25 things every business should automate

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Introduction

Marketing automation is everywhere in your inbox. It's the "sorry I missed you" email from a salesperson who just left you a voicemail. The birthday coupon from a restaurant. The reminder from a retailer that you added a product to your shopping cart but never clicked "buy."

Across industries, automation has become a key to success: Nearly 80 percent of top-performing companies have used marketing automation for more than two years, according to the research firm Gleanster.

But automation isn't reserved for big corporations. Small companies, too, can incorporate automation in every aspect of business: from capturing leads to closing sales to serving customers to checking routine office tasks off the to-do list. When repetitive processes are automated, small business owners can instead devote time to the goals that really matter—like growing the business.

In this guide, you'll learn about 25 things every small business should—and can—automate, and how automating processes is easier than you might think.

Read on to discover how automation can benefit six areas of your small business: leads, sales, e-commerce, customer service and engagement, events, and office management.

Leads

Whether you're meeting new potential clients or responding to those who have already called or emailed, automated processes allow you to gain and retain leads more quickly and efficiently.

1. Respond immediately to an email contact request

If the "contact us" email address listed on your website really means contact you, you'll quickly be overwhelmed by the number of emails awaiting your reply. And responding days later isn't an option. Waiting even 30 minutes to make contact decreases your odds of qualifying a lead by 21 times, as compared to calling within five minutes, according to the Lead Response Management Study.

With automation software, you can respond immediately every time—without even having to think about it. Instead of taking requests via an email address, add a "contact us" form to your website. Smart client management software like Keap can give you the HTML code needed for your site.

When a prospect completes the form by entering her name, email address, and comments, the automation software issues an email reply right away. The response is a prewritten template, but it can sound like you just fired it off.

"Hi, [First Name]!

Thank you for contacting us. I wanted to let you know that we received your note. Someone will be in touch shortly."

Your potential clients will be glad that her "contact us" note didn't disappear in an online black hole. Meanwhile, the software assigns you or a staff member to follow up with a phone call.

2. Assign inbound leads to a sales representative

Some people will always skip the “contact us” form and go straight for the phone. A phone chat is a great way to start building a relationship with a potential client, but without a process in place for pursuing leads, opportunities can be missed once you hang up. Too often, phone call follow-ups are filled with good intention and poor execution.

With automation software, you can set up an internal form to be used when people call your main line. Enter the client’s contact information, along with any relevant notes, before using a drop-down menu to assign a sales representative to follow up. The form alerts the sales rep to contact the new lead. Meanwhile, the software sends an automated introduction email from that sales rep to the potential customer.

When the introduction email is sent five minutes after the form is completed, it appears that the sales rep sprung into action after learning of the potential client’s call. Your lead will be impressed by your customer service before the sales rep even starts working.

3. Always win at phone tag

It’s easy to lose a game of phone tag when you’re busy running a small business. Say you leave a voicemail for a potential client, and he returns your call when you’re in a meeting. You make a note—in your mind, maybe on a Post-It note—to call him back when you return to your desk. But alas, voicemail again.

If the game continues, all while you’re chasing other players, you might eventually give up—either intentionally or because you were too busy to remember the call. That means you had a lead, and you lost it.

Keep score by establishing an automated process for returning phone calls. Using automation software, you can note in the system that you left a message for a contact. Doing so triggers an automatic email to him: “I just left you a voicemail. Sorry I missed you! If I don’t hear from you, I’ll follow up tomorrow.” The software then reminds you to make the call tomorrow, as promised, no Post-Its required. And no lost leads, either.

4. Follow up with new networking connections

At a conference or other events, networking efforts can pay off in the form of a big stack of business cards. But merely collecting business cards isn't the goal, of course. Start communicating with your new contacts immediately—before you both forget about the conversation you had (or before the business card falls victim to a tragic laundry error).

Transfer contact information from the business card to your CRM tool, tagging each person as a conference or event contact. Then use automation software to schedule an email to be sent, whether you want to follow up an hour later or the next day.

Writing even a brief "nice to meet you" email to each new contact can drain your time. Streamline the process by writing an email template that feels personal but could apply to any new contact from the event:

"Hello again, [First Name]!

It was great chatting with you at the conference this week. If my services can be helpful to you, I'd love to continue the conversation."

Want a shortcut? Download an app that scans business cards using your smartphone's camera and uploads contact information to your records. Keap's mobile app, adds a person's name, contact information, address and company directly to Keap.

