

A complete guide to business automation



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Chapter 1: What is automation?

Wheels are in motion. For those who own a business, it's either hop on board or get out of the way!

Savvy entrepreneurs are embracing business automation and are finding today's innovative and sophisticated, yet user-friendly, technology is empowering them to overcome everyday obstacles and to grow their business. The best part is this automation isn't solely reserved for big businesses with deep pockets. It's also transforming how small brands operate, enabling them to generate greater revenue using fewer resources.

Just like the behemoths, small companies are incorporating automation into key aspects of business, from lead capture to sales to customer service—and everything in between. And by automating repetitive processes within these realms, small business owners are liberating themselves and their employees to spend more time on big-picture strategies centered around expanding their company and solidifying its presence in a crowded marketplace.

So, what exactly is automation?

Automation, simply defined, is the use of technology and software to assume control of processes. Its goal is to boost efficiency and reliability. Successfully incorporating automation into a business can reap many benefits, including lowering its costs, enhancing its productivity, and limiting its errors, to name just a few (see Chapter 2 for more).

A popular (and silly) misconception about automation involves the notion that small businesses must retool their workforces, replacing human employees with high-end robots, if you will. Granted that's a fun premise for a sci-fi movie, but it's not exactly what's going on with [today's automation](#). What is going on is that small business owners are intelligently automating critical areas of their operations—and then wondering why they waited so long to do so.

Implementing automation doesn't necessarily mean a small business needs to spend a (insert throat clear) “bot-load” of cash on high-end hardware and intricate software that features the latest bells

and whistles. In many cases, it simply uses basic technology to reduce or eliminate human participation in a task. With even the simplest automation in place, a small business owner and his/her employees can focus on more crucial and fun tasks, and those elements of the business that greatly need the human touch, which shouldn't be forgotten.

Automation can take many forms, including email automation, sales/sales pipeline automation, and business process automation, to name a few.

Here's a closer look:

Email automation

Per wishpond.com, there are 3.2 billion email accounts worldwide, and 91% of email users check their accounts for new messages daily. With those eye-popping stats in mind, it's easy to understand why email automation is such an integral part of a successful small company's efforts.

Creating and sending automated emails to customers and potential customers can help a small business grow without having to invest valuable time and effort beyond the initial set-up. Innovative [software](#) can efficiently take the place of a business owner and/or an employee in sending emails. What used to take a human hours to complete is being accomplished in moments via automation.

Smart small businesses are implementing automatic email campaigns to send relevant information to a customer or potential customer when that person meets a certain trigger. And while it might sound rather impersonal, email automation, when done correctly, can create valuable relationships through personalization.

For more insight, check out [20 tips for sending automated emails without sounding like a robot](#).

One specific email segment in which automation has made a huge impact is email marketing. According to a recent survey conducted by MarketingProfs, more than [44 percent of email recipients](#) made at least 1 purchase as a result of a promotional email.

Sales/sales pipeline automation

A sales pipeline is a business concept that involves moving prospects through the various stages of the sales process until they make a purchase. Automating the pipeline greatly helps a company's sales staff follow a potential customer's path through each stage of the purchasing process, and careful management of the sales pipeline through such automation enables the sales staff to convert more prospects into sales.

From writer Amy Saunders, in Keap.com's "[In the Pipeline:](#)"

"Using automation software in your sales process ensures that every lead is accounted for, that contact information and notes are readily available, and that you always know what you need to do next to move the deal along. With that information, you can more accurately make revenue forecasts and process changes that result in noticeable business improvements. You don't need software to close a sale. But when you use it, you can close more sales, more consistently and more efficiently—allowing your business to grow and succeed."

Business process automation (BPA)

BPA leverages technology to execute recurring business processes. In other words, instead of having its employees perform menial and simple tasks on a day-to-day basis, a business turns to software to take care of such time-gobbling—and often mind-numbing—duties.

BPA also curtails human error by routing key data to the proper person at the right time via user-defined rules and actions.

Some commonly automated processes:

- Lead nurturing
- Customer support
- Invoicing
- Collections
- Payroll

Automation is expected to grow exponentially in 2020 and software, such as Keap, can manage a company's routine chores, plus other more challenging tasks.

