The Buy-It-Yourself Future: Is it Already Here?

How BIY platforms are transforming local

In Partnership with







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EXECUTIVE SUMMARY

The notion of a buy-it-yourself (BIY) platform has been out there for a while in the local digital marketing and commerce space. The incentives to create such a platform are compelling.

Most companies selling traditional advertising, digital marketing services, SaaS tools, websites, and similar products to small businesses using a direct sales force have at least mused about the possibility of driving down sales costs with an automated BIY platform.

There is also a view that a smart BIY platform would produce more predictable and sustainable sales results. The reason? Sales people are human and sometimes make mistakes, inconsistent performance, as well as placing their own interests (e.g., generating commissions) ahead of the small business operator's.

These behaviors lead to an erosion of trust. A BIY platform, in theory at least, could restore trust by producing a consistent performance, making recommendations based on customer need rather than what a rep needs to sell that week to meet quota.

For this white paper, Localogy conducted research into the prospects for BIY in local. We wanted to know whether the companies that sell advertising and software to local businesses believe in a BIY future.

Localogy conducted an online survey using a panel of B2B sellers to get a broad picture of the state of sales automation in the local/SMB space. We complemented this with an informal survey among thought leaders in the Localogy community. And we followed up with direct interviews with several of those who completed the questionnaire.

The picture that emerges is complicated.





Most believe sales automation is inevitable and to a certain degree, already here. Yet there was no shortage of skepticism that in areas with high degrees of complexity or where there isn't universal belief in the value of a product – digital marketing comes to mind here – the role of the salesperson will not erode any time soon.

Some digital marketing products, including websites, are well suited to BIY because most SMBs understand their purpose and value. Websites, arguably, are one such product.

As products mature and establish trust, like websites for example, and as small-business become more educated, BIY can extend into areas where it is now seen as ineffective compared with live sales agents.

There is cycle that all products go through, where sales is required early on to convince small businesses that they need a product. As product need is established, sales becomes less important, while aftersale service and support comes into play to drive engagement and upsell.

Another widely cited role for BIY is to expand the available market for a product by using it as a channel to reach businesses too small to be addressed by live sales agents. These BIY customers are often also DIY (do-it-yourself). These BIY/DIY buyers can be used as a funnel of prospects for sales and service teams to upsell into DIWM (do-it-withme) or (do-it-for-me) service models.



This white paper was commissioned by **Mono Solutions** for the purpose of gaining a better understanding of where the industry stands today on BIY and what is a likely near- and mid-term future for sales automation in local.





Introduction: The Big Leap to BIY

"Over and over I would have to explain that I was talking about the buying process, not the fulfillment process."

In September 2019, Localogy published a blog post that described a new "Buy It Yourself" TV Ad Planner tool from Comcast Spotlight.

A Comcast VP described the tool this way, "From education to execution, the online portal guides clients through the full process of planning, buying and airing their TV campaigns. This experience enables businesses to use data-informed TV schedules to reach their target customers and achieve the results that only TV can deliver."

The author of the blog post, Neal Polachek, has long advocated the notion of local media sellers moving to a BIY model.

"I had observed how the rapid development of data and tools had begun chipping away at many of the value-added services that local sales reps usually provide," Neal wrote in the post. "These [services] included background analysis, asking questions about audience, assessing digital readiness, and so on.

"To me, the logical next step of this gradual automation of the sales process was to take the sales rep completely out of the equation and let local businesses make their own local advertising choices, guided by an intelligent platform."

Neal spent the next few years getting mostly blank stares when he raised this idea in meetings and at industry events.

"Every once in a while, someone would nod their head and suggest I wasn't completely off my rocker. At industry event after industry event, I would posit the notion of a BIY platform for SMBs to purchase local media. Over and over I would have to explain that I was talking about the buying process, not the fulfillment process."



Today, the discussion over a BIY future doesn't elicit as many blank stares. And there is less confusion over BIY and DIY (do it yourself). Although many argue, correctly, that the two are inevitably connected as key elements of the customer journey.

Comcast's BIY rollout was a significant moment. It represented the first relevant example of an automated self-purchasing platform for local advertising aimed at small businesses.

Of course, small businesses have been self-purchasing digital products and services for some time now. The issue is, which products?