5. Capture leads by offering free content

No matter how brilliant your products or services are, don't expect potential clients to readily invite you into their inboxes. The average person already receives 88 business emails a day, according to The Radicati Group, a tech market research firm. So when it comes to collecting email addresses, you might have to give in order to receive.

Content is a gift that keeps giving. By offering free content—like an ebook, PDF, video, or another type of resource—to those who sign up for your emails, you gain new leads and show off your expertise while you're at it.

Spare yourself from manually mailing resources by automating the process. Add a web form to your site that takes requests for content. When a lead enters his name and email address into the form, automation software delivers the requested resource.

Another benefit: Automation software can identify which leads were generated when the content was requested. Later on, when those leads make buying decisions, you'll have data to help you measure the effectiveness of your lead magnet.

Sales

Think of automation software as the project manager for your sales team. While software helps your team focus on the most important to-dos ahead, it also keeps track of leads who aren't yet ready to buy, ensuring progress at every stage of the sales journey.

6. Set a framework for your sales pipeline

The road from prospect to paying client includes a few stops. Mapping the route—and adding automation to the journey—helps your sales reps guide prospects from one destination to the next, ensuring no one gets lost along the way.

Automation software organizes the existing process that sales reps follow to close a deal. When the process is clearly defined, sales reps can move leads from one stage to another, ensuring consistency and providing visibility into where each lead needs to head next.

Define the sales process by four basic stages:

1. **New opportunity:**
   A lead has been identified. When a lead is tagged as a new opportunity, the software assigns a sales rep to contact him.
2. **Contacting:**
   The lead moves into this stage when a sales rep calls him. If the sales rep reaches him, the lead advances to the next stage. If the call goes to voicemail, an automated email is sent as a follow up (see item No. 3: "Always win at phone tag").
3. **Engaging:**
   The sales rep is talking with the lead to learn about his needs and how your product or services can benefit him.
4. **Qualified:**
   The lead moves into this stage when the sales rep determines that he's qualified, meaning that he has the budget and authority to make the purchasing decision. The rest of the sales process plays out from here, with different automated actions set up for wins and losses, as well as leads who aren't yet ready to make a decision.

7. Focus on your hottest leads

Having more leads than time to contact them is a problem—a good one, of course, but one that needs a solution nonetheless. If you never seem to catch up with your to-do list, where do you even begin?

Automation software sets your priorities by ranking each lead based on his or her engagement with your marketing efforts. Thanks to this lead scoring, you can focus on the potential clients who are ready to buy over those who need more time. By identifying leads based on their level of interest, you can better anticipate their needs and target them with messages tailored to their current mindset.

8. Stay engaged with prospects who aren't ready to buy—yet

You wouldn't propose marriage on a first date, right? The same logic applies to a new prospect. In the B2B world, 73 percent of leads aren't yet ready to become clients, according to a report by the research firm MarketingSherpa. Rather than asking for a sale during your first meeting, establish trust by cultivating the relationship over time, until the prospect is ready to make the big decision.

Automating a "lead nurturing" process prevents prospects from slipping through the cracks, allowing you to keep in touch without having to remember to do so. When a lead is identified as someone who needs more time, automation software can send an email each month that gently pushes the lead toward a sale.

Each month, send resources that educate the lead about your business and address common questions they might have. Be sure to include options for increasing or decreasing the frequency of the communications. Ask them to click a link if they'd rather receive emails every other month. Set up another "contact us" link they can click when they want to talk to you or a sales rep. With automation, that click triggers a task for you to contact to contact them.

While lead nurturing gives the lead more time, it also ensures that you or a sales rep focus on the leads who are most prepared to buy. On average, nurtured leads result in a 20 percent increase in sales opportunities, compared with leads that didn't receive that attention, according to a study by the B2B marketing publication DemandGen Report.

9. Welcome a new client

A sale isn't the end of your relationship with a client. In fact, it should be the beginning. Make a good first impression by sending a series of welcome emails to show new customers that you value their business and care about supporting them.

Staying in touch is effortless with automation software. Set up your software so that a purchase triggers an email series. In the first email, sent immediately after a purchase, include a thank you and an introduction to your company—whether that takes the form of answers to frequently asked questions or an overview of what your services entail. Consider sending a thank you gift, like a discount on the client's next purchase.

Check in again shortly after the client has started using your product or services to see how they're doing. Include helpful content, like tips about using the product or a how-to video, or suggest complementary products that may be of interest. A few days later, solicit feedback by sending a survey or asking how your business could improve. If the client is dissatisfied, you'll want to take action sooner than later.