Chapter 2: Benefits of automation

As mentioned in Chapter 1, there are many benefits created by business automation. Here's a deeper look at 3 biggies:

1. Saves time

Perhaps the most significant benefit of automation is its ability to free up time for small business owners and their employees to focus more on revenue generation instead of completing manual, [repetitive tasks](#). Don't ever forget, computers are faster than humans at most things.

According to a [Smartsheet Inc. report](#), more than 40% of workers surveyed spend at least a quarter of their work week on manual, repetitive tasks, with email, data collection and data entry occupying most of their time. Furthermore, nearly 60% of workers surveyed estimated they could save at least 6 hours per week if the repetitive aspects of their jobs were automated.

Read the previous sentence one more time. (Go ahead, we'll wait). It's quite an argument for embracing automation in today's mercurial business landscape.

2. Lead scoring

Automated lead scoring involves applying a value to a prospective consumer based on their interactions with a brand.

Why is automated lead scoring important? Max Schleicher explains at [inboundnow.com](#):

“Because you can determine which leads have enough engagement with your brand to be qualified to move on to communicate with the sales team. That's crucial—especially for young startups.

He continues:

“As your funnel grows, your lead scoring needs to be ready to scale. As you attract bigger clients, you need to make sure your sales team is streamlined to give the most attention to the most important leads. Automated lead scoring does just that.”

3. Better customer service

According to a study conducted by [McKinsey, 70% of buying experiences](#) are based on how the customer feels he or she is being treated. Being liberated from recurring tasks will allow business owners and employees to turn their attention to more critical tasks in the customer service/follow-up realms that require a human touch.

Per the [brevetgroup.com: 80% of sales](#) require 5 follow-up calls after the initial contact, and nearly half of sales reps (44%) give up after just 1 follow-up. With those figures in mind, automation can help create the time and resources needed for a company to practice persistence and perseverance in the sales process.

Chapter 3: How can small businesses use automation?

Fortune 100 companies are embracing every automation technique possible. Businesses that aren't participating at least a little bit will soon be left behind.

To remain profitable and competitive, small businesses also are investing in automation technology and software. Sales and marketing are key automation areas.

"Automation separates the good businesses from the great businesses," Keap CEO Clate Mask said. "The more you automate your business, the more efficiency you have in your business. And when you apply automation to your sales and marketing process, not only do you get more profit, but you get more leads, more customers, more repeat customers. Simply stated, when you apply automation to your sales and marketing, you save time, grow sales, and increase profits."

[Marketing automation](#) can be incredibly impactful for a small business. It can help score and nurture leads throughout the sales cycle, and boost conversions by targeting customers with the highest purchasing potential. It can also set up tedious manual processes to run on autopilot, if you will, while the business owner and staff members pay attention to more pressing issues.

From Keap.com, here are 3 ways marketing automation strategies can be used in small businesses:

1. Builds relationships

New customers rarely purchase from a business the first time they learn about it, which is why marketing automation, like personalized emails, is important to building and fostering that relationship. By helping your audience learn more about your products and mission through regular, thoughtful sends, you will be able to encourage and increase conversion rates.

2. Helps you follow up on potential sales:

Follow-up emails sent to customers who browse your website, abandon their cart, or even write in with a customer service question can help complete the potential transaction. Other marketing automation features, like follow-up reminders, can keep your sales team on top of the most qualified leads.

3. Tracks the customer journey:

The more you know about your customer, the better. With marketing automation, you will be able to track the customer journey and see, on average, how long it takes a customer to make a transaction, what information they need to complete that purchase, and what marketing assets are leading to the highest conversion.

Beyond the scope of sales and marketing, automation also can be implemented to manage office administration for small businesses.

According to a survey from The Alternative Board, a membership organization for business owners, [entrepreneurs spend 68% of their time](#) managing daily to-dos. That's not high-level efficiency in a fast-paced business world. The smart small businesses recognize this and have automated many daily office tasks, relying on software such as Keap.

