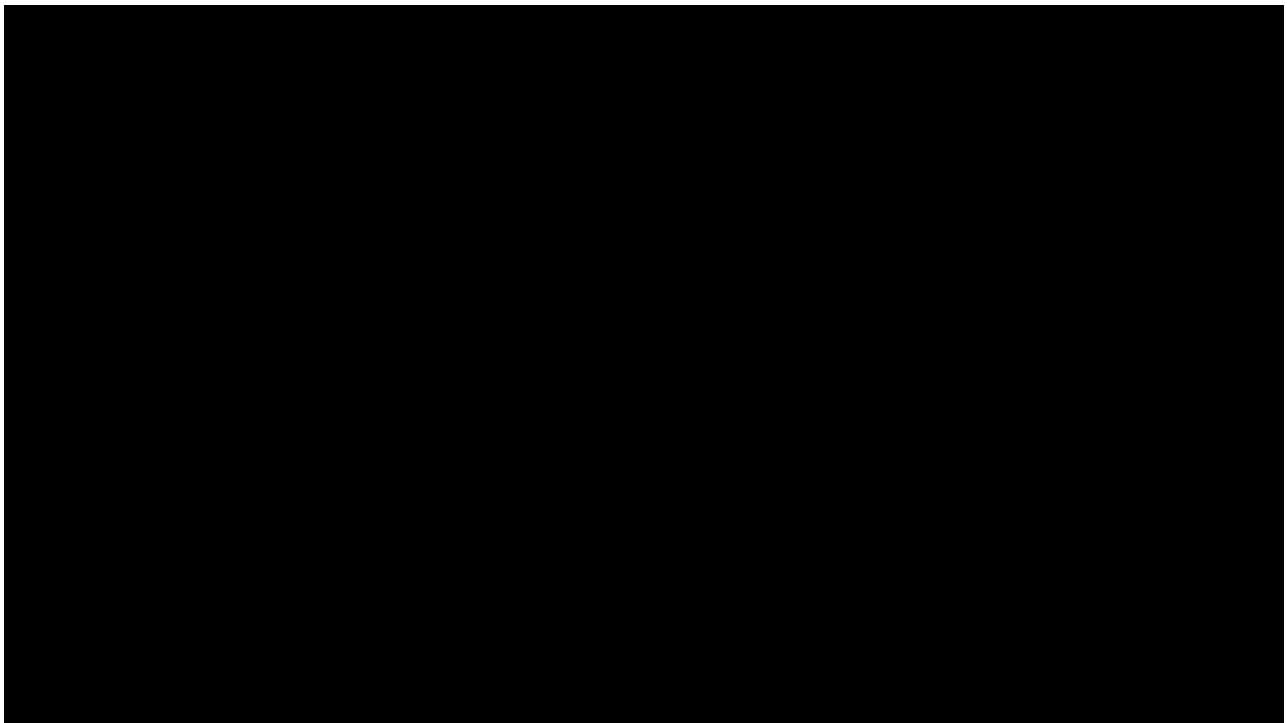
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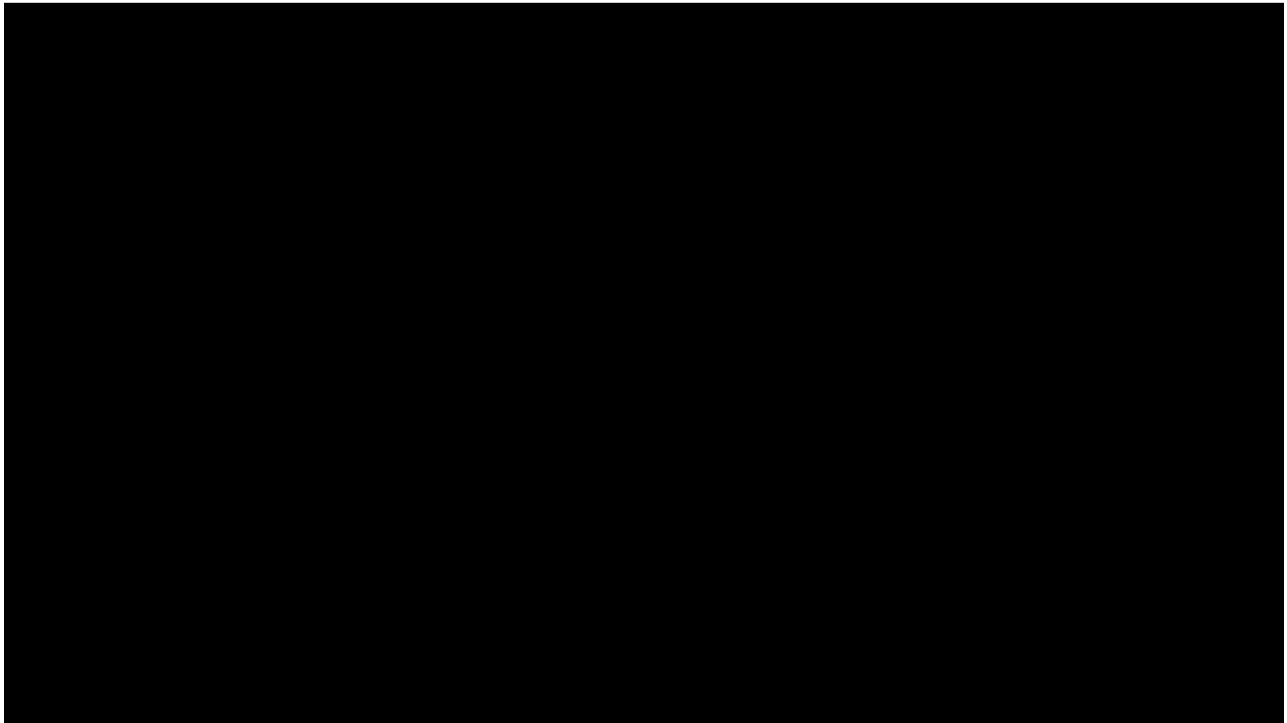
