



# The Automation Handbook for Small Businesses and Entrepreneurs

A guide to thinking differently about using automation in your business

**keap**



An aerial photograph of a winding asphalt road that curves through a dense, lush green forest. The entire image is covered with a semi-transparent green overlay. A few small vehicles are visible on the road, and the road's white lane markings are clearly visible against the dark green background of the trees.

# Why we made this guide

**This handbook is here to help small businesses and entrepreneurs, like you, drive greater impact. You are the agents of change that transform the lives of your families, employees, customers, and communities. By automating the repetitive aspects of your business, you can do more of the work you love.**

**You can use this handbook to design your customer journey with intention by collecting and organizing leads, educating and converting clients, and creating loyal customers that are excited to send you new business – all with the help of automation.**

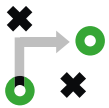
**Keep going. Keep serving. Keep growing.**



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# 01

# Planning

**How you think about automation is one of the most important factors for determining your success in growing your business. In this section we'll discuss automation theory, and address some common misconceptions.**



# Automation theory + myths and misconceptions



## Automation isn't only for big businesses

If you're just getting started it might be tempting to think of automation as something that you aren't ready for, or that you'll start using once you hit a certain milestone in your business growth.

But automation isn't something you have to earn your way into. It's not the reward for slogging through years of manual effort. The reality is that it's not only easier to adopt automation when your business is smaller, but by putting those automated systems in place it can actually help you hit that next milestone years earlier than you otherwise might have. Automation pays a dividend that compounds over time - the earlier you set it up, the longer you will have to benefit from it.



## Automation isn't impersonal

Another marketing automation myth, the one that prevents too many from using it is the notion that automation has to come at the expense of the customer experience. We've all felt the cold and robotic nature of bad automation (think about every automated phone tree ever). But automation is only cold and robotic when it's done poorly.

With relevant segmentation and an authentic voice in your content, automation is more dependable, more scalable, and delivers immediate value to your prospects and customers. It's a win-win.

**Automation isn't just for marketing**

If you've heard the term "marketing automation" then you probably know it's most commonly associated with capturing new leads, and guiding those leads toward making a purchase. And this is certainly a valuable way to use automation - but the marketing portion of the customer journey is only one aspect of the business where automation can be useful.

Too many businesses stop there, and are missing opportunities to use automation in their post-purchase processes, or in their partner communications, or even new employee onboarding.

**Automation doesn't always mean automatic**

Using automation doesn't necessarily preclude manual steps - it might mean you're using automation to ensure that those steps happen, or that they're done a certain way.

Too many businesses rule out automation for an entire process just because one piece of it requires a human touch. You can still use automation before and after the manual step - which will increase the overall efficiency and consistency of the process.

# Lifecycle Automation

Lifecycle Automation (LCA) is about more than just automating your customer experience. It's a mindset and a strategy to grow your business and customer relationship reliably and predictably.

By using LCA, you'll create a cyclical journey that brings in leads, generates sales and creates fans that, in turn, bring in new leads for you.

You'll discover how to find and implement simple solutions that boost efficiency rather than adding more staff — to view the journey from your customer's perspective and create solutions that meet them where they are.

Ultimately, it's here to aid you as you build a business that serves you, freeing you up to better serve your customers, your family and your community.





02

# Strategy

Welcome to the strategy section of the workbook. In the last section, we busted some of the myths about automation and, hopefully, your brain's buzzing with a bunch of ways you could use automation in your business.





# Strategy

Lifecycle Automation is about more than automating your customer lifecycle. Really, it's a set of tools you can use to focus your business and the way customers engage with it.

Having the LCA framework in your business is like building a house with a blueprint, where, before, you were working from what you remember about houses you've visited.



How does the plumbing and wiring work (automation)?

Which walls are supporting the building (business process)?

How to lay out the house so it flows (customer experience)?

You can close your eyes and see what you want your business to look like when it's running — how you want to best serve your customers. You can picture the finished, furnished house.

Those things take expert knowledge and a clear plan.

That's what the LCA strategy is: The blueprint you can use to build your dream business.

In the next few pages, you'll learn about the LCA phases (Collect Leads, Convert Clients, Create Fans). You'll use those phases to identify which improvements will bring you the biggest results.