"If you're considering whether your office could be more efficient, think of any task you or your employees do over and over," Amy Saunders writes in Keap.com's [small business office automation guide](#). "Maybe it's re-typing an email you already sent four times this week, asking a vendor to sign a contract, or reminding a client about tomorrow's appointment. Even if each task takes only a few minutes, those minutes might add up to hours by the end of the week. If you repeat the process more than a few times, it's worth automating."

She concludes: "Automating tedious tasks frees up valuable time and resources—allowing you and your team to spend more time working on the business instead of in the business."

Here are just a few administration areas being automated by successful business offices as we approach 2020:

- Routine communication
- Data entry, billing
- Basic paperwork
- Appointment scheduling
- Employee hiring and training

Chapter 4: Marketing automation tools

Marketing automation involves using technology to manage and simplify marketing tasks, helping businesses to score, sort, and nurture leads throughout the sales cycle.

The right marketing automation solution can also help a small business enhance its overall organization and save time. Regarding the latter, 75% of respondents to an [Adestra survey](#) said that [saving time was the biggest benefit of marketing automation tools](#). An even bigger group—4 in 5—said they had [increased leads](#), with most also seeing a rise in conversions.

So, what's an example of the right marketing automation solution?

[Let's check in with USA Today small business columnist Steve Strauss:](#)

“One of my favorites is made by [Keap](#),” Strauss wrote in a recent column. “This all-in-1 tool helps small businesses all along the sales cycle: from marketing and acquiring new leads to tracking those leads to managing staff to invoicing clients. What's even better about the Keap CRM (Customer Relationship Management) is that it automates the entire sales process, freeing you up to do other things. The software automatically handles follow-up, updates client records, and gets you paid.”

Keap, founded in 2001 and formerly known as Infusionsoft, recently revealed a new product lineup of CRM and marketing automation software built for small businesses: Keap Grow, Keap Pro and Infusionsoft by Keap.

Keap's products are providing critical help to the company's 250,000 users scattered around the professional services industry from business consultants and interior designers to accountants, lawyers and health and fitness coaches.

“In small business, responsiveness often determines if you win and keep clients,” Keap CEO Clate Mask said. “It's the everyday

chaos of growing a small business that gets in the way of delivering consistently great service. If leads don't get contacted immediately, or appointments take weeks to get scheduled, clients move onto the next small business. That's why 44 percent of clients cited 'poor follow up' as the reason why they chose not to hire a small business. With Keap Grow and Keap Pro joining Infusionsoft in the product family, we are now bringing the benefits of automation to small businesses at all stages of growth."

Let's take a closer look at Keap's new product line:

Keap Grow

The simplest product in the lineup, Keap Grow offers an easy way for small businesses to manage sales and impress clients in one place. It includes all the most essential tools for managing clientele and winning more business, including CRM, appointments, phone, text and email messages, quotes, invoices and payments, tasks and reminders and nudges, simple reminders when it's time to follow up with a lead or client.

Keap Pro

This product delivers a complete sales and marketing toolkit that small businesses can customize to win more business and save time. It includes all the tools that are part of Keap Grow, plus Campaign Builder for sales and marketing automation, visual sales pipeline and lead tracking, Smart Forms and recurring billing and user roles for multi-users.

Infusionsoft by Keap

Infusionsoft is the most robust, centralized CRM, sales and marketing automation platform for small businesses. It includes Campaign Builder for sales and marketing automation, full CRM with a sales pipeline, lead scoring and advanced capabilities like reporting, integrations, ecommerce, and more.

Chapter 5: Automation tips

Entrepreneurs consistently discover that there are many different aspects of their small business that can be automated, and the smart ones quickly take action. As this happens, their business evolves with the times.

Consider these basic tips for business automation:

Embrace technology

Computers are here to stay and they typically, with a few exceptions, produce at a higher level than humans. Invest money in some of the latest small business technology and software, and invest time on the front end to set it up to best serve the company. Perhaps even hire a technical consultant at the beginning of the automation process.

Track time spent on tasks

Set up a time-tracking system for a day (or a week or a month) to learn how much time is being spent on every task a small business needs to complete to keep business functioning. When the period expires, examine the time-tracking data to learn which task (or tasks) require the most hours and energy. That task (or tasks) should be automated immediately.

