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AUTOMATION CAN HELP YOUR BUSINESS IN A COVID-19 LOCKDOWN

By Lola Media - 31 Aug 2021

As we retreat to our homes, and do business in a different way, it's a new opportunity to look at the systems and processes in your business that need a redo.

- *Are there areas in your business where you can do more delegation?*
- *Are there areas in your business where you can cut costs through a streamlined automation system?*

Ask yourself, is there is something you touch too many times in your business – is it something you can automate?

This article will show you some of the ways you can automate the systems in your business. Please note, this post contains affiliate links. We only recommend products we actually use, have expertise in and love. If you use these links to use our recommended products and services we may earn a commission.

Automating Onboarding New Clients

One of the systems commonly overlooked for automation is your lead generation and onboarding processes – to create a very smooth journey for a lead to become a valued client – while automating the tasks you normally keep handling.

For some, you might just need to automate your online consultations. For others, you can bundle it into a whole onboarding system, which we now use called **Dubsado** (see more below).

Before we get to that, you might just need a simpler solution, such as an online booking system.



If your main call to action on your website or sales pages is for someone to contact you (via a contact form or email address) and then you spend multiple emails or texts (and time) trying to organise a phone call, you might need an online booking system software (to book the call automatically in both your calendars). Most calendars will also now automate and send out a Zoom link so it can be a video call, which means you can talk to anyone, anywhere in the world.

Here's a couple of online calendars you might look at:

- Acuity Scheduling (now owned by Squarespace)
- Calendly

However, if you also have a manual process where you then enter them into your customer management system (CRM), and then manually send a quote, contract and invoice – you might find you can bundle it all into one piece of software.

Last year, I implemented a new automated system in my business called **Dubsado**, which now, when a lead requests a free consultation call, it automatically sets the call up on both our online calendars (which the client sets the date/time according to both our availabilities), *they fill out a pre-qualifying form* (no more tirekickers) to ensure they are the right fit for us, then it puts them into our **Dubsado CRM** system.

After the call is over and the client wants a quote, we send out a quote from the same system (which they are already now in the system). This online quote also includes an option for them to accept it and start the work right away, they can immediately then sign the contract and pay the invoice – all without me having to touch it other than to customise what's in their quote and deliverables (and we have saved templates for that).

It has honestly streamlined our onboarding process so much it's saved me hours of unbillable time and work! I still outsource this job to my VA, as she manages the Dubsado software and all client onboarding and off-boarding, however, my clients still get to deal with me directly and get a custom quote – something usually thought of as quite hard for automation.

If you want to try out **Dubsado**, [you can look at all its features here](#) and you'll get a free and generous 30-day trial. Dubsado is also free forever for your first three clients, so you can test the system, set up all your automation and test it without the pressure of signing up. I recommend however, if it does work for you, that you budget to hire someone familiar with Dubsado as it requires training to use and you are better off delegating this task otherwise you will never get a full 8 hour day to set it up (it will take you longer than that, but an experienced VA can do it in a day or two). *If you already have staff, they have an amazing **Dubsado Education portal and Study Group** which is perfect for learning the system.* Now your staff can spend less time booking meetings and more time on other more profitable (and billable) tasks!

Automating Your Current Clients

Another tool you can use in your lead generation system is an email marketing platform.

Many businesses are ignoring the low hanging fruit of utilising their existing client databases and keeping in closer touch with the people who already know and trust them

[According to Forbes](#), it can cost a business 5 times more to get a new customer, versus retaining an existing one.

You can automate (and scale) this either via a company newsletter or even just setting up an automated nurture sequence or welcome sequence so that when someone first joins your email list, they get a series of automated emails that introduce them to your company and offering some initial



value to them, rather than never hearing from you again until you have a promotion. They are cold by this point, so it's important that you implement a nurture sequence and make an offer at the end of it because leads are 'warmest' when they've first signed up to your list. They are interested in getting to know you better and may possibly already be ready to buy.

We recommend [ActiveCampaign](#) for this reason because it's as affordable as Mailchimp but with better automation and segmentation. It is so easy to tag a client who might be interested in 'x' versus a client who needs more of 'y', then you can [setup an automated email sequence](#) that nurtures each one's interests. You can also bring in new leads through email capture forms (called opt-ins or lead magnets). In fact, part of our branding service helps clients set up lead magnet opt-in on their website, well-designed PDFs, and branded email newsletters, so your new leads can begin to recognise and trust your brand as you land in their inbox. We also create email automations for your new leads so they receive a welcome nurture sequence once they sign up to your list.

We can also send out branded email newsletters for you every month, which we do for our retainer clients. [Here's an example of a newsletter we send out every month](#) for clinical psychologist, [Sarbj Johal](#). He has a short and long version, you can view a [long version here](#).

You might find them an interesting read during lockdown, as Sarb's been helping New Zealanders navigate Covid-19 and lockdowns with his useful advice found on his [website \(which we designed and manage\)](#) and in his new book, [Steady: Keeping Calm in a World Gone Viral](#).

Just for the next few days, ActiveCampaign has given me a special discount for new signups:

- 40% off the **first six months** (or 20% off Annual) for PRO plans or higher
- 30% off the **first six months** (or 15% off Annual) for PLUS plans or higher

[Get in touch with me here](#) if you want more details on their offer.

So hopefully you can see there's lots more your business can be automating – by saving your time, you are saving money and bringing in new clients on an ongoing basis, without more work for yourself!

Get on a free consultation call with us to discuss your automation needs and we will help you get more of your business systemised, so it works for you 24/7!

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