These exercises are meant to help you prioritize where to spend your time and increase your ROI month-over-month. You might even uncover some areas for improvement you didn't know were there.

**Let's get building!**

# Tell us about your business

These are the performance metrics that we've seen make the biggest difference for small businesses.

Depending on your business, you might not know the exact numbers immediately, and that's okay. Put in your best estimate. This will give you

something that you can work with as you go through this workbook.

If there are other important metrics you track in your business, jot those down. It doesn't have to be all the metrics — just the ones that have the biggest impact on your business.

## Keap Growing

**Name of company:** Keap Growing

**Products:** Custom Plant Installation,  
Green Thumb Membership and  
Green Thumb Text Club  
*Products the company sells.*

### Ways to attract leads:

New Lead Magnet: 5 Tips to Keep Your Plants Alive

|                      |                              |                       |
|----------------------|------------------------------|-----------------------|
| <u>57</u>            | <u>8-12</u>                  | <u>\$100K</u>         |
| <b>Monthly leads</b> | <b>New customers monthly</b> | <b>Annual revenue</b> |

VS

## Your business

**Name of company:** \_\_\_\_\_

**Products:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
*Products the company sells.*

### Ways to attract leads:

|                      |                              |                       |
|----------------------|------------------------------|-----------------------|
| _____                | _____                        | _____                 |
| <b>Monthly leads</b> | <b>New customers monthly</b> | <b>Annual revenue</b> |



More about Keap Growing on page 11.



Keap Growing<sup>🌱</sup>

# Our example business

Keap Growing is a mock business we use to help you better articulate your own business strategies and metrics. You probably don't sell plant installations, but you'll recognize some of the same customer milestones and hopefully get some inspiration for your Lifecycle Automation strategy.

Take a moment to jot down some important moments in your customer journey.



Take a look at an example lead magnet



# 03

# Journey

Let's dive into your customer journey.

The fact is, your customers are experiencing your business with or without your orchestrated input or design.

In this section, you're going to plan out how to ensure they're experiencing the customer journey you intended. You'll build a thoughtful, intentional customer journey that delivers results for your business and your customers.

The ultimate goal of LCA is to help you build a customer journey that makes each customer feel like you're walking alongside them, personally guiding them through each step. That might sound like a big project, because it is.

As you go through this section, keep in mind that your customer journey will evolve as your business does. So don't feel like the first iteration needs to be perfect. Start with what you know today, map out what you can and then build on that momentum.



# Collect leads

## Start your relationship

This is where your customer journey begins — the moment you collect a new lead and start to build trust. This flow is typically the same: You offer something of value in exchange for their contact information, then you make sure to deliver what you promised..



**Pro tip:** The more information you ask for, the more compelling your offer needs to be. Ask yourself: What is the absolute minimum information you need to collect here?

**Can you get away with just their first name and email, then collect other details once they're in your funnel? Give it a try.**

## Brainstorm questions

- What is your main source of leads right now?
- Which leads make the best customers?
- How can you attract more of them?
- Is there a lead generation strategy that your competitors or similar businesses use that you would like to put in place?
- Where does your audience learn or look for new business?
- What insight or expertise can you offer for free?
- What's the most important thing you can do to improve your lead generation?



# Convert clients

## Know, like and trust

Converting clients is where you make the transition from a promising lead to a loyal customer.

To do that effectively, you need to educate your leads about your business and how your offer is uniquely suited to solve their issue. Give them the information they need to be confident in their decision, then close by reinforcing the value so much that it's a no-brainer.



**Pro tip:** People are more likely to buy things their peers recommend to them. Reach out to your best customers and ask for a testimonial, then use those testimonials to convert future clients.

## Brainstorm questions

- What is important for your leads to know before they purchase?
- What can you do to make your offer the easy choice?
- How can you nurture leads until they're ready to buy?
- What's the most important thing you can do to improve your conversion?

# Create fans

## Surprise and delight

Creating fans is arguably the most important stage of your customer journey. Your customers can be some of your biggest assets, because they become repeat customers, offer referrals and share positive reviews.

Deliver on their purchase seamlessly, then look for ways you can go above and beyond. Something as simple as a phone call to first-time customers goes a long way.

