5 Things Every Health and Wellness Business Should Automate

Build a better client experience and unlock growth with the power of sales and marketing automation

Table of Contents

Automation helps teams do more without working more

How would you like to grow your business, impact the health and wellness of more clients, and reduce stress on your team — without having to work longer hours or hire more people?

What if you could:

- **Respond to leads quickly** and close the sale before your competitors?
- **Follow up with clients** even when you're doing other things?
- **Generate repeat business** by impressing clients with your attention to detail?
- **Get reviews and referrals** without having to remember to ask?
- **Eliminate repetitive tasks** so you can spend more time on strategy, service and meeting your growth goals?

In other words, what if your team could do everything they're doing now to be successful, only *better and faster*?

Sales and marketing automation is the key to making these dreams a reality.

Automation isn't impersonal

For health and wellness businesses, making an impact on people's lives is at the heart of what you do. It's what makes being in business meaningful above and beyond the financial rewards.

But when your business model is centered around a service, how do you grow without losing the feeling of connection and authenticity?

The answer is ***intentional automation***. This means using automation to magnify human connection by taking over repetitive processes in a way that feels highly personal to your prospects and clients.

It's how small businesses magnify the power of a small team to achieve a large impact.

In this guide, we'll walk you through the top five most important automations for health and wellness businesses — and how you can set them up so your communications feel more personal, not less.

> [Keap] really allowed me to do so much more without having to hire staff to do it. It gave me the freedom to do more with less expense."
>
> **Peggy Sealfon**

1. Follow up immediately with a new lead

Goal: *Respond to leads quickly and consistently, and move them to the next step in your sales process.*

Do any of these sound familiar?

- Leads and client inquiries are slipping through the cracks
- Your team has to choose between getting to everyone vs. responding to the special cases that take more time
- You're missing out on sales opportunities because there's not enough time to follow up properly

With automation software like Keap, you can respond immediately every time — without having to think about it.

Instead of having "contact us" requests go to an email address for your team, add a "contact us" form to your website that, when filled out, automatically kicks off an email sequence, enters the new lead into your CRM, and puts them in your sales pipeline.

For example, when a lead completes the "contact us" form, the automation software sends an email reply right away, like the one below. The response is a prewritten template, but it can sound like you just fired it off, and can even include instructions for what to do next.

```
Hi [First Name]!

Thanks for reaching out. Someone from our team will be in touch
shortly about your specific question.

In the meantime, here's our most popular resource — a checklist for
crafting a healthy eating plan that can put an end to yo-yo dieting
forever!

Take a look, and if you want to discuss it with one of our nutrition
coaches, schedule a call here.
```

See how you can get people to book calls before you even get back to them? Pretty great, right?

At the very least, your potential clients 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.

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'm Natalie, one of the nutrition coaches here at Health By Design. I received your inquiry about how to select the best diet for your body type.

Start by taking this **Body & Nutrition Assessment**. It's free and only takes five minutes!

Then **schedule a free consultation appointment** with me, and we'll go over your results and start on a customized nutrition plan for your body type and lifestyle.

I look forward to talking with you soon!

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

To take it a step further, create additional emails to automatically go out if the lead doesn't reply to the first one right away.

For example, the second email might look like this:

Hi [First Name],

Just checking to see if you saw the **Body & Nutrition Assessment** I sent in response to your request to learn how to select the best diet for your body type.

It only takes a few minutes to complete, and then we can go over it together. Schedule a call with me **here**. The first call is completely free, so no pressure whatsoever.

If you want to do a little more research on your own before we talk, check out our free guide to **Creating Diets You Love Living With**.

I can't wait to help you find the perfect nutrition plan for your body and lifestyle!

Natalie

If the lead still doesn't respond, you can put them into a long-term relationship nurture sequence, or sign them up for your email newsletter. Here's how you might communicate that to them:

> Hi [First Name],
>
> I'm guessing you're not quite ready to take the **Body & Nutrition Assessment**, and that's totally fine. I'm here for you when you're ready.
>
> In the meantime, I'm going to make sure you get our monthly e-newsletter with healthy nutrition tips. A healthy lifestyle starts with baby steps, so find something that resonates with you and give it a try!