Welcome emails have benefits beyond the warm and fuzzy kind. According to a study by Experian Marketing Services, welcome emails have an open rate of nearly 58 percent—compared with less than 15 percent for other promotional emails. Now more than ever, you have your client's attention.

Ecommerce

10. Generate repeat business

For most business owners, a sale isn't a one-time event. You want a customer to buy again—and again and again, especially if you sell a recurring service or a product that needs to be replenished on a regular basis. After all, the probability of selling to an existing customer is 60 to 70 percent—compared with 5 to 20 percent for a new prospect, according to the authors of the book Marketing Metrics.

Don't wait for customers to realize they need to restock and slowly come around to making the purchase. Be proactive by automating prompts for future sales.

Automation software starts the clock when a sale is made, and sends a follow-up email after a predetermined length of time. If you sold a 30-day supply of a product, your customer will automatically receive an email shortly before it's time to reorder:

"I know your supply is running low. Would you like to buy more?"

In the email, include a link to the product so the customer can simply click and purchase without having to search around your website. In these situations, automation offers a win-win: convenience for your customer, sales for you.

11. Remind a customer about an abandoned shopping cart

In your email promoting a new product, you conveniently included a link to an order form to inspire on-the-spot purchases. A customer read the email. They clicked to place her order. And then...no sale.

That scenario plays out more often than not: Studies suggest two-thirds of online shoppers abandon shopping carts. Maybe the customer decided not to buy. But maybe they weren't ready—or simply got distracted and forgot to complete the purchase.

Either way, don't give up. When automation software detects that a customer visited an order form without making a purchase, it can remind customers to follow through. You can schedule one reminder email to be sent 30 minutes later, with another reminder sent the following week.

If you were ever one click away from buying shoes before you had second thoughts, you know that big retailers employ this strategy all the time. And for good reason: According to tech research service BI Intelligence, 63 percent of abandoned merchandise may be recoverable.

12. Stay on top of failed billing charges

When a customer changes or loses a credit card, your business might not have made his list of records to update. Billing charges that don't clear, even for a short period of time, can have a detrimental impact on your bottom line.

Be proactive about collecting payment by establishing automated processes. For subscriptions and other fees collected on a recurring basis, set up a trigger for the software to notify you when a billing charge fails. The notification prompts you to reach out to the customer, allowing you to collect payment as soon as possible.

Prevent some failed charges from happening in the first place by catching credit cards on the verge of expiration. Set up an automated process in which the software scans customer information stored in your client management system for credit cards due to expire in 30 days, triggering a reminder to reach out to customers about updating their cards.

Customer Service

Automation allows you to treat clients as you would if you had more time. Help clients immediately, respond to their feedback and even send wishes for a happy birthday.

13. Make it easy for clients to ask for help

When a client needs help, nothing is more frustrating than a hard-to-find contact link and a slow-to-respond company. Six in ten consumers have decided against an intended purchase or business transaction because of poor customer service, according to a report prepared for American Express. Make sure your business meets—and exceeds—the client's expectations every time by automating a process for responding to help inquiries.

Include a "contact us" link in every email to spare clients the task of locating it on your website. When a client clicks the link, automation software tells you, or a predetermined staff member, to follow up.

With an automated process, the client receives a better, faster and more personalized answer than they would have by contacting a general phone number or email address. In the software, employee names can be added to a contact drop-down menu to ensure that to-dos are routed to the appropriate people. By assigning certain staff members to certain types of requests—a support rep for a technical issue, a salesperson for a prospect inquiry—you immediately connect the client to the person who can help the most.

14. Send appointment reminders

In our overscheduled world, leads and clients need reminders about appointments—and reminders of reminders, too. Forgotten appointments translate to wasted time and money for your business, but you can't afford to spend hours playing each client's personal assistant. While you're responsible for scheduling appointments, software can handle things from there.

With automation software, leads and clients can receive appointment reminders via email after you complete a web form containing the client's name, email address, and appointment date and time. The form prompts a sequence of emails: an appointment confirmation, followed by reminders in the days or hours prior to the appointment. If the client or lead cancels, the software will automatically notify you so you can follow up and reschedule.

Still, the task of comparing calendars and manually scheduling appointments can consume hours of your day. To take automation a step further, consider using a scheduling tool that syncs with your Google Calendar. Using your business calendar, it allows leads and clients to view available times and schedule a meeting—making the appointment process completely automated.