Also, look for ways to multiply your existing customers. This could be a loyalty program to encourage repeat purchases, a testimonial request you can use in your funnel or a referral to their friends and peers.

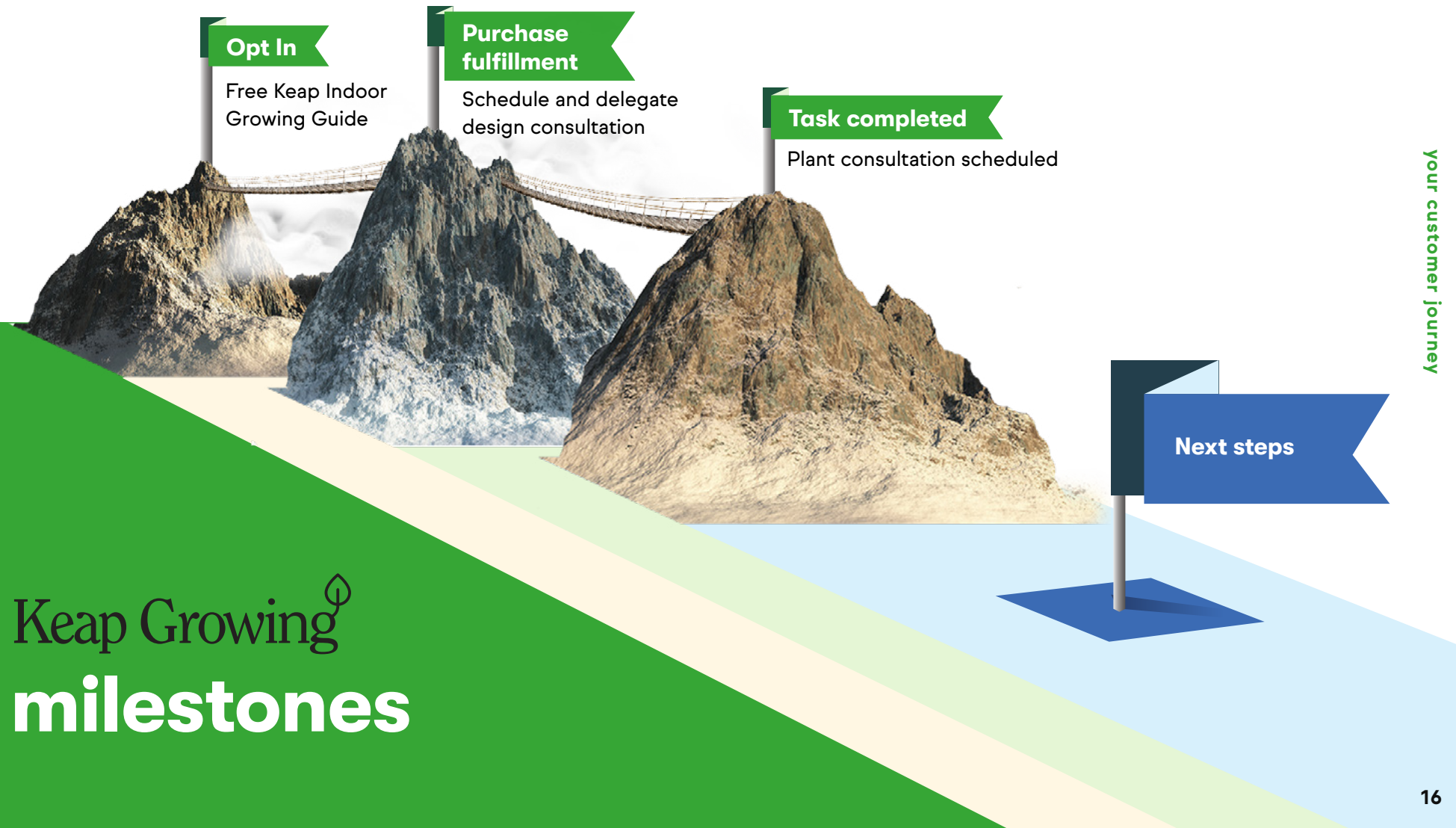


**Pro tip:** Lifetime value is the average dollar amount that a customer spends with you across all their sales, not just the first. You can work this out by taking your total sales and dividing it by the number of customers you have. You should aim to have this average above the price of your main product or offering.