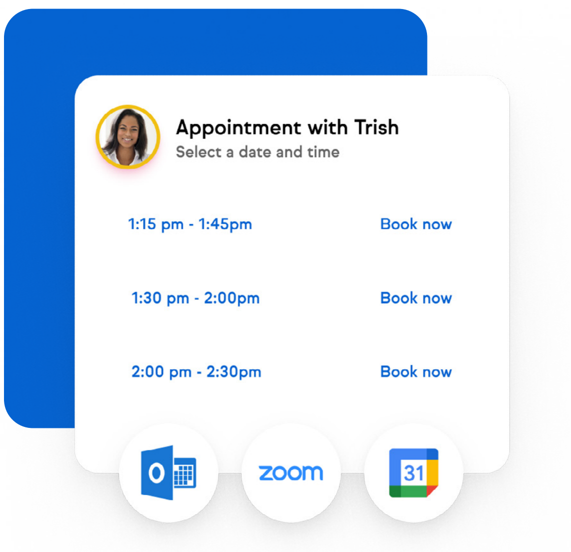
Not sure what to write in your follow-up emails? No problem! We have many **professionally written templates** you can download and customize for your business, and when you're a Keap customer, you also have access to our AI **Content Assistant**.

2. Appointment scheduling and reminders

Goal: *Reclaim the time your team spends scheduling appointments, increase bookings, and reduce no-shows.*

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

People are busy, which means they can easily forget their appointment with you, or forget to schedule it in the first place. Your team members have better things to do than 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 clients 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 complimentary call for prospects and a one-hour meeting for clients.

And if you're already using booking software that you like, Keap can integrate with many third-party calendar tools.

In addition to automating the appointment-setting process, you should also automate reminders. This helps reduce no-shows. It also proactively prompts prospects to reschedule if they can't make it at the last minute — on their own, without having to contact your team.

For example, you can send an appointment reminder the day before the appointment and one hour before the appointment, including the link to reschedule, and any pre-work you want them to do before the call. If they cancel, the automation can create a task for a team member to follow up with them later to find out why, and/or put them into a short-term email nurture sequence.

Keap's appointment software automatically sends reminder emails by default. These can be customized to the unique needs of your business. For your emails, and for our mischievous class clown, an external complaint has farther-reaching implications and higher consequences.

3. Nurture relationships automatically

Goal: *Nurture relationships easily — even when you're doing other things.*

Don't drop your leads just because they don't respond right away! Nurture those relationships until they're ready to buy.

Most business people know this, yet don't follow up as often as they should. Why? Because it's frustrating to reach out to people again and again and not get a response. And it's tedious work sending slight variations of the same email over and over.

So let **automation software** do that for you! This frees up your team's time to work on the people who are responsive, while the automation software nurtures the other folks in the background.

In section 1, we looked at how you can use follow-up automation when someone first becomes a lead. We sent them a link to a free resource and encouraged them to schedule a call. If they do schedule a call, then they move into the appointment automation sequence.

But what if they don't respond to your initial outreach?

Email nurture sequences are perfect for situations when your leads, prospects and clients don't take the next step you want them to. There's no reason to waste those leads by giving up on them — they may be some of your best future clients!

Here are a few examples of how to use email nurture to keep in touch with the folks who aren't quite ready to buy yet:

Lead nurture sequence

If a lead fills out an interest form but then doesn't take action, send them a series of emails over the next few days and weeks sharing free tips and resources. This shows off your expertise and builds your credibility while giving them more time to move forward.

While lead nurturing gives the lead more time, it also ensures that your sales team can focus on the leads who are most prepared to buy. **Lead scoring**, available with Keap Max, shows you which leads are hottest right now.

