10 Things Every Small Business Should Automate

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Get more done in less time by automating these common small business tasks

As your small business grows, you and your team become more crunched for time. There are never enough hours in the day. You probably wish you could clone yourself in order to get everything done.

Keap doesn't offer cloning, but we can give you the next best thing: Sales and marketing automation.

[Automation](#) is no longer a "nice to have." It's essential to sustainable growth. Your savvy competitors are doing it.

Why?

Because automating sales, marketing and administrative tasks **saves 10 hours per week or more**, according to Keap's customer surveys.

The list of things you can automate is almost endless, but we've curated a list of 10 things to automate right away — often in just a few minutes. This is the low-hanging fruit of automation.

Start with these essential automations, see how much time you save, and you'll start to wonder, "What else can I automate?"

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01

Follow up immediately with a new lead or customer

Do any of these sound familiar?

- You're overwhelmed just trying to keep up with your inbox

- Leads and customer inquiries are slipping through the cracks

- You and your team have to choose between getting to everyone vs. responding to the special cases that take more time

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

When a prospect completes the form by entering their name, email address and comments, the automation software will send 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 reaching out. Someone from our team will be
in touch shortly.
```

Your potential customers will know their note didn't disappear into an online black hole. Meanwhile, the software assigns a staff member to follow up with a phone call.

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If your contact form includes an option to select what they're contacting you about, you can personalize the email even more. Here's an example:

Hi, [First Name]!

I got your request to schedule an appointment with us. Here's my booking link: [insert your link — **it's included with Keap!**]

Simply select a time that works for you. I look forward to talking with you!

This quick little automation can do wonders for your lead conversion rate, and requires very little setup time.

You can employ the exact same type of automation for new or existing customers.

Here are more ways you can automate follow-up through your entire **customer lifecycle**:

- Right after a sales call is completed, have a follow-up email go out automatically thanking them for their time and providing next steps. This will save your sales team so much time!

- When a purchase is made, have it trigger an email series welcoming your new customer and giving them more information about your company — and other products or services that might interest them.

- Nurture leads and customers with helpful information like a how-to video, latest trends, quick tips, etc.

- Check in, ask how things are going and request a testimonial. If the customer is dissatisfied, automatically notify a team member to follow up right away.

Not sure what to write in your follow-up emails? No problem! We have many **professionally written templates** you can download and customize for your business.

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02

Automate social media interactions

Social media platforms provide a great way to stay in front of customers without bombarding them with emails, and to target different demographics. If you're using social media for your marketing efforts, you can use automation to beef up your followers.

Send customers an automated invitation to check out one of your social profiles:

```
Hi, [First Name]!

Did you know we post how-to videos on TikTok every week? Click
here to see what you're missing.

P.S. If you're not on social media and don't plan to be, click
here to let me know not to send you these types of emails. Or,
reply and let me know where you hang out online.
```

When a customer clicks the link, your software's work is done. You can't guarantee they'll decide to follow you, but at least you've made them aware that your profile exists.

You can also use automation to promote Facebook events. 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.

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Drive more traffic to the event page by sending automated emails to your contacts. Make it personal:
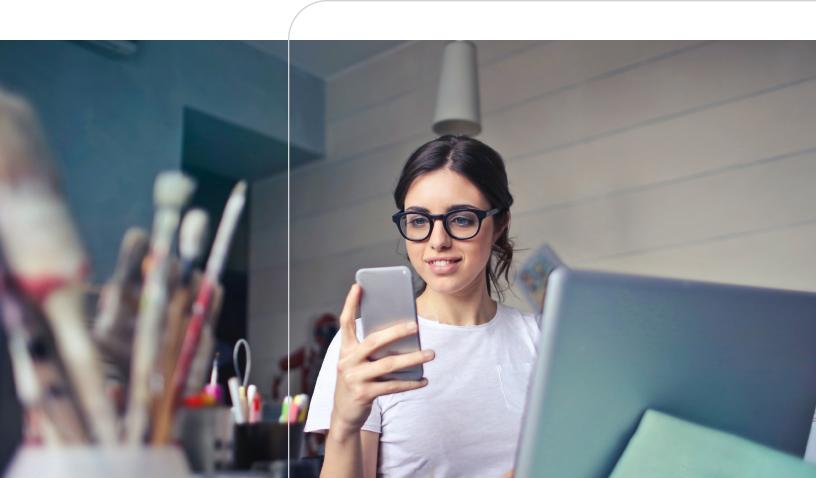
Hi [First Name],

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

Click here to RSVP.

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

Appointment scheduling and reminders

Don't underestimate the power this simple automation can bring to your sales pipeline.

People are busy, which means they can easily forget that sales appointment, or forget to schedule the appointment in the first place. You and your team don't have time to play personal assistant, sending a flurry of back-and-forth messages to schedule, reschedule and remind prospects about appointments.

With Keap's appointment scheduling feature, you can send prospects and customers a link to your available appointment openings so they can easily book a time that works for them. No more back and forth.

Keap can easily sync with your Google or Outlook calendar. You can set up multiple appointment types, such as a 30-minute consulting call for prospects and a one-hour meeting for new customers.

You can also automate appointment reminders at helpful times like the day before and 15 minutes before the appointment. Include the link to reschedule in case they can't make it at the last minute. If they cancel, have the automation create a task for you to follow up with them later.

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Gauge satisfaction and ask for referrals

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. The customer loves your product or service? To replicate your success, find out why the product resonated with them.

Using automation, email a survey link to customers who recently made a purchase. The survey can be as simple as one question and three multiple-choice answers:

How satisfied were you with your recent purchase?

Satisfied — Neutral — Not satisfied

Automate your follow-up accordingly. Set up the software so:

- A negative response triggers a task to contact the customer via phone or email. Reaching out quickly can prevent further damage, especially if your team is able to address the customer's concern.

- A positive response triggers an automated email to thank your customer and ask if they'd be willing to give you a testimonial or online review.

You can also use automation to **ask for a referral.** To encourage the customer to take action, you might offer a small gift or coupon as a token of your appreciation.

When a customer enters a friend's name and phone number into a web form, your software will create a task for you or a team 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 email providers like Google and Apple. Pick up the phone, tell them who referred them, then ask about opting into your emails.

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Stay engaged automatically

One of the most difficult things to do as a small business owner is to simply stay in front of customers and sales prospects. Fortunately, this is one of the easiest things to automate.

You wouldn't propose marriage on a first date, right? The same logic applies to a new prospect. 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.

Here are some ways to automate your follow-up in a way that nurtures relationships:

- **Short-term nurture.** It can take between 7-12 touch points before a person buys, and the first company to respond gets a head start. By automating immediate follow-up in the first days and weeks, you can communicate the value you have to offer quickly, yet in bite-sized pieces.

- **Long-term nurture**. 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. Send resources that educate them about your business and address common questions they might have. Include options for increasing or decreasing the frequency of the communications. Always include a "contact us" link they can click when they want to talk to a sales rep. With automation, that click triggers a task for you to contact them.

- **Customer follow-ups.** A few weeks or months after your work with a customer is complete, send an email (automated, of course) checking in to see how things are going. You can offer a discount on their next purchase, and send your booking link in case they want to talk more about their current needs.

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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. **Lead scoring,** available with Keap Max, shows you which leads are hottest right now.

One of the most delightful ways to stay engaged is to remember birthdays. 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 customer to a web form. They enter their birthday, which the software adds to the customer's information in the customer 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]!

All of us at [your company name] hope you have a wonderful day.
Here's 15% off to celebrate.
```