Reduce the number of processes

Entrepreneurs should carefully examine how they operate their small business, keeping in mind there are likely processes in place that they can eliminate. Or, perhaps several processes can be streamlined into 1. Enter automation!

Secure employee buy-in

Some small business owners fail to recognize that while making a process change is relatively easy to do, helping staff members understand and accept the automation can be delicate and/or challenging. Remember, most people are afraid of what they don't understand. So, a business owner should make certain to bring the staff along for the automation ride, step-by-step.

Lack of communication breeds fear of the unknown and often resentment. Thus, letting employees know why a business is automating—and how it will benefit not just the company but the employees, too—is a must.

Chapter 6: Automation best practices

While turning to automation may seem like a no-brainer for a small business owner, it's critical to thoroughly think things through. Ask why and ask how; jumping in without proper planning can prove costly.

Not long ago, the Forbes Technology Council published more than a dozen insightful must-dos for businesses that choose to implement automation.

Among the suggested best practices:

1. Start off simple

“Automation is a bit like digging a tunnel: You don't know what you're going to run into. It's best to begin with something useful but simple. You'll avoid wasted time and resources but learn a lot about your organization and infrastructure. Carry those lessons forward, taking an incremental approach, and you'll maximize your productivity gains while preparing yourself for bigger projects.” - Matthew Russell, Digital Reasoning

2. Write down your processes

“Before you automate your workflow, you should document all of your processes and go through them with a fine-tooth comb. In this step, you're looking for edge cases -- problems that occur when something operates at an extreme parameter and will derail your systems when you automate.” - Pin Chen, ONTRAPORT

3. Calculate the ROI

“Automation isn’t always easy. Make sure to estimate the time/cost savings that automating a process will give and compare to the time/cost it will take to automate that process. If you invest the time/money now, is the amount of time it takes to recoup that investment acceptable? Make sure to prioritize automating the processes that will save the most time and have the biggest ROI.” - Matthew Kolb, AnyplaceAmerica.com

4. Consider the security risks

“What is automated and digitized can be hacked. Automation makes tasks one click easier and a thousand times faster for you—it also does the same for the malicious attacker. Be mindful of security and plan accordingly.” - Satyam Tyagi, Certes Networks

5. Think long-term

“When automating, consider what will make the most sense in the long run. Make sure that whatever solution you employ has the flexibility to grow and adapt to future changes in your development process. The worst thing is becoming dependent on a solution you have limited or no control over -- an issue many cloud-based systems and third-party apps are known for.” - Chris Kirby, Voices.com

A major automation trend worth noting involves the online chatbot, which more and more businesses are using for customer support to save time and effort.

Small businesses, in particular, have embraced chatbots en masse. In fact, per smallbizgenius.net, [nearly 40% of companies](#) that have between 1 and 10 employees use chatbots, making them the most-frequent users.

A chatbot is a computer program that simulates human conversation through voice commands or text chats or both. And keep in mind, a chatbot can do much more than simply respond to customers’ inquiries. It can also collect valuable data about users.

Here are more chatbot stats (from smallbizgenius.net):

- Chatbots can cut operational costs by up to 30%
- 85% of customer interaction will be handled without human agents by 2025

- 50% of businesses plan to spend more on chatbots than on mobile apps
- 64% of internet users say 24-hour service is the best feature of chatbots
- 37% of people use a customer service bot to get a quick answer in an emergency

Chatbots exploded onto the scene not too long ago and, as mentioned above, have become 1 of the most useful and popular business automation tools. Industry research indicates multiple demographics enjoy using them—from baby boomers to millennials. Because of this universal love, look for chatbots to continue to thrive in 2020 and beyond.

Chapter 7: Automation + CRM

Automation and Customer Relationship Management (CRM) software, such as the aforementioned Keap, go hand in hand. And CRM, which has been around for more than 20 years, is thriving now more than ever. The reason for this lies in how consumers use technology to interact with businesses in today's world.