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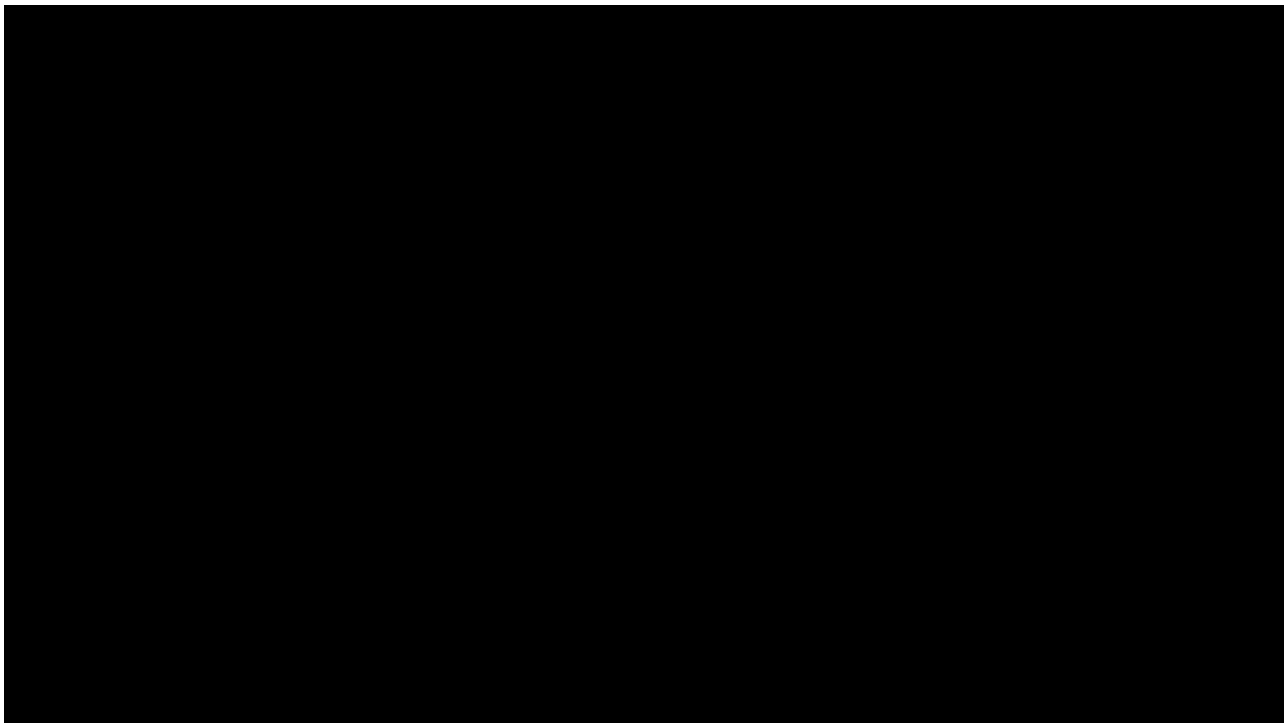
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