## Brainstorm questions

- What do you get complimented on the most, when do your customers tell you they feel cared for or special?
- What other special moments can you create for your customers?
- How can you make referrals easier?
- Do you have a testimonial collection process?
- Do potential customers see those testimonials?
- What's the most important thing you can do to create more raving fans of your brand?

## Example customer journey



Keap Growing  
milestones



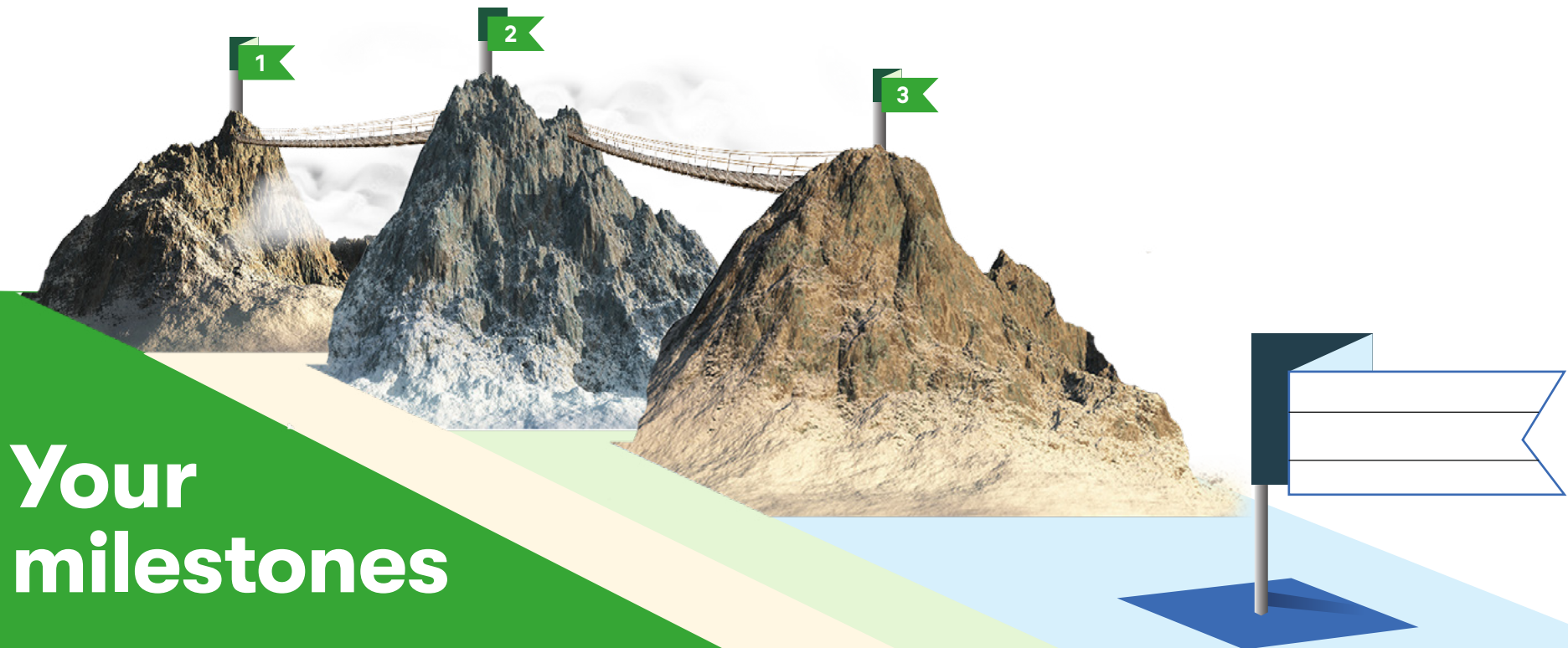
## How are you driving your contacts from milestone to milestone?

**Is it there?** ..... **Is it strategic?** ..... **Can it be automated?**

Do you currently have a process/any customer comms that happen in between these 2 things?

Is it repeatable? Is it driving them towards achieving the next milestone?