Prospect nurture sequence

If a prospect takes some steps forward, such as a complimentary coaching call, but doesn't purchase, send them a series of emails that reiterates the value of the offer you made to them, and provides free resources that show your expertise and helpfulness.

Since the prospect has already gotten more information from the complimentary call than what a lead would have, these messages can go into a bit more depth than lead nurture emails, but there may be a lot of overlap between the two. It depends on what makes the most sense for your customer journey.

Client nurture

The most common type of nurture email for existing customers is an email newsletter, monthly report, or the like. Think about what truly useful information you could share that your clients would appreciate. Here are some examples to get your creative juices flowing:

- Latest findings in health and wellness research
- Mobility tip of the month
- Recipes for healthy, flavorful dishes that are easy to make

Birthday email

One of the most delightful ways to keep clients engaged is to remember birthdays. With automation software, remembering birthdays is a piece of cake.

First, you need to 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 enter their birthday, which the software adds to the client’s information in the CRM.

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

Here’s an example of what you might say in the email:

> Happy birthday, [First Name]!
>
> All of us at Nutrition By Design hope you have a wonderful day.
>
> To celebrate you becoming even more of your best self in the year ahead, we’re offering you 15% off any one of our nutrition coaching packages for the next week.
>
> Contact [rep name] at [rep email] for details on how to take advantage of this special offer.

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

4. New client onboarding

Goal: *Impress new clients with how well your business anticipates their needs.*

After a prospect says “yes” to your offer, the sales process ends and the customer fulfillment process begins. Automation can be just as valuable at this stage because it helps ensure a consistent, proactive experience for every client.

Here are some processes you can automate in your client onboarding:

Welcome email

Send an email outlining next steps and sharing key information like client portal link and login information, a link to book coaching appointments, homework assignments, client questionnaires, etc.

You can also automate other emails at key milestones in your fulfillment process.

Client appointment booking

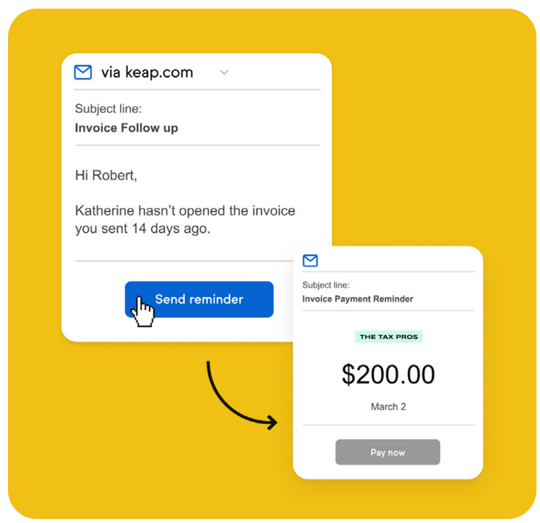
This works similarly to sales booking, except you’ll have a separate booking link for clients with different criteria such as a longer appointment time, different call pre-work, etc.

Invoice (and reminders)

If you didn’t already take payment when they signed up, you can generate an invoice directly from Keap. An email will go out with a link the client can click to pay online.

You can also set up automation to remind clients to pay if their invoice is past due. This relieves your team members from having to play the role of bill collector.

If you have clients on recurring billing, you can also have automation that generates a notification if the payment card is about to expire.



Client questionnaires

If you need clients to provide key information about themselves to get started with you, set up a form on your website. When the client fills it out, the data can be saved to that client’s profile in your client management system.

