



AUTOMATION DOMINATION

how and why you need to implement automation in your business



:: small business automation strategist :: www.courtneybedore.com



A little about me...

- I've been running my own business for 8 years
- Automation became my focus about 2.5 years ago
- I am a Certified Partner with Infusionsoft
- I run two 7 figure businesses as an OBM
- For my other clients I am strictly their automation expert and strategist



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why you need AUTOMATION

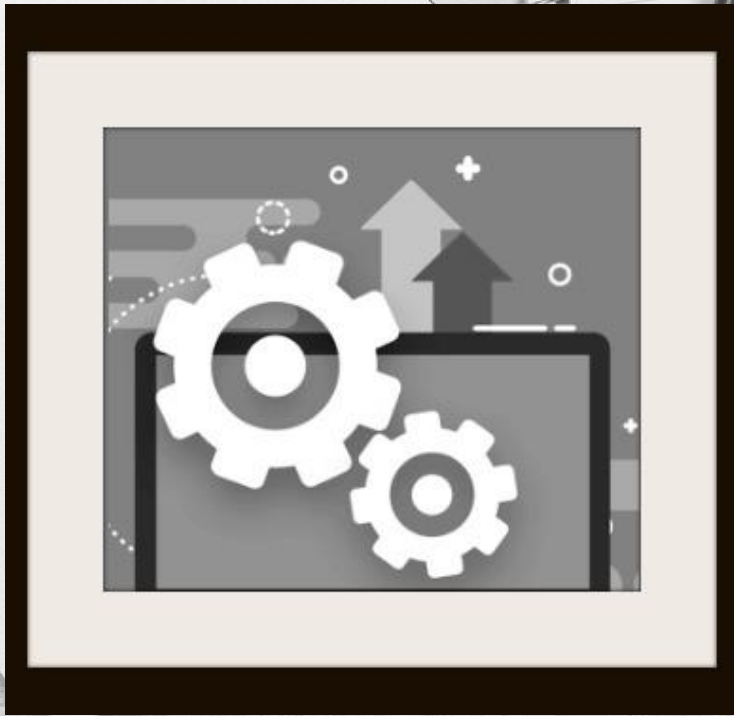
- You should look to automate before you delegate
- Automation is the cheapest most effective employee you can have in your company
- Once you've set it up, it requires little maintenance and the ROI is really high
- Anything that requires you to do LESS should be a priority

things to AUTOMATE

- Email Auto Responders
- Appointments & Call Schedules
- Lead Generation
- List Warming
- Newsletter
- Sales & Marketing Funnels
- Product Fulfilment
- Customer Service
- Behind the Scenes :: Operations
- Engagement & Re-Engagement
- Statistics Overview



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email auto-responders

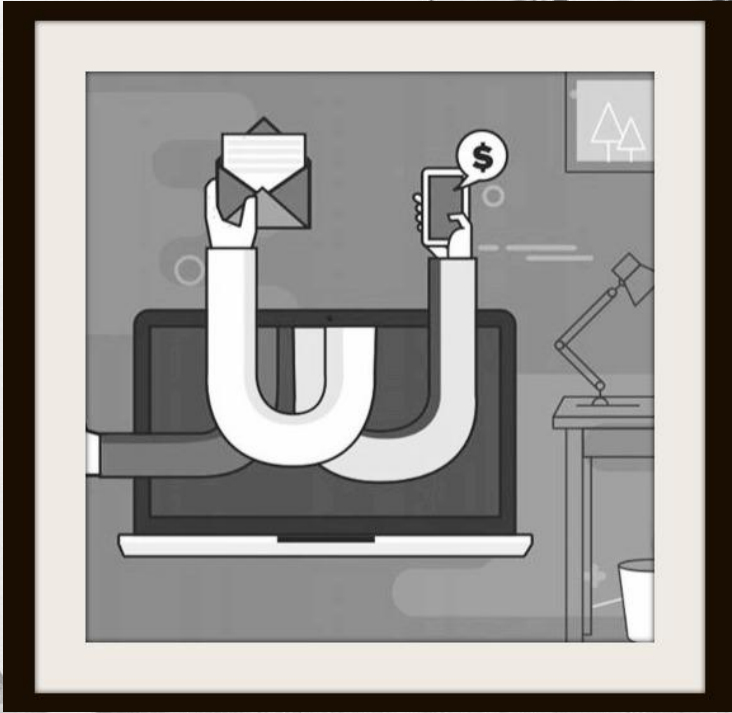
- Give as much detail in the auto-responder as possible
- List FAQ's
- Give expectations on when they will hear from you, or your team
- List how they can find you and connect
- Show the contact person for specific requests for faster service