Is this an opportunity for a nurture sequence, a sales campaign, text reminders, etc?



your customer journey

# Your milestones

# 04

## Brainstorm



**You've done it. You've made it through the meat of this workbook. Take a moment to reflect on the great work you've done so far.**

**You've identified the milestones that make up your customer journey. You did some deep thinking about how your business is performing in the three stages of LCA. You've done a lot, and you should feel good about it.**

**Next you'll see some case studies with real life examples of how other businesses used LCA to grow and improve their customer journey.**

**Within those examples you'll see that LCA is a versatile framework. It's the strategic foundation we've seen work in thousands of businesses distilled into three phases: Collect Leads, Convert Clients and Create Fans.**

**It's not something you can copy and paste from another business. It's something you use to enhance, improve and deliver the unique thing that YOU do. LCA serves you by giving you back the business you actually want to run.**

**Now let's get you growing.**

**Collect leads case study**

Creating your most compelling lead magnet may be simpler than you think.

Lifecycle Automation is all about getting your leads, prospects, and customers to know what they need to know, to believe what they need to believe, in order to do what they need to do.

This means you want your lead magnets to highlight your expertise so that your potential clients will know that you are knowledgeable, to believe that you are an expert, in order to buy your product or service to solve the problem that they have.

Rather than trying to create a new lead magnet from scratch, Ziva (a small business that uses Keap) took a look at what they already had created, and found a new way to repurpose that into their highest converting opt-in.

**What they did:**

The team was focused on creating more conversions to their flagship online course.

They already had multiple lead magnets in place, but they needed to increase their conversion rate before putting big ad spend behind it, or promoting it across new and upcoming channels like podcasts or Instagram lives.

They knew that when people experienced what meditation could do for them, and had direct exposure to the founder's teaching style, the conversion rate shot through the roof.

The solution? Give the first 3 days of the course for free. This was a low lift from a technical standpoint, and they only had to make a few tweaks to the existing emails, to deliver a slightly different experience and begin selling the full course.

**The results:**

When they launched the preview course, it was converting at close to 35% and kept climbing from there once they started advertising. It is still the best lead magnet they offer.

# Collecting high intent leads

## Convert clients case study



For most companies, converting clients is the journey you create to make a sale. At a university, it is their application process.

Before applying Lifecycle Automation, many applicants struggled to submit their applications.

The process was long and required applicants to meet different milestones, like collecting documents, writing essays and completing tests.

Applicants received one email at the start of the process and one at the end when they submitted this information, but were on their own as they worked through the application steps.

### What they did:

The team started by analyzing previous data to understand any drop-off points. Looking at these numbers revealed something to them: Throughout the application process, there were clear emotional stages for the prospective students, and most dropped off at distinct points.

Once they saw the stages within their buyer's journey, the team could then send automated emails that were specific to what their customer was feeling at the time. They empathized with the applicant and focuses on getting them to the next stage, rather than the end.

### The results:

When the new email journey went live, the entire team held their breath, hoping for results. By the end of the week, their submission numbers were up over 20%. When applications closed, they'd received the most in university history for any given semester.

# Lifecycle Automation in higher ed



### Create fans case study



In Lifecycle Automation, the purchase is in the center of your customer journey. Getting someone to purchase is only half the battle - and really just the beginning of your relationship with your new client.

Quick Business Resolutions, a Keap customer, added automation to connect some stages in their journey to improve their clients' experience from the very first point of contact all the way through the onboarding process.

#### What they did:

Once clients began the onboarding process, they designed a campaign introducing the other services that they offer. They found that clients often didn't know what else QBR could do for them, so they developed a series of case studies highlighting some of their other services that clients may be interested in taking advantage of.

#### The result:

Now that their journey is cohesive and clients are hearing about their offerings through automated sequences, they have time to focus on finding new ways to create a white glove experience. They are also now creating an automated campaign to request referrals from their happiest clients, which will turn right back around into creating new leads, and Lifecycle Automation continues.

# Creating fans with a personal touch

# Keap helps small businesses double their revenue by automating follow up.

Want to see a sneak peek? Check out this 5-minute demo to get a tour of the platform.

Show me

Prefer a more hands on approach? Sign up for the 14-day free-trial. No credit card. No strings.

Sign me up