As Figure 1 below shows, Localogy's Modern Commerce Monitor[™] tells us that 30% of smallbusinesses that have acquired cloud technology to run their businesses purchased the solutions directly from the providers' websites. Another 19% found them via online marketplaces. Only 15% purchased tools from a sales rep and another 6% via an agency reseller.

Often, however, the tools that are purchased online are the type that can only be purchased online. Products that require a sales force generally are still using a sales force.

Figure 1: BIY Is Already Here

MAJORITY OF SMALL BUSINESS BUY DIRECTLY

Where SMBs purchased their cloud-based services



Source: LSA Modern Commerce Monitor™ Survey; Wave IV: N= 795 SMBs



The bigger conversation about BIY involves using automation in those places where live salespeople currently operate, either to replace (some if not all) salespeople or to use a BIY channel to reach previously untapped markets. Comcast's TV Ad Buyer is an example of the latter. It was developed to reach small businesses that could not be served economically by a live sales channel.

Bringing BIY into a live sales culture is a big leap technologically, organizationally, behaviorally, and culturally. Yet while skepticism remains across multiple points in the conversation about BIY, the idea is no longer laughed out of the room. However, the conversation about BIY today is less about replacing live salespeople than it is about using live salespeople and BIY in combination.

Measuring BIY Outlook and Adoption

Localogy has teamed up with Mono Solutions to test the waters on BIY and find out how the community of organizations that build and sell marketing and business operations products to local SMBs feels about the prospect of a BIY future.

We approached this effort is three steps.

- 1. We conducted an online survey using a panel of execs at companies selling relevant products to small businesses (e.g., digital advertising, CRM, booking software).
- 2. We sent a questionnaire to a smaller select group of local industry insiders to gather their insights.
- 3. We followed up with several of these insiders for deeper conversations about this topic.

These inputs lead us to the view that BIY is inevitable, but the progression to BIY may not be linear. As one product matures to the point where BIY makes sense, another may emerge that requires a direct sales effort to get off the ground.

And the long-term impact is not likely to be the obsolescence of live salespeople, but an evolution of their role in the local space.

We will share details of our findings in the next section of this white paper.





Part II: The Inevitability of BIY

"In companies that employ a salesforce, sales costs are the lion's share of all operating expenses."

For the first component of our three-part process, Localogy and Mono Solutions surveyed an online panel of roughly 100 individuals who work at companies that sell products relevant to small businesses (e.g., CRM, booking software, digital advertising, etc.) about how they view sales automation in the small business space.

Here are a few facts about the sample for context:

- 52% describe themselves as at the C-suite level; 31% are in sales and marketing roles.
- 42% sell their products directly and 43% use a combination of direct sales and channel partners.
- Only 7% report selling their products directly online as their primary channel.
- The sample provides a variety of products to small business the three leading responses were martech (18%), back office (16%) and CRM (16%). Martech and CRM in particular are in the sweet spot of solution that are typically sold to SMBs rather than bought by them.

What we learned from this survey is that there are very few non-believers out there. Most believe sales automation is inevitable. And many of the companies are themselves creating de facto automated sales platforms, one automated process at a time.

Here are some of the key survey findings:

- There is a widely held view that BIY is either already here or will be eventually. 37% say SMBs already BIY and another 48% say they will in the future. Just 7% said, "No, never."
- More than half (55%) already automate some portion of the sales process.



- Among those who do some form of sales automation, 22% do not plan to expand further. The rest plan to automate additional pieces of the sales process in the future.
- Of those who do not automate anything today, 60% plan to do so in the future. The hardcore that will not automate, now or ever, is less than 20%.
- There is near unanimity on the question of generational impact. 85% said younger business decision makers will be more willing to BIY and will impact future adoption.
- Among the obstacles to BIY adoption, the two most cited were convincing leadership of BIY's viability and SMBs' willingness to engage with BIY platforms.
- The benefits most anticipated from sales automation were: Lower sales costs (51%), better alignment of sales with customer need (51%), and higher customer satisfaction (47%).

Figure 2: Sales Automation is the Norm



DOES YOUR COMPANY AUTOMATE ANY PART OF THE SALES PROCESS?