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

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Remind customer about an abandoned shopping cart

Somebody who visits your shopping cart was there for a reason. You can use automation to remind them to return.

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 their order. And then...no sale.

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.

07

Follow up with networking connections

You know what's impressive to people? Actually following up when you say you're going to.

At a conference or event, 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? With the free Keap app, you can scan business cards using your smartphone's camera and upload the contact information directly into Keap. Then, trigger the automated email right from your smartphone with one easy click.

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Generate repeat business

Your best sales prospects are existing customers. For most businesses, sales shouldn't be 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.

Don't wait for customers to realize they need to restock/renew and slowly get 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:

Hi, [First Name]!

We noticed your supply is likely 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.

The software will track which customers click that link to buy, so you know how impactful order reminders are.

Pro tip: If you have a recurring service, set up automation that checks if a customer's credit card is expired and automatically prompts them to update their payment information before their next billing date. That way you can reduce the need for manual follow-up when a card is declined.

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Clean up your email list

"The more, the merrier" doesn't apply to email lists. All subscribers initially say they want your emails, but over time, some change their minds and stop reading them. Continuing to email unengaged contacts can stop you from reaching the people who want to hear from you.

That's because email providers like Gmail constantly 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 — contacts who haven't engaged with your content in 3-6 months. Keap's software actually does this for you automatically, marketing contacts as "unengaged marketable" (and eventually, if they still don't engage, as "unmarketable.")

Once the low-engagement crowd has been identified, schedule a series of three automated emails asking if they're still interested in hearing from you. Here's the basic outline:

- Use arresting subject lines like, "Hey!" or "Is this goodbye?"

- In the body of the email itself, ask, "Do you want to keep receiving my emails?"

- Give 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.

In addition to avoiding the spam box, **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 customers' needs and interests, helping you craft more precise messages.

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10

Office management tasks

Automation can't (and shouldn't) replace every task performed by people. But it can take over the repetitive tasks surrounding tasks requiring the human touch, and automatically remind your team members when they need to take action.

Here are a few examples of this:

Sending a handwritten thank-you note to every new customer
- When your CRM identifies a new customer, it can create a task reminder to write the note, including the customer's address from the contact information stored in the system so you don't have to look it up.
- The assigned team member writes the note, marks the task complete, and changes the tag.

Collecting W-9 tax forms
- When you hire a freelancer, add them to your CMS and tag them as a contractor
- Send an automated email asking for the W-9 form to be completed and returned to you. Include a link to download the form from the IRS 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.
- At the end of the year, run a report to generate a list of contractors to send 1099 forms to.

Processing job applications
- On the webpage where you posted a job description, ask interested candidates to submit their name and contact information via a web form, along with a link to their resume (or LinkedIn profile) and portfolio.
- When the form is completed, the software sends an email asking the applicant to confirm their 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 strengths and work experience.
- When that is received, the software creates a task for you to review the application.

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Ready to get started and save time with automation?

Sign up for a 14-day free trial of Keap.
(No credit card required.)

Click here to start today! →

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