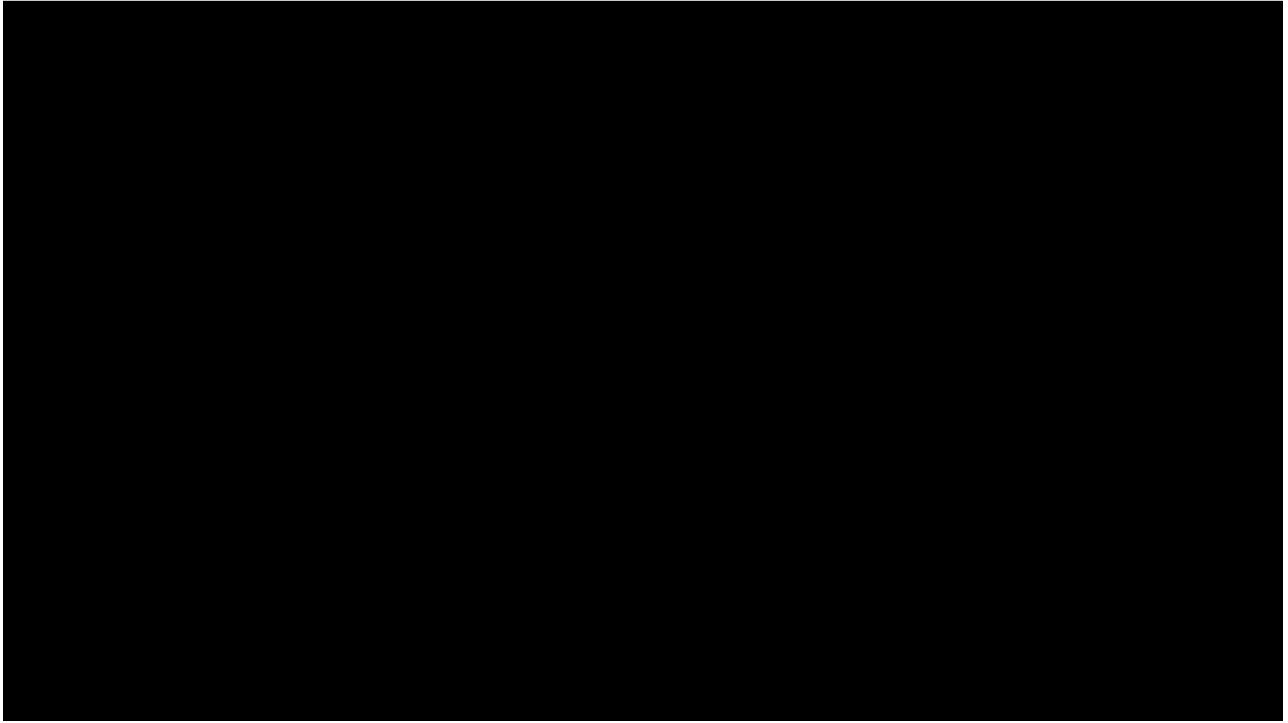
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