Localogy/Mono sales automation survey; N=95

Individual components of the sales process are increasingly automated – notably routine elements like executing contracts and processing payments. Automated tools exist for every piece of the sales process, from need analysis, recommendations to completing the sale.





Figure 3: Automation Spans the Sales Process

WHAT DO YOU CURRENTLY AUTOMATE?

Localogy/Mono sales automation survey; N=52 Choose all that apply

Yet, many digital solutions in local continue to be sold rather than bought. This is particularly true for solutions that are adjacent to revenue in some way. For example, SEM, SEO, reviews management, reputation management and so on.

At companies that deploy direct sales to SMBs, "sales and marketing" is usually the biggest line item in the list of operating costs, often by a wide margin.

This has led many organizations to focus on the upper tier of the "M" in SMB.

Comcast, like other local media entities, undoubtedly had run the numbers on fielding a local sales team to reach the smaller advertiser and couldn't make the math work.

One widely recognized challenge with local sales is the wildly varying performance of local sales reps, not just in their volume of sales, but in the quality of the sales they close.

One of the strongest arguments in favor of moving to a BIY sales model (at least in theory) is that an automated sales platform would lead to a more consistent and predictable sales performance.

While reducing sales costs is a major reason why organizations dream about a BIY future, the notion of an intelligent BIY platform offers other benefits (again, in theory) that could justify developing a BIY platform.





Figure 4: Cost and Customer Experience

WHAT BENEFITS DO YOU ANTICIPATE FROM AUTOMATION?

Localogy/Mono sales automation survey; N=78 Choose all that apply

The case for BIY generally invokes the following list.

- Reducing Cost of Sales
- Higher Margins
- Better Alignment with Customer Need
- Lower Churn
- Higher Average Sales Value

Reducing Cost of Sales

This is a primary motivator for any organization selling to the small business market.

Josh Melick, founder of Broadly, which offer reviews management solutions to SMBs, said sales cost pressures are particularly acute in the SMB space.

"Anyone with a salesforce who looks at operating costs [feels this]. Margins are tight. You look at your operating expenses and hosting is 1%, credit cards are 2%, customer service is 15% and then sales and marketing is 60% and you're like, what the [heck]! It hurts."



Josh says this pressure is greater in SMB-facing companies vs enterprise-facing companies, where sales costs are a significant line item but maybe half as a percentage of operating expenses.

It's no surprise then that both our fielded survey sample and our "insider" group both rated this as the most likely positive outcome of BIY.

Higher Margins

It stands to reason that if BIY drives down the cost of sales, margins will go up. It may not be quite this simple. The investment that will need to go into developing BIY platforms will be significant. And some of the savings in sales is likely to be redirected to investment in customer service and success. In addition, BIY involves higher marketing costs in order to drive buyers to the platform.

Still benefits of BIY, including increased revenue predictability and an expanded customer base, could yield higher margins. And our survey respondents agreed.

Better Alignment with Customer Need

This is one of the more interesting benefits to ponder.

One of the visions for BIY is that the "machine", which uses artificial intelligence (AI) to improve recommendations over time, will strip away much of the human error that taints the local sales process and erodes trust, including overselling, high-pressure sales, and putting the seller's needs above the client's.

"I am working now with a company that is going through this. They have these car salesmen type reps and they are getting a bunch of churn," said Updopt CEO Chris Black. "These reps are getting a hold of prospects who are blinking in the headlights, who are really at the info gathering stage but instead get bullied into sales. You can't do that transaction anymore."

The experience Black describes, multiplied hundreds of thousands of times over, has eroded trust in local sales. BIY is one way to address this.

Lower Churn

Presumably, better-quality sales lead to lowers churn. And some we spoke with certainly made the argument that businesses that are not strong armed or oversold will likely churn at a lower rate than those that are.



However, the option "Lower Churn" was rated very low by respondents.

There may be a few reasons for this. One is that if BIY is used as a tool to grow volume by reaching a much wider available market, including lower value accounts that do not currently merit a sales contact, churn could conceivably rise, not fall.

Vendasta's CSO Jacqueline Cook offered this take.

"BIY will also bring with it increased churn (making it easy to buy will likely mean it's just as easy to cancel), however that just means the best products will thrive and grow and those that are 'sold' will reach a churn cap."

Mono Solutions' CEO Louise Lachmann added her perspective to the churn issue.