recommendations & swipe copy

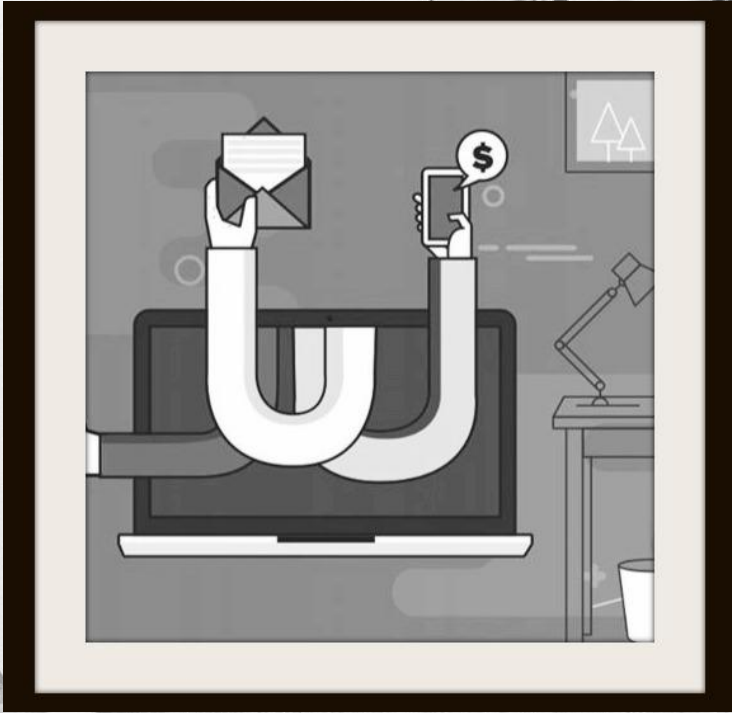
- Helpscout

I have attached a PDF below of the outline I use for my clients, and my own business. This shows what to include and why you should include it.



appointments, calls & scheduling

- Have a link to easily schedule calls
- You can apply tags to navigate contacts through your CRM and sales pipeline
- Apply tags to show history of what calls they have had, and what is still owed
- Send out reminders for the calls, so you don't have no-shows
- Clients and prospects can cancel and reschedule using a link
- Syncs to your calendar automatically
- Effortlessly charge for calls and take payments



recommendations & sample campaign

- Schedule Once
- Infusionsoft
- Google Calendar
- Gmail

I will upload a sample campaign for Schedule Once into your Infusionsoft account, so you can get started automating your account right away.

Just email me courtney@courtneybedore.com.

If you need Infusionsoft, email me as well, and I can get your started.



lead generation

- Always be growing your list and business through various channels
- Collect leads from evergreen social media posts that are automated
- Drive the leads to a marketing funnel, either to warm the contact or to sell to them



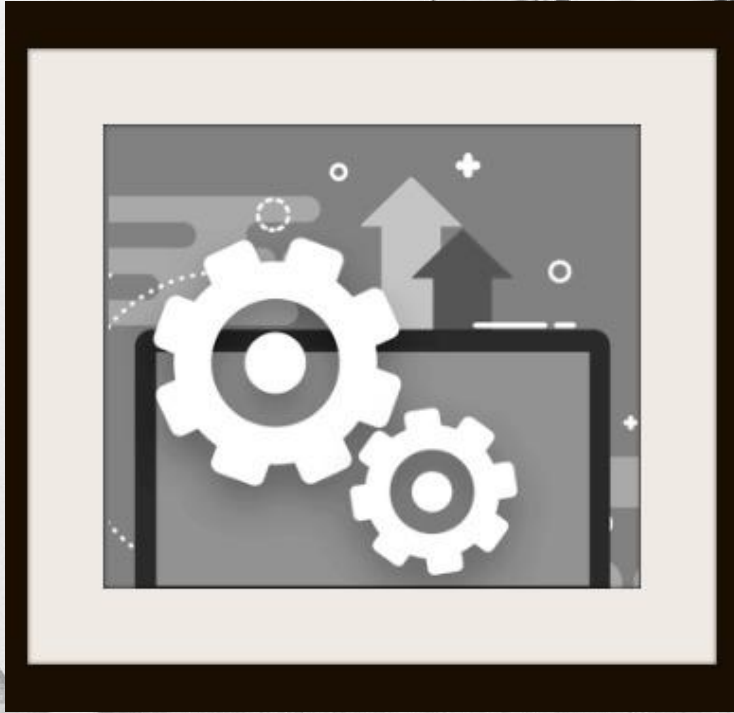
lead generation

- Lead Magnets
- Challenges
- Quizzes
- Surveys
- Free Call
- Community
- Newsletter
- Webinars
- Video Series
- Free Course
- Demo
- Free Trial
- Contest
- Discount