CRM provides a powerful method for connecting data from sales leads and clients into a single tool or hub, if you will, and is a must-have for businesses that want to improve relationships with contacts.

CRM and automation functions will vary. For example, a smaller company that is operating minus a fully-staffed sales team may use CRM to automate the sales process. A larger company, however, may opt to utilize CRM to build complex email nurture campaigns to convert leads.

Clearly, it's a versatile tool. But regardless of how a company chooses to use CRM, there are [4 standard CRM functions—as outlined at Keap.com](#):

1. **Capturing leads:** CRM software stores all information about a potential customer, or lead, in 1 place. You can add this information automatically, when site visitors fill out a form for example, or manually, if sales reps want to add names to the database.
2. **Tracking the [sales pipeline](#):** Once you capture all of your leads, your CRM can then track opportunities as they move from stage to stage based on specific actions. This increases visibility and reporting, allowing sales reps to accurately forecast accounts, see how close he or she is to hitting quota, and prioritize leads who are more likely to become paying customers.
3. **Streamlining customer contacts:** You may be wrangling spreadsheets, lists, and pie charts in an attempt to capture the diverse activities related to managing customers. It can be difficult, if not impossible, to connect different sources of

information to tell a cohesive story. CRM makes it possible to organize contact information, communication, customer service, sales and revenue for tracking, reporting, and analysis all in a single system.

4. **Delivering and sharing information:** With such powerful data and reporting consolidated in a single resource, delivering information when and where it's needed becomes much easier. Collecting all this information in your CRM calls for an organized team with a consistent process. Establishing this process and encouraging transparency between process owners will foster information sharing. When a single area of your business process improves, other areas do too.

Here's a very helpful secret about using CRM: Just because a CRM can accomplish many things, it doesn't mean a business must utilize it in a way that taps into all of its capabilities. Instead, a small business can opt to develop a simple CRM strategy based on basic communication needs, and use CRM to accomplish it most effectively.

Other [CRM secrets, as explained at Keap.com](#):

Customization

As you identify areas of improvement needed in your CRM, you'll need to be responsive and adaptive. Your CRM should be flexible to adjust as your customer base grows and adapt based on your unique customer trends and behaviors.

Integration

Integration with Outlook, MS Office and other platforms like practice management systems is key. Make sure your CRM is compatible with both current systems and those you'll need as your business grows and matures.

Planning and strategy

Launching CRM in your business is a valuable decision to grow. Be sure to invest time in planning for CRM. Develop a clear strategy to begin well. Engage employees through communication about the importance of CRM and devote time to train the team to use your CRM tools effectively.

Chapter 8: How a small business can get started with automation

As mentioned in Chapter 6, starting small is the key to success for a business undertaking automation.

“Notice 1 thing, 1 process, 1 task or 1 email that you do over and over and over,” Keap CEO Clate Mask said. “Stop wasting time on this mundane, repetitive task. Put a computer to work for you and automate it!”

That’s good advice. A small business considering automation should not (insert another throat clear) “byte” off more than it can chew. The most common automation blueprint features implementing 1 basic process, tracking its results, refining its workflow for better performance and then moving forward with additional automation.

If you’re a small business owner contemplating automation, also consider:

- Asking automation vendors for case studies or references so you can get a feel for what other small businesses are automating
- Creating a team of “thinkers” from different departments of your company to strategize automation implementation and, later, to brainstorm and critique additional automation solutions

Once a small business decides it’s ready to automate, there are so many places to begin. Again, go slow. Take baby steps. Perhaps start with something as basic as creating a FAQ page for the company website. It’s an oldie but a goodie—and a primitive form of automation. Think of how much time a business owner and/or employees can save by directing customers and potential customers to this page instead of answering the same questions over and over each business day.

Too basic? Well, then check out the Keap.com guide “[25 Things Every Small Business Should Automate](#)” for more advanced automation ideas within the realms of leads, sales, ecommerce, customer service, events and office management.

Still not flashy enough? OK, then check out some out-of-the-box automation suggestions within the Keap.com blog entitled, “[6 Weird Ways for You to Use Automation You Probably Never Considered.](#)”

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