"While BIY is a great way to broaden the funnel for customer acquisition, it's also a model that is susceptible to high churn," Lachmann said, "Offering an upgrade path to serviced-based offerings is therefore paramount for retention and overall growth of your customer base."

Higher Average Sale Value

If a BIY platform succeeds in removing human error from the process, it stands to reason that the platform will optimize sales performance leading to higher average sale value. Right?

This only happens if the platform is engineered to maximize sale value. The better path is to optimize for making the "right" sale, which isn't always the biggest sale.

Driving higher average sale value may be the weakest argument for BIY. This helps to explain why it ranked next to last (ahead of reducing churn) among the potential benefits of BIY in our B2B survey.

There is also the argument that so much of what comes before the sales process is already automated, which strips away much of the added value that a well-trained sales force presumably offers. For example, background analysis, asking questions about audience, and assessing digital readiness have all been automated.

Therefore, completing the automation of the sales process is the next logical move.



Part III: Localogy Insiders See Promise and Friction in the Path to BIY

"Sales is evolving, and small businesses are no different than enterprise buyers. The power is shifting from the seller to the buyer."

The Localogy/Mono fielded survey gave us a reasonable sample (n=95) of responses to analyze, but the structure of the survey prevented us from following up with respondents for direct dialogue.

In order to gather some perspectives from the Localogy community itself, we sent a separate questionnaire, shorter but with a similar set of questions as the fielded survey, to a sample of individuals we know personally in the local digital and SMB tech space. We wanted their views on sales automation and the BIY future.

This smaller group of industry insiders was also generally bullish on the prospects for sales automation, with two thirds saying "yes" to the question, "Do you believe small businesses are willing to self-purchase (BIY) digital products and services?"

Some of these industry respondents let us use their names, while others preferred to respond anonymously.

Generally, this group sees small businesses moving inexorably toward BIY, the result of the gradual conditioning of the market to take the sales process (from evaluation through fulfillment) increasingly into their own hands. The real issue for some respondents is whether the BIY platforms are yet up to the task.



Here are some of their overarching comments, reflecting a range of views.

"Sales is evolving, and small businesses are no different than enterprise buyers. The power is shifting from the seller to the buyer. Buyers are informed and are happy to purchase products and services without speaking to sales, but the key is that you need to be able to support this type of transaction by ensuring that buyers can educate themselves, that they can opt to receive help when they need it and that the transaction is seamless and easy."

- Matt Matergia, Director of Business Development, Mono Solutions

"Yes, if it's simple enough and demonstrates immediate value. I believe this to be true as we are seeing examples of this working already, and because SMBs are becoming more informed, empowered and technically savvy. At the same time, people are recognizing user experience is no long a nice to have."

- Jacqueline Cook, Chief Strategy Officer, Vendasta

"To be successful, a BIY process will need to include a seamless handover to an assisted sales process midcourse -- if the buyer is confused, unsure or needs help, human support should be available."

- Rajeev Gupta, CEO, Adaan Digital Solutions

Some who we spoke with doubted that BIY will ever take hold among small-businesses, regardless of generation. This skepticism is based on the view that most SMBs lack the patience or comfort with technology to engage with platforms for all but the simplest of transactions.

"I am a staunch believer that this will never happen in my lifetime. And I believe this for two reasons. One, SMEs move so much more slowly than we think they will. And two, with the possible exception of GoDaddy, there really isn't a model out there that is doing this."

- John Goddard, CEO, Herold (Austria)





Part IV: Four Themes Guiding BIY Adoption

"It is ubiquitous to adopt any product by machine today. It is common. It is not weird. We are over that hurdle."

Several broad themes emerged from the combination of the results of our fielded survey as well as the comments our "insiders" shared in the separate questionnaire and follow up discussions.

Some of these themes point to aggressive adoption of BIY. Others suggest more caution.

Theme 1: BIY Has Arrived...for Commodity Products

Many respondents argued that BIY is ready to go now, essentially, but only for products that are easy to understand and require minimal consideration.

Here are some examples of this point of view.

Erik Bjerlestam, CEO of bfound, a Dubai-based digital marketing agency said: "It depends on the actual product. The more basic products as an online presence should definitely be possible to do by BIY. Campaign related products focusing on the customer journey process will be more difficult."

