

Workflows: Automate Repetitive Ops Tasks

Spare Connect 2026 · Pat Gregory, Senior Product Manager





What % of calls for PSTA are handled by AI Voice?

40%

What animal did Brad mention in the keynote?



What is the name of your brand-new AI assistant?



Scout

Your Host



Pat Gregory

Senior Product Manager, AI & Core

What we'll do today

01

Automation Today at Spare

02

Core Concepts of Workflows

03

Build a Workflow

Getting Started Checklist

1

Laptop is on and/or charging.

2

Connected to the Wi-Fi.

Network: TWGroup

Password: Event5500!

3

Logged into your organization in
Spare.

What we see

Moving data from one place to another

From an eligibility form to a rider profile

Repeated actions

Changing status' on a case

Customized notifications

Near-bespoke communications on status changes

Every minute spent on these is a minute not spent on a rider who needs help.



Building Workflows: The Power of Automation

Workflows allow you to build **customized processes** that have distinct **triggers** and **specific actions** that can be repeated.

Every agency has bespoke processes - so we built **Workflows**

This is one of the tools on your Spare belt, to transform repetitive tasks into efficient, automated operations.



Uptake today

597

Active workflows

77

Customers

101k

Runs per day

How Spare sees workflows used

Moving Data Around

Profile data, favourite locations

Notifications

Eligibility expiry, group memberships

Recurring Tasks

Scheduled jobs that run on a cadence

SFTP

Automated file transfers and data exports

Trying New Things

Low-risk experimentation with automation

What is a workflow - a single process

Three core components to every workflow

Trigger

e.g. A rider profile was created

Conditions

e.g. If the rider is below 18

Actions

e.g. send a notification

Anatomy of a Workflow: Detailed Options

Each workflow is built on three core components, offering a range of possibilities for automation.

Trigger

The initiating event that starts a workflow.

- **Event**
- **Scheduled**

Conditions

Rules that determine if a workflow continues to its actions.

- **Filter**
- **Loop**

Actions

The tasks performed when a workflow's conditions are met.

- **Information Management:** Find, create, update, or delete data
- **AI**
- **Communication:** Riders, admins, email
- **Data Export:** SFTP & CSVs

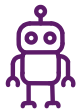
Scout is there to help you along the way!

Workflows Come With Peace of Mind



Full Audit Trail

Every workflow run is logged, providing a complete history of actions and outcomes for transparency and compliance.



Scout-Powered Debugging

Leverage Scout, our AI assistant, to quickly identify and resolve issues within your automations.



Built-in Testing

Design, test, and refine your workflows in a safe environment before deploying them live.

```
ncs-inter
C main.c M X
er_less2_exer1 > src > C main.c > main(void)
#include <stdio.h>
#include <zephyr/kernel.h>
#include <zephyr/logging/log.h>

MODULE_REGISTER(Lesson2_Exercise1, LOG_LEVEL_INF);
int test_var = 124;
main(void)

LOG_INF("Starting Exercise 1!");

/* STEP 4 - Add some logic to the application */

for (int i = 0; i < 10; i++) {
    test_var = test_var + 1;
    LOG_INF("test_var = %d", test_var);
}
return 0;

OUTPUT TERMINAL PORTS NRF DEBUG NRF TERMINAL DEBUG CONSOLE
TER
▼ MEMORY EXPLORER
flash ram
Priority Stack Usage Entry User Options
4 48 / 768 B log_process_thread_func 0 1 2 3 4 5
5 48 / 320 B idle 0 1 2 3 4 5
88 / 1024 B bg_thread_main 0 1 2 3 4 5
20000120 00 00 00 00
20000130 EC 00 00 20
20000140 01 00 01 00
20000150 00 00 00 00
20000160 CD 81 00 00
20000170 70 01 00 20
20000180 00 00 00 00
20000190 00 00 00 00
200001A0 00 00 00 00
200001B0 AC 01 00 20
200001C0 C0 01 00 20
Screen Reader Optimized
```