recommendations

- Choose Jarvis
- Meet Edgar
- LeadPages
- Click Funnels
- Infusionsoft
- WebinarJam
- Easy Webinar



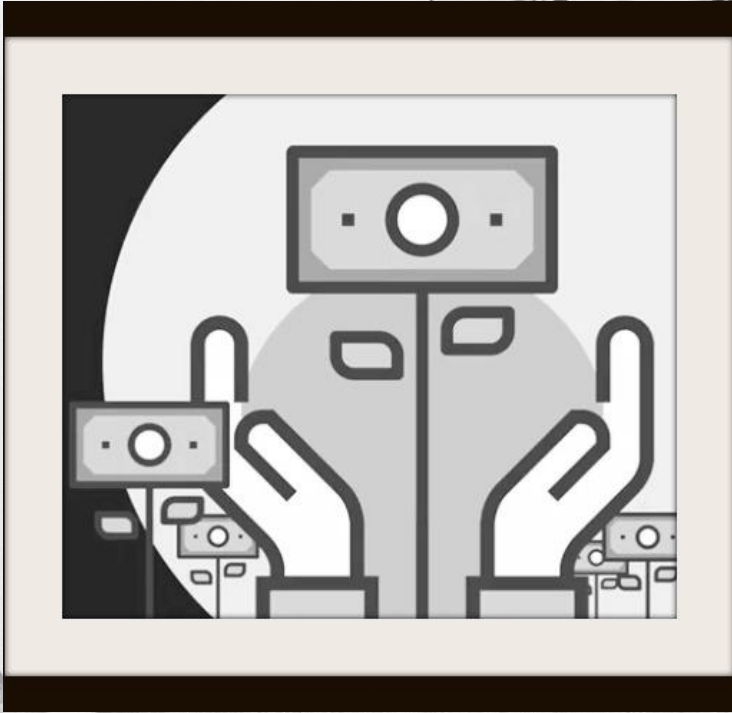
list warming

- Make sure you are sending out sales emails to the right people
- Measure their engagement to make sure that you are pitching at the right time and that your contacts are properly 'warmed up'
- Apply this automation after your lead generation, but before your sales emails



newsletter

- Stay in constant and consistent contact with your tribe
- Send out evergreen content on a weekly basis
- Build the know-like-trust factor automatically
- Use your CRM to measure the engagement of your contacts to keep your list fresh



sales funnels

- Once a lead is considered warm, your system can automatically send them to the pitch sequence
- Send out an abandoned cart email to contacts who have visited your sales page, but have not yet purchased
- Always be selling behind the scenes, even when you are not at your computer



product fulfilment

- Delivers your products to your clients, right after they purchase
- Send access to membership sites, receipts, login credentials and call links right away
- Measure to see if clients open the emails and trigger a follow up if they are not opening
- Follow up on purchases automatically



product fulfilment

- Introduce clients to related upsells
- Increase customer LTV
- Generate alerts to your team for failed payments on memberships and payment plans.



customer service

- Create a dedicated email address for customer service issues
- Have a very specific auto-responder set up to answer all of the normal questions that come in
- Monitor tickets and make sure your team is answering all emails
- Set clear expectations for customer service questions/issues



behind the scenes

- Throughout all automation you can monitor the effectiveness by creating more advanced automation
- Track and measure list engagement
- Automatically segment your list based on clicks in emails
- Make sure you are only send out emails to relevant people on your list
- Keep a healthy, clean and engaged list, with minimal effort



business statistics

- Keep track of measurable statistics at a glance and apply automation triggers to make sure you are hitting your goals
- Send yourself weekly reports so you can keep track of business growth



business automation

If you have any questions on implementing any of the things we have talked about today, please email me:

courtney@courtneybedore.com

I would be happy to help you a little further in getting automation moving in your business.