An SMB software startup veteran who preferred not to be quoted by name in the report said that for SMBs to BIY, a product must meet the following criteria:

- The product is well understood by SMBs
- The SMB has used the product in the past
- The SMB understands clearly why it needs the product
- The SMB seeks out where to buy the product.



"Anything that is not well understood or is new or is anything beyond a commodity-type of product is not likely to be self-purchased," the veteran founder said. "The moment a question arises in the purchase process, the SMB sifts into FUD [fear, uncertainty, doubt]-mode and 'abandons the cart'. Unfortunately, I have tested this in the real world."

This serial entrepreneur clarified his comments further: "IMHO BIY will work for a max of 20% to 30% of the market for any non-commodity product sold to SMBs. That means that it is not a stand-alone solution but part of a range of sales channels that a successful company must offer."

However, others made the point that what is a commodity today perhaps wasn't viewed that way just a few years ago. Commoditization has a life cycle.

"At one point, hosting was sold. Today it is bought," said Josh Melick, founder and former CEO of Broadly, a company that sold reviews management software directly to SMBs with an inside sales force.

Melick recalls that hosting companies would compete over features like load balancing or server reliability.

"Once all the software got written, and standardized, it became a commodity. Then there was a race to the bottom on price. Then it was bought, not sold."

While we are at pains to make the distinction between BIY and DIY in this report, it's useful to look at which products SMBs are willing to DIY as a possible indictor of which they may also BIY. Many of the same assumptions apply.

The 2018 Localogy/Mono White Paper, "Meet the New SMB SaaS Customer," featured a survey of small business owners asking which service model (DIY, DIFM, DIWM) they preferred for which products in the digital marketing stack.

The two most commonly DIY'd products were domains and websites.

Theme 2: Consumer Shopping Behavior Foretells SMB BIY

In October 2019, a group of partners at the consulting firm AT Kearney published an article on "Strategies for Selling Technology to Small Businesses." The partners who authored the piece had backgrounds in SMB tech, including Ben Smith, a founder of Merchant Circle.

One of the underlying insights in their recommendations is that small businesses behave like consumers in their purchase behavior.



Some cite this insight to argue the market is readier for B2B BIY than some may imagine.

"It is ubiquitous to adopt any product by machine today," says Updopt CEO Chris Black, referring to the behaviors conditioned by Amazon and countless other routine online transactions we conduct as consumers. "It is common. It is not weird. We are over that hurdle."

Theme 3: Digital Natives Will BIY

Other respondents made a customer segmentation argument. And generational change was one key factor behind this view.

One traditional media company exec put it this way, "Yes, I believe 'some' SMBs will be willing to BIY. But certainly not all. Segmentation is key."

Karsten Marquardsen, CEO of the German publisher Heise, said this, "Some digital first movers and young people will do this."

Rajeev Gupta, CEO of digital fulfillment company Adaan Digital Solutions, said this, "With the turn of this generation, most SMBs will be run by millennials - at that point, BIY will reach its critical mass."

Our fielded survey certainly supports this point of view.

Looking back again at the 2018 "New SMB SaaS Customer" paper, there was a clear generational linkage to DIY vs other service models. For example, 74% of the full small business sample surveyed for that report said they have used DIY for at least one component of the digital marketing stack. That jumps to 82% among decision makers ages 18-34.

Figure 5: Generation BIY

DO YOU BELIEVE GENERATIONAL CHANGE WILL DRIVE A GREATER WILLINGNESS TO SELF-PURCHASE?



Localogy/Mono sales automation survey; N=95



Theme 4: Don't Underestimate Resistance to Change

A commonly held view among the fielded survey sample was that organizational inertia was at least as big of a barrier to adopting sales automation as resistance from small businesses. Figure 6 below show that convincing leadership was a bigger barrier than SMB willingness to use the platforms.

While organizations have much to gain from sales automation. They notion of moving to a more automated sales process is fraught with risk. No CEO wants to go down in history as the one who killed the goose that lays the golden eggs.



Figure 6: Resistance to Change

WHAT ARE THE GREATEST CHALLENGES TO BIY ADOPTION?