Demo

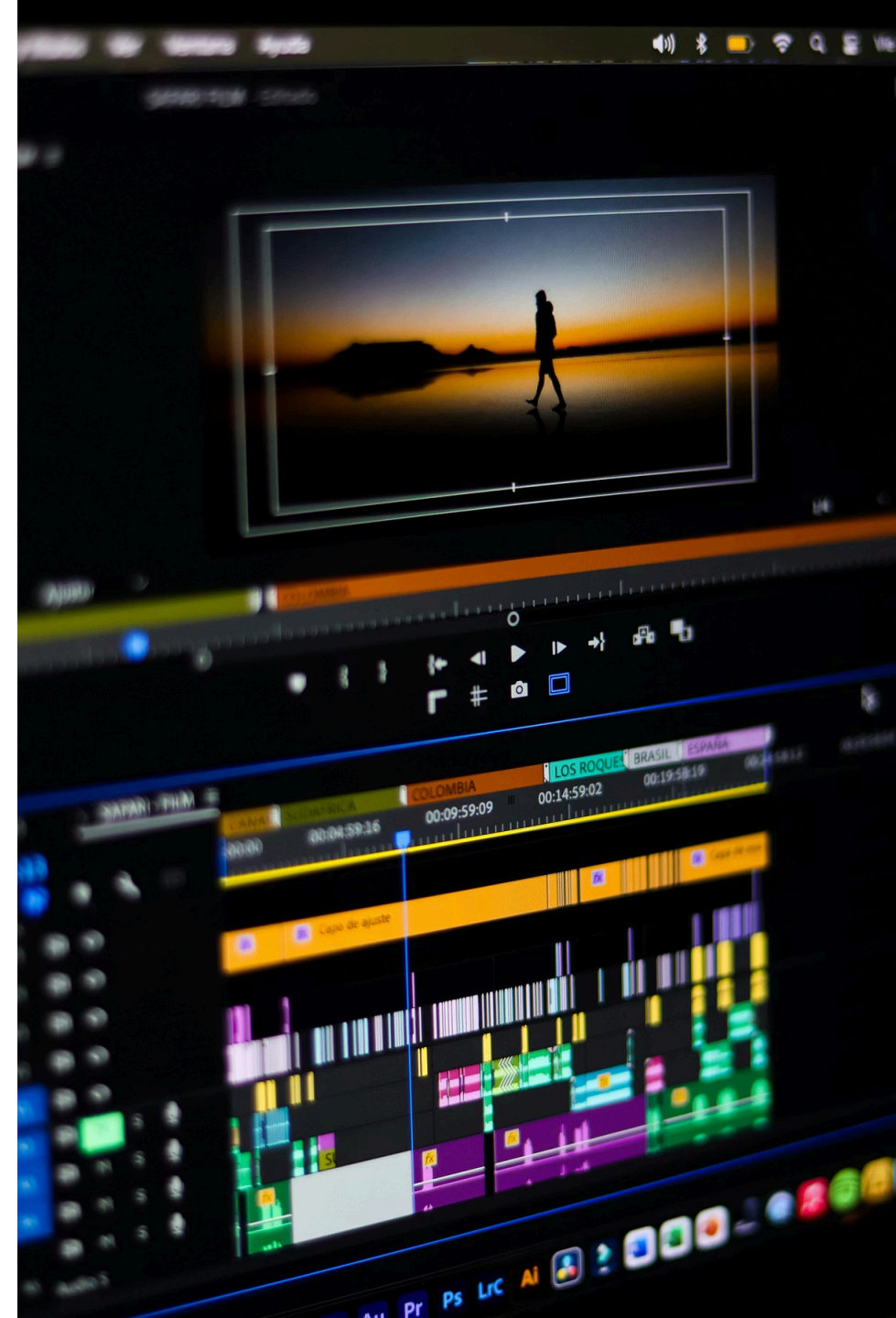
Let's build it. Together.

1 Trigger

Case created

2 Action

Send email



How'd it go?

What Next? Your Workflow Journey

You've seen the power of workflows and how they can transform repetitive tasks. Now, let's think about how you can apply this to your operations.



Identify Key Processes

Look for repetitive operational tasks or manual data transfers in your daily routine.

Design Your Workflow

Envision the triggers, conditions, and actions required to automate that process.

Chat to Scout

Our AI assistant can help you ideate and build your first workflow step-by-step.

Any questions?

The smallest useful version.

We're keeping this minimal so we can all build it together. One trigger, one condition, one action.

Trigger + Condition

Trigger

Scheduled — daily, 9:00
AM

Condition

Rider's group
membership expires in
30 days

Action

Your real version would chain in case creation, coordinator assignment, and group-specific copy.

Action

Send the rider a reminder email

What we just put on autopilot

Two things that changed

The deadline now watches itself

No spreadsheet of upcoming expirations to maintain.

The rider gets nudged in time

Every time, at the same point in the lifecycle.

What you'd add next at home

- Auto-create a recertification case
- Assign it to the coordinator on duty
- Branch the email copy by group (ADA vs. dial-a-ride)

✔ **Multiply this by 500 riders per month. That's the prize.**

Turn to the person next to you.

What's the deadline-driven task on your team that no one is quite watching?

60 seconds. Then we'll pull a few out loud.



USE CASE 2

Rider Onboarding

The five small things every new rider needs — done for you.



What customers run today

5+

Agencies Running This

5

Steps Per New Rider

Half a dozen agencies. Same five steps. One new rider at a time. Here's what that looks like in production:

"Create Favourite Location on Rider Profile Creation"

Adopted by multiple agencies – sets up the home location the moment a profile is created.

"Mailing Address Updates - Profile Created"

Sync mailing address from home address when blank.

"Set Mailing Address as Home Address if matching"

Defensive cleanup – catches edge cases before they become support tickets.

"Rider Profile - Home Address Created Checks ADA Service Area"

Service-area check the second the address is entered.