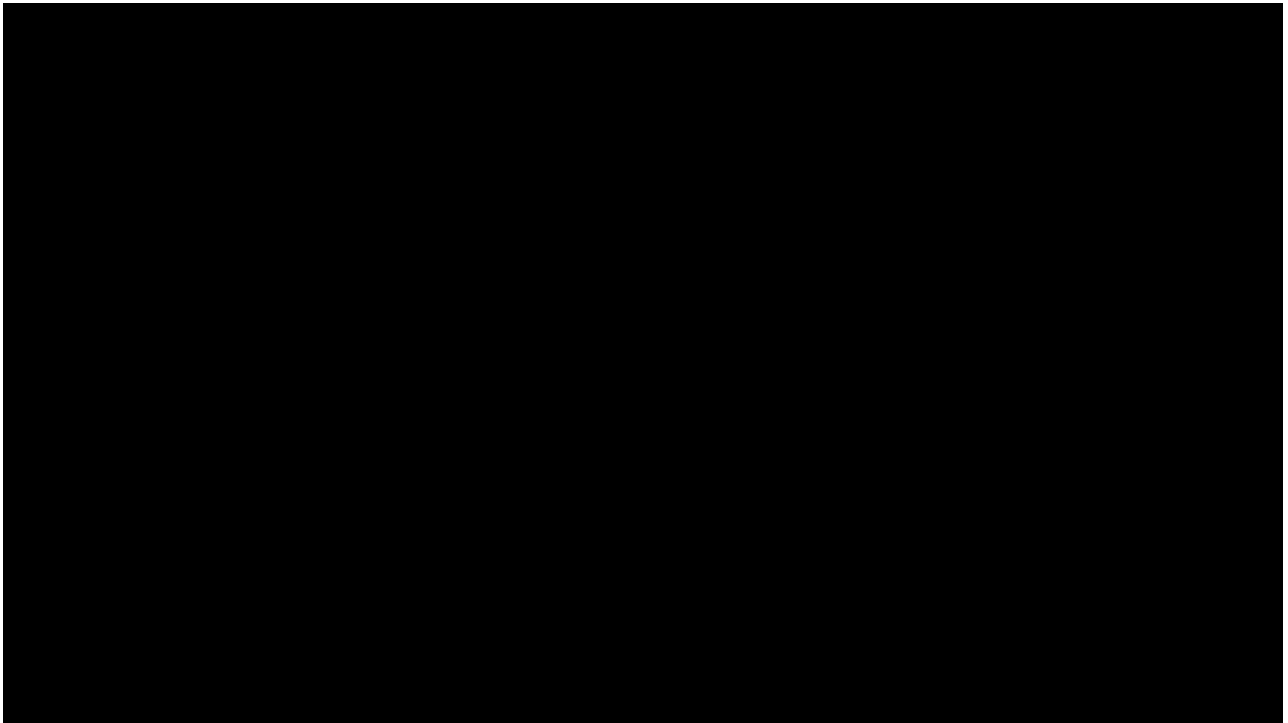
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What is Your Greatest Limited Resource?