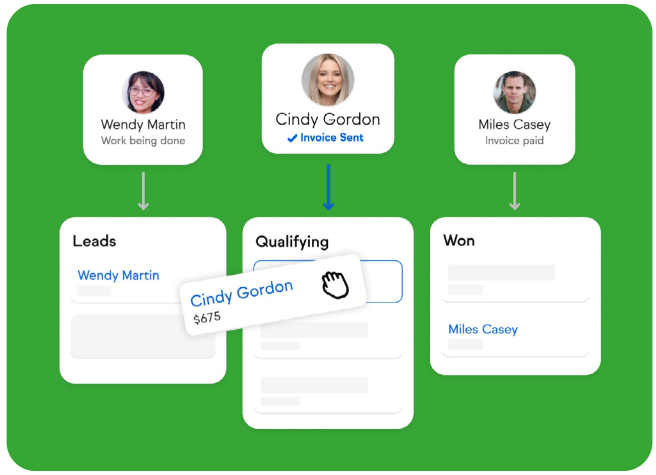
Pipeline for stage visibility

If you want to see at a glance what stage of your process every client is in, set up a pipeline. (You can set up pipelines for the sales process too, and some businesses combine sales, fulfillment, and post-fulfillment into one pipeline.)

For example, Keap's pipeline feature uses a kanban-style interface where you can drag each client's card to the stage it's in. Moving a card from one stage to the next can kick off certain automations.

For example, moving a client from "Consideration" to "New client" can send out the welcome email and invoice.

You can also stop automations when a client changes stages. For example, if you move a client from "Payment pending" to "Invoice paid", it will stop sending them reminders to pay their invoice.



5. Post-fulfillment follow-up

Goals: *Ask your happy clients to refer you, without the awkwardness of asking. Sell more services to your existing clients to increase sales without increasing marketing costs.*

You've successfully completed your coaching program with a client — celebrate!

But there are still a few more automations you need to run.

After all, you've made all this effort to get someone as a lead, nurture them through your sales process, bring them on as a client, and then knock their socks off with your amazing service.

Now it's time to build upon that goodwill to generate constructive feedback, reviews, referrals, repeat sales, and recurring subscriptions. Because the best source of new customers is current customers.

Ask for feedback and reviews

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:

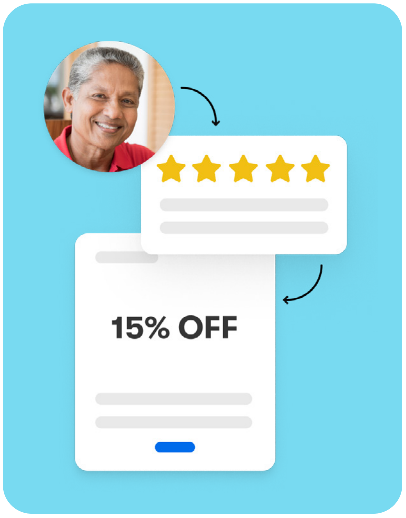
- A negative response triggers a task to contact the customer via phone or email. Reaching out quickly can prevent further damage, especially if your team is able to address the customer's concern.
- A positive response triggers an automated email to thank them and ask if they'd be willing to give you a testimonial or online review.

Ask for referrals

You can also use automation to ask for a referral. To encourage the client 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 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.



Generate recurring revenue and repeat business

Your best sales prospects are existing clients. For most businesses, sales shouldn't be a one-time event. You want a client to buy again — and again and again — especially if you sell a recurring service like an ongoing coaching package.

Don't wait for clients to get around to renewing with you. Be proactive by automating suggestions for the program that would be a good fit for them next.

This is especially important with programs where you've built up momentum with the initial package and want to keep the progress going for the client.

If you don't already have one, think about creating a recurring service like group coaching or a special community that clients pay for monthly. This provides reliable monthly income, and a cost-effective way for clients to stay on track with what you've taught them.

Pro-Tip: If you have a recurring service, set up automation that checks if a client'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.