"Welcome notifications"

Admin-side or rider-side, depending on the agency.

□ **Every new rider, the same five small things** – that someone has to do by hand if a workflow doesn't.

The smallest useful version.

Same shape as before – different trigger type. Event-driven, not scheduled.

Trigger + Condition

Trigger

Rider profile created

Condition

Rider has a home
address

Action

Action

Create a "Home" favourite location from their home
address

In production you'd chain in mailing-address sync, service-area check, and a welcome email.

Let's build it. Together. (Round two.)

1 Trigger


Rider profile created

2 Condition

Has a home address

3 Action

Create "Home" favourite location from the address

 Hand up if you fall behind – we'll pause. Done early? Add a second action.



What we just put on autopilot

Two things that changed

Every new rider gets the same treatment

No "did anyone set up that rider's home location?" in standup.

Same mental model, different trigger

Event-driven instead of scheduled. Trigger → Condition → Action.

What you'd add next at home

→ Sync mailing address from home address (when blank)

→ Check whether the home address is inside the service area

→ Send the rider a welcome email

✓ **Five small things × every new rider this year = a meaningful chunk of someone's job.**



Turn to the person next to you.
What's the "same five small things" task on your team — done by hand, every time, for every new rider, driver, vehicle, or case?

60 seconds. Then we'll pull a few out loud.

Four habits to keep your workflows healthy

Test in a sandbox

Never build directly in production. Use a draft and a test rider account.

Name like a future you will read it


"ADA-Expiry-30Day-Notice" beats "Test 3 final v2" every single time.

Own it

Every workflow needs a named owner. Add yourself in the description if you built it.

Avoid spaghetti

If you're building your 7th workflow on the same trigger, stop and ask: should this be one rule with branches, or is there a native feature now?

 Spaghetti grows quietly. Audit your workflows quarterly.

Six more worth your time

1

Multi-stage healthcare form reminders

Deadline-breach triggers 1/3, 2/3, 3/3 nudges before timeout.

2

Letter status sync

Letter generated → update case status → copy fields to rider profile.

3

Group membership trip allowance

Warn at "1 ride left", archive at 0. Used by grant-funded programs.

4

Self-archive notifications

Rider deletes themselves → notify the mobility centre to retain records.

5

App review triage

Rider leaves a mobile app review → create a feedback case + tag sentiment.

6

Appointment reminders

Scheduled, sends 3 days before, includes accessibility instructions.

All six running in production today across [PLACEHOLDER: N] agencies.

The scoring framework

How to pick your next automation. Score each candidate on four criteria – 1 to 3 points each.



Volume

How often does this happen?

- 1 = monthly
- 2 = weekly
- 3 = daily+



Predictability

Are the steps the same every time?

- 1 = mostly judgment
- 2 = mostly rules
- 3 = always the same



Pain

How much manual work does it cost today?

- 1 = annoying
- 2 = a real slice of someone's job
- 3 = full-time problem



Risk

What happens if a step is skipped?

- 1 = nothing
- 2 = customer complaint
- 3 = compliance / safety / regulatory



Score 8+ out of 12? Automate it. Score below 6? Leave it alone for now. The middle band (6-7)? Talk to your CSM.

What I want you to remember

1 Workflows are the long-tail engine.

Eligibility expiry, onboarding, deadlines, letters, scheduled jobs – that's the sweet spot.

2 Trigger → Conditions → Actions.

Every workflow is the same three pieces. Don't let the UI intimidate you.

3 Score 8+? Automate it.

Pick your next one before you leave the building.

What customers run today

15+

Agencies Running This

30+

Active Workflows

All doing variations of the same thing. Here's what that looks like in production:

"Eligibility Expiry Notification - 30 Days"

The most common workflow name in the system, by far.

Three-nudge chain

"Re-Cert Reminder (90 days)" + "Auto-Renewal Reminder (60 days)" + "Eligibility Expiry Notification - 30 Days" — three workflows, one lifecycle.

Group-split expiry

"ADA - Expiry - 30 Days" + "GoDurham - Expiry - 30 Days" — different content per group, same trigger shape.

Mobility-type segmentation

One large paratransit agency runs 4 different expiration notices segmented by mobility type and Uber opt-in status.

Accessibility-aware letters

"Letter Generation - Recertification - Large Print" + "Letter Generation - Recertification - Regular Print"



Every one of these is the same shape. Scheduled trigger → check expiry → notify the right people in the right way.

Resources & next steps

Resources

→ Spare Help Center →
Workflows section
[PLACEHOLDER: link]

→ Handlebars
expressions in
workflows
[PLACEHOLDER: link]

→ Scheduled
workflows: timing &
timezones
[PLACEHOLDER: link]

→ Your CSM (they have
the workflow audit
template)

Find me

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Find me at the Spare booth.

Questions?



USE CASE 1

Eligibility Expiry

The deadline that everyone forgets — until they don't.