Localogy/Mono sales automation survey; N=95 Select up to two choices

The Localogy industry insiders we surveyed seemed less concerned about organizational resistance than challenges with SMB adoption and the capabilities of the platforms. Some did articulate that the combination of sales resistance and a lack of bold leadership are holding back innovation in the sales channel.

"In every discussion with digital marketers, sales resists anything that significantly alters processes or competes with commissions," said Chris Black, CEO of Updopt. "Leadership often is unwilling to meet this push back unless they are under duress, usually when the old game isn't working anymore."

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Theme 5: BIY Offers a Path to DIWM

As noted previously, many regard BIY not as part of a migration to a purely automated sales environment, but rather as part of a broader channel strategy. BIY is really seen as a way to broaden the sales funnel, reaching customers that are either out of reach of live sales people or who prefer dealing with automated platforms. As noted, there is a generational component to this, but also a business size component.

An important point made repeatedly by those we spoke with for this report is that BIY doesn't mean the absence of human contact. Remember Neal's early struggles getting people to understand that BIY and DIY are two different things?

What BIY will likely mean in practice is that more of the human engagement will takes place after the sale, often through service models like do-it-with me (DIWM) or do-it-for-me (DIFM).

Without a live service channel to drive engagement with the product –- whether it's websites, SEM or some back-office SaaS tool – BIY runs the risk of becoming another source of new customers that churn off at an unacceptable rate, as Venasta's Jacqueline Cook pointed out earlier.

As we discovered in the 2019 Localogy/Mono Solutions white paper, "The Engagement Challenge," use of or engagement with a product or service has the clearest linkage to retention. Without engagement, there is churn.

Updopt's Chris Black sees this migration from sales to service as the future mode for addressing the local/SMB market with digital solutions.

"The platform determines what makes sense for the customer, and the sales rep becomes the support person," Black said.

"It's not any different than what you see more successful companies do. Like Zappos. They do not have salespeople. But its support people will take orders."







Part V: Conclusions

BIY is already here. The real question this white paper asks is, will automated processes replace sales that are currently made by living, breathing and commission-driven sales reps?

The short answer is "no, not entirely." The longer answer is far more complicated. It always is.

As many of the individuals we consulted for this report told us, the products that are sold to SMBs revolve in cycles. What is a differentiated product today will eventually become commoditized.

Ultimately BIY will come into play to achieve the following.

- Reduce, but not eliminate, the costs association with fielding a live sales team.
- Take essentially commoditized product sold via live sales teams today and push them through a BIY process that resembles a comparison-shopping experience.
- Reduce or eliminate the busywork that eats up sales time, freeing reps to spend their time more productively.
- Improve the process of needs analysis and product recommendation to eliminate "overselling" and other tactics that erode trust. The result should be better sales.
- Expand sales into customer segments that have been cost prohibitive to reach via a live sales channel. This will increase volume, and also potentially, drive up churn, at least in the short run.
- Accelerate the shift of emphasis from sales to a focus on after-sales service and support.

Our view, based on the conversations informing this report, is that, in the near term, BIY is unlikely to become commonplace for new products or products where the essential value is not universally accepted.

These new, non-commodity products will require live sales people to close, though more efficient, semi-automated methods like product-led sales will be employed to keep sales costs down and improve the quality of sales.

The longer-term outlook for sales automation is more bullish. As platforms become more sophisticated and as new generations take control of small business decision-making, we expect the comfort level with BIY will rise. And we believe its use will extend beyond commoditized products and services.



About Mono Solutions

Mono Solutions delivers the ultimate SaaS-based digital marketing platform for small businesses across the digital landscape to drive their business online. As a fully-white label solution, Mono empowers digital service providers with a true do-it-with-me (DIWM) approach to offer digital marketing solutions and deliver real ROI to their SMB clients. For more information, please visit monosolutions.com



About Localogy

Localogy, formerly the Local Search Association (LSA), is a not-for-profit trade association comprised of technology, marketing and media service providers and multi-location brands that enable the local marketplace to evolve and thrive. Ranging from Facebook, Microsoft and Google to Yext, Thryv and Yelp, Localogy's members represent today's top organizations serving businesses nationwide with a local presence. Localogy is dedicated to helping its members succeed through data and insights, education, events, consulting services and more. For more information or to become a member, please visit localogy.com