- Fundamental challenge: TIME

- Working IN the business vs ON the business

- < time on Strategy and Technology Advancements

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Owner Time Shortage Solutions:

- Ambidextrous Leadership:

A blend of operational execution + strategic planning

Result: innovation, adaptability, growth, future-proofing your business

OR

- Hire a strategic visionary who can execute:
  - craft a disruptive, innovative strategy
  - Digital strategy execution
  - Ai and automation transformation

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True Ai Success is Rooted in a Strategic Foundation:

- Ai is becoming the standard

- True differentiation comes from Ai amplifying a disruptive innovation strategy

- W/O strategic differentiation, Ai adoption leads to parity, not dominance

INNOVATE
DOMINATE
AUTOMATE

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Phased Ai Adoption Approach: Crawl, Walk, Run…Dominate

PHASE 1: CRAWL: Standalone Ai Tools

Experiment with Ai Drive Platforms For:

- Content creation and research (ChatGPT, Jasper, Copy.ai, Grok, Perplexity, Deepseek)

- Graphic Design and Creative Marketing Tools (Canva, Galileo Ai, Visme)

- Social Media Management (Predis Ai, Buffer, Hootsuite)

- Email automation and segmentation (Mailchimp, Drip, ActiveCampaign)

- Productivity and Automation (Calendly, Grammarly, Motion)

- Meeting Transcription and Summarization (Plaud, Otter.ai, MS Teams Copilot)

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Phased Ai Adoption Approach: Crawl, Walk, Run…Dominate

PHASE 2: WALK – Ai Driven Operational Efficiencies

- Identify manual processes to create automated workflows
- Improve customer experience with AI-powered chat and support
- Leverage Ai for predictive analytics and lead scoring

CHALLENGE IN COMPOUNDING:

Siloed tech platforms with limited integration options

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Phased Ai Adoption Approach: Crawl, Walk, Run…Dominate

PHASE 3: RUN: Integrated Ai and Automation

- Connect Ai tools through API integration

- Utilize iPaaS solutions (Zappier, Boomi*, Workato*, MuleSoft*)

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Phased Ai Adoption Approach: Crawl, Walk, Run…Dominate

PHASE 4: DOMINATE – Integrated Ai Driven CRM + Martech Solution

Operational Perspective
- Provider and Patient Portal
- 360 view of customer (centralized data)
- Process automation and efficiencies
- Sales CRM + Lead nurturing
- Marketing Automation
- Precision solutions positioned
- Data-driven decisions/ enhanced analytics
- Scalability and Integration into PMS

Customer Perspective:
- Transparency in offerings and process
- Personalized experience
- Omni-channel interactions
- Reduced Friction: self-serve + quicker response time
- Enhanced trust and brand loyalty

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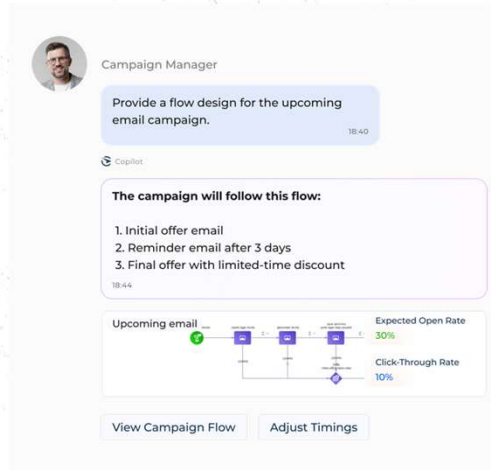
BONUS: Seek Out NO CODE

Allows non-technical users to build applications and automate workflows through a visual interface and configuration

- Democratizing software development
- Ease of customization
- Speed and reduced development time
- Empowerment
- Integration
- Scalability

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YOUR CALL TO ACTION:

Audit Your Current Strategic Plan
- Are you using disruptive innovation to formulate your UVP?
- Do you have a digital strategy in place?

Ai Implementation Plan:
- Map out your phased approach (crawl, walk, run…dominate)
- Identify opportunities today to leverage Ai to automate and enhance efficiencies while elevating customer experience
- Explore iPaaS and API solutions to connect your current systems
- Target a date to invest in an integrated CRM + Martech platform to span your operations

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CLIFF NOTES:

- Ai w/o disruptive strategy = incremental growth at best

- Ai grounded in differentiation = market dominance

- Phased Ai adoption is key – don't rush but don't wait

- END GOAL: an Ai powered fully integrated CRM + Martech
solution maximizes the technology by leveraging your won data into actionable insights

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GO Innovate, Automate, Dominate

SCAN ME

SUPPLEMENTAL
Ai RESOURCES

Suzie Glenn, MBA

Founder and CEO / Wellify Consulting

SUZIECONSULTING@GMAIL.COM

503.753.5699

wellify
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