15. Gauge client satisfaction

Positive or negative, the results from a satisfaction survey can give you the information you need to improve your business. The customer isn't happy? Find out what went wrong or what you could have done differently. client loves your product or service? To replicate your success, find out why the product resonated with her.

Using automation software, email a survey link to clients who recently made a purchase. The survey, a web form, can be as simple as one question—"How satisfied were you with your recent purchase?"—with three multiple-choice answers: "not satisfied," "neutral," and "satisfied."

Automate your follow-up accordingly. Set up the software so that a negative response triggers a task to contact the client via phone or email. Reaching out quickly can prevent further damage. The majority of consumers give companies another chance after an initial poor customer service experience, but nearly 60 percent will switch companies after a second or third negative experience, according to a report prepared for American Express.

If the response was positive, send an automated email to thank your client and ask if they'd be willing to tell you more about their experience. A story from a happy client can be rewarding—and not just emotionally. A client testimonial shared on your website (with permission, of course) can be a personal, powerful way to convey the value of your product or services.

16. Ask clients for referrals

It's the oldest marketing strategy in the world. Word-of-mouth is the most trusted form of advertising, with 84 percent of people saying they completely or somewhat trust recommendations from people they know, according to Nielsen.

But sometimes, clients need a little reminder (or an incentive) to spread the word. Ask clients to give referrals by sending an automated email. To encourage them to take action, you might offer a small gift or coupon as a token of your appreciation.

When the client enters a friend's name and phone number into a web form, your software will issue a task for you or a STA member to call the referral. Why the old-school call? Emailing contacts without their direct permission puts your email at high risk of being flagged as spam, which could lead to your messages being blocked by inboxes. Pick up the phone, then ask about opting in to your emails.

17. Clean up your email list

"The more, the merrier" doesn't apply to email lists. All subscribers initially said they wanted your emails, but over time, some change their minds and become uninterested in reading them. Continuing to email them, anyway, can hinder you from reaching the people who want to hear from you.

That's because email providers like Gmail measure engagement—how often people open, click and otherwise interact with emails—in order to detect spam. High engagement tells Gmail that people want your emails. Low engagement suggests that they don't—especially if some people mark your emails as spam. If that trend continues, Gmail might label you a spammer and block all of your emails from inboxes.

With automation software, you can prune your list by targeting inactive subscribers. Because software tracks engagement metrics like opens, clicks, orders and web form opt-ins, you can single out subscribers who have been M.I.A. (120 days is a good measure).

Once the low-engagement crowd has been identified, schedule a series of three automated emails asking, “Do you want to keep receiving my emails?” Because you’re targeting known non-responders, use an arresting subject line like, “Hey!” (It worked for President Barack Obama’s re-election campaign). In the email, give readers the choice of two links. If they click “yes,” the software will remove the “inactive” label. If the answer is “no,” they’ll no longer receive your emails.

Spam reasons aside, email list hygiene is important for your marketing efforts. Realistically, your target demographic isn’t everyone on the planet. Paring down your list allows you to better understand your clients’ needs and interests, helping you craft more precise messages.

18. Retrieve lost passwords

If clients need a password to access areas of your website, it’s inevitable that they’ll forget it at some point. Locating passwords shouldn’t be the equivalent of digging through a lost-and-found bin. With automation software, the process takes only a moment.

To retrieve a password, a client types her email address into a form on your website. The form syncs with her contact record, which includes a password field. The client then receives an email containing her password, as well as a link to your login page. Once you’ve set up this automated sequence, she can forget her password as often as she’d like.

19. Remember every client’s birthday

With automation software, remembering birthdays is a piece of cake. But before you can send a birthday message, you need dates. Collect birthdays by sending an automated email asking, “Can I get your birthday on file so we can celebrate with you?” A link takes the client to a web form. They enters their birthday, which the software adds to thre client’s information in the client management system.

Then set up an automated email to send a birthday email on the big day (or perhaps a few days in advance if you’re including a time-sensitive offer).

Use an email template with a bit of personalization:

"Happy birthday, [First Name]!"

Whether you're sending a coupon or simply wishes for a good year ahead, your client will be touched that you remembered.

20. Gain social media followers

If you're using social media (and you should be!) for your marketing efforts, you can use automation to beef up your followers. Whether you tweet every day, create a Facebook event every week, or pin like crazy to display your new products on Pinterest, social media platforms provide a great way to stay in front of clients without bombarding them with emails. But if a social media campaign is posted and no one sees it, did it even happen?