Putting it all together

SALES FUNNEL AUTOMATION EXAMPLE

Let's look at an example of an entire funnel from start to finish:

A visitor to your website fills out a form on your landing page. **{Lead}**

Lead follow-up email sequence encourages them to schedule a consultation. **{Lead nurture}**

> If they schedule a consultation, send reminders and consultation prep instructions. **{Prospect}**
>
> If they don't schedule, put them into a short-term nurture sequence. **{Extended lead nurture}**

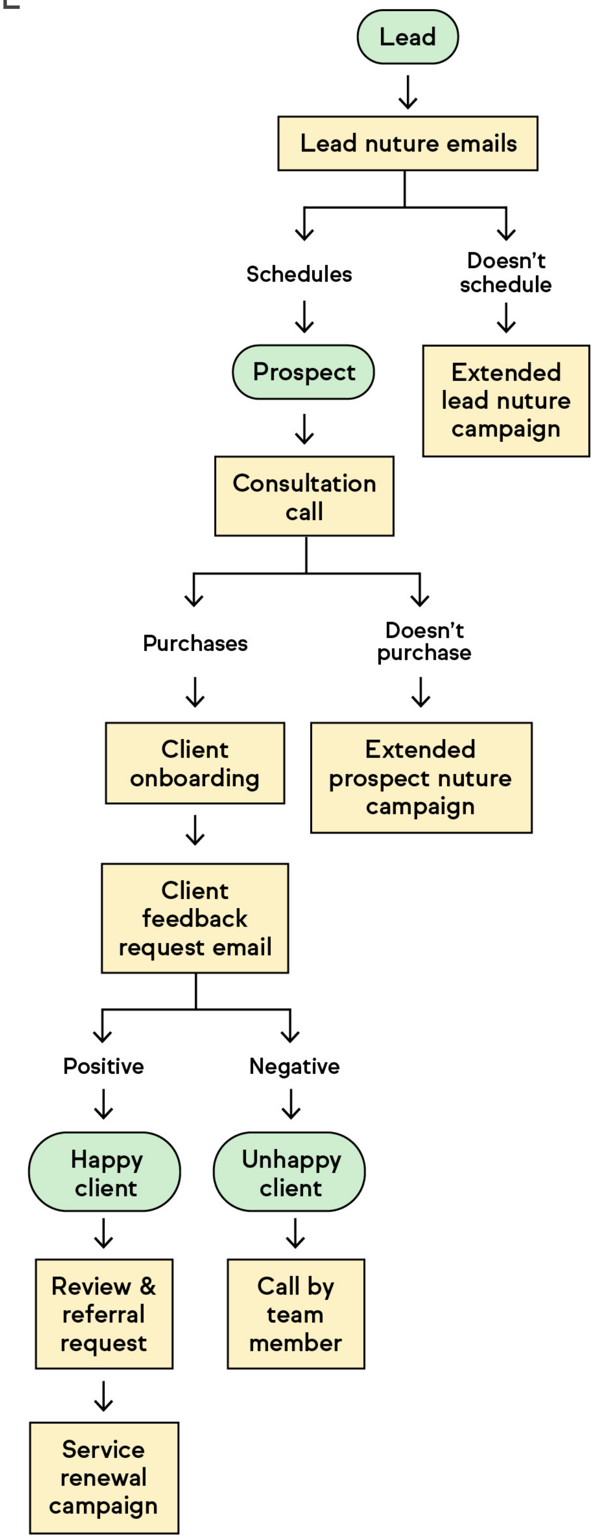
If they purchase a package after their consultation, put them into a client onboarding sequence (including scheduling and invoice reminders). **{Current client}**

If they don't purchase after the consultation, put them into a long-term nurture sequence. **{Extended prospect nurture}**

After a consultation is complete, put them in a sequence that asks for feedback on their experience. **{Client feedback}**

> If their feedback is positive, ask for a review and a referral. **{Happy client}**
>
> If their feedback is negative, assign a task for a team member to reach out to them. **{Unhappy client}**

Put happy clients into a nurture series for a recurring service or a one-time service renewal. **{Happy client renewal}**



Automate your health and wellness business

Grow your revenue and make a bigger impact on people's health and wellness by unlocking the power of Keap's sales and marketing automation in your business.

> Because Keap takes care of all the mundane stuff, I'm able to really focus and engage with the patients."
>
> **Amit Kakar** | Avalon Pharmacy

Watch a demo now or call us at **+1 866-800-0004 x1** to learn more about how it works.