Gaining fans and followers on social media is almost effortless with automation software. Send clients an automated invitation to check out one of your social profiles:

"Did you know that we post how-to videos on Facebook every week? Click here to check out our Facebook page."

When a client clicks the link, your software's work is done. You can't guarantee that customers will decide to "like" your page, but at least you've made them aware that your profile exists.

P.S. Add a P.S. to your email for the inevitable clients who don't use social media: "If you aren't on Facebook, could you please click here to let me know?" If the client clicks the link, the software takes note so you don't ask again in the future.

Events

Hosting an event keeps you busy enough. Let automation handle some of the details, like registrations, confirmations and promotion.

21. Automate the event registration process

If you're planning an event, your to-do list can easily grow into a to-do book. Focus on the big picture by automating some of the most timeconsuming tasks of event planning: sign-ups, confirmations and reminders.

On your website, take RSVPs in the form of a ticket purchase or, for a free event, through a simple web form that collects the attendee's name and email address. With automation software, the purchase or completed form triggers a confirmation email that includes a thank you for signing up, as well as key event details like the date and time, location and schedule.

Having no-show nightmares? Schedule an automated email to be sent the week or day before the event as one more reminder.

22. Promote Facebook events

A Facebook is a great way to share an event with your followers—and, ideally, for your followers to share the event with their followers. But creating a Facebook event isn't an "if you build it, they will come" situation. Attracting attendees requires continuous promotion.

Drive more traffic to the event page by sending automated emails to your contacts. Make it personal:

"Hi [First Name],

We'd love for you to attend our upcoming event."*

Provide a brief description of the event, but save some details for the link to the Facebook page. Ask the reader to click to find out more.

If she clicks, you might gain (at least) one more attendee. If she doesn't click, try the last-minute approach by scheduling an automated email to be sent the day before the event.

Office management

23. Make routine to-dos more efficient

Automation can't (and shouldn't) replace every task performed by people. But it can improve repetitive processes that require the human touch, helping you and your staff members save time and stay organized.

For example, maybe you send a handwritten thank-you note to every new customer. In the end, the task can only be achieved with pen and paper. To get there, though, you can set up an automated process to help you complete and track the task.

When a new client is identified in the client management system, it can issue a task reminder to write the note. Set up the reminder to pull the client's address from the contact information stored in the system so you don't have to look it up. The software also helps you keep track of these to-dos to ensure you didn't miss anyone on your list.

24. Send and receive important documents

Whether you're sending contracts or collecting tax forms, documents play a critical role in many businesses. That doesn't make them worthy of your time. Leave the paper-chasing to your software by setting up automated processes.

Say you hired several freelancers to launch a new project and need to collect their W-9 forms for your records. Identify each new client in the system with a tag so it knows whom to target with an automated email asking for the form to be completed and returned to you. Include a link to download the form on the Internal Revenue Service website.

When a completed form arrives in your inbox, make a note in the system so that the software knows that freelancer is off the hook. If the link goes unclicked, the software automatically follows up with reminders.

25. Collect job applications

As a small business owner, you might not have big-company resources to facilitate the hiring process, like an online job portal or a human resources team. Simply collecting job applications via email could work perfectly well for your purposes. But until it's time to review applications and schedule interviews, you don't need to personally manage the process.

Employ software to automate the early to-dos involved with hiring. On the webpage where you posted a job description, ask interested candidates to submit names and contact information via a web form. When the form is completed, the software sends an email asking the applicant to confirm his email address.

Once the email address is confirmed, the candidate is directed to a second web form, where they're asked to write responses to a handful of preliminary interview questions about his strengths and work experience. At that point, the software calls in the boss, creating a task for you to review the application.

Besides saving time, an automated application process has another advantage. Sending one email to apply for a job is easy. Following this process is easy, too, but you might lose a few applicants along the way—and that's OK. If candidates can't follow a few simple directions, they're probably not the people you want to hire.

Thanks for spending time with us! We hope you picked up a few—or 25—ideas about how automation can make your business more organized and efficient.

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Amy Saunders

Amy Saunders writes content that inspires and empowers small business owners. Writing about business brings Amy's work full circle: She began her career as a business reporter at The Columbus Dispatch in Ohio before becoming a features writer. After more than six years there, she moved to Phoenix, where she was an editor at a content marketing agency before writing for Keap. As a lifelong Midwesterner, Amy promises to never take Arizona weather for granted and spends her free time riding horses, playing tennis and hiking in the sun.

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