The Small Business Office Automation Guide

Save time and money by automating administrative work

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In the not-so-distant past, offices had rooms filled with files and staff members dedicated to organizing them.

Employees entered customer information into systems or spreadsheets, one word at a time. They spent much of their days typing e-mail replies, calling customers about appointments, and chasing paperwork to be completed.

Plenty of offices still operate this way. The manual work may partially explain why entrepreneurs say they spend 68 percent of their time managing daily tasks in their business instead of working on their business strategy and goals, according to a survey from The Alternative Board, a membership organization for business owners.

But at the most successful small businesses, employees don’t do these tasks—not manually, anyway.

Instead, they **automate** the office, relying on software like Infusionsoft to manage routine communication, data entry, documents, hiring, and more. When repetitive, tedious tasks are automated, employees have more time to focus on strategy and personal interactions: the kind of work best done by people, not software.

In this e-book, we'll explain how small business owners can save time and money by automating administrative work, including:

- Routine communication
- Administrative tasks like data entry, billing, and paperwork
- Appointment scheduling and follow up
- Employee hiring and training

Routine Communication

“Professional emailer” could practically be a job title. In The Alternative Board’s survey, one-third of entrepreneurs said email was the biggest time strain on their businesses. But while answering email is an inevitable part of every professional’s workday, not every message requires you to write an original response. Here’s how automation can provide a shortcut for the routine emails your office receives.

Respond immediately to customer inquiries

A “contact us” form on your website shouldn’t route customers to an inbox where their email might go unanswered for days. Waiting even **thirty minutes** to make contact decreases your odds of qualifying a lead by twenty-one times, as compared to calling within five minutes, according to the Lead Response Management Study.

With automation software, an email response can be sent as soon as the form is completed (or within any timeframe you decide on). Include a dropdown menu on the form so that the customer can categorize her message as, for example, a new customer inquiry, question, complaint, or request for pricing. You can set up the software to send a response accordingly: While a pricing request could trigger an email with that information, a complaint might send an initial apology email and also prompt you to contact the customer personally to see how you can improve her experience.

Write fewer repetitive emails

Most companies repeatedly send certain emails, like answers to frequently asked questions, pricing information, product instructions, or policies. Instead of taking the time to type a new email—or even to copy-and-paste an old email from your inbox—you can send replies automatically.

Emails can be sent as part of an automated sequence. For example, a customer's newly purchased gym membership could trigger an email that contains the gym's class schedule.

Automated emails can also be sent as a real-time response to an incoming email. Say a customer requests pricing for a new service: If you're an Infusionsoft user, you can **apply a note** to his contact record, which triggers a pre-written email response—while also recording his request in your database.

These automated emails don't have to seem automated, either. By using a few tricks—like **merge fields** that replace "Hi First Name," with "Hi Steve"—the email looks as though you just sat down to write it.

For more email personalization ideas, check out our free e-book, "This Time, It's Personal: 20 tips for sending automated emails without sounding like a robot."

Administrative Tasks

Employees who spend much of their days organizing paperwork and collecting customer information can focus less on tedious tasks and more on important initiatives when administrative tasks are automated. Here are a few ideas.

Collect, organize, and segment customer information

When automation software integrates with your **customer relationship management (CRM) tool**, as Infusionsoft does, you can quickly collect customer information and add it to your database—no paper, scanner, or manual data entry required.

If you collect information by asking contacts to complete a form on your website, the data is automatically uploaded to your contact records. The same is true if you take information by phone and enter it into an internal form in the software. (See page nine for an example of one small business that has streamlined data entry through automation.)

Another perk: By using automation software to collect customer data, you can also automatically segment your customers according to the information they provide. Say you own a music school offering classes in guitar, piano, and percussion. If a customer checks a box indicating that she's interested in guitar, the software will automatically tag her as a guitar player. That way, you can send her the information she wants, without bombarding her with irrelevant offers for piano lessons.

Streamline repetitive tasks

Some tasks are meant to be manual. Say you want to mail an information packet to new leads or call customers every three months to check in. The tasks themselves can't be automated—but the processes leading up to them can be.

Any process your office repeats more than a few times—even something as basic as **collecting coffee orders**—can be built into an automated sequence in which software reminds you to complete the task. A purchase triggers a reminder to write the thank you note, which three months later, triggers a reminder for the check-in call. Your notes, calendar, or memory may fail you at some point—but automation software will help you remember the task every time.

For an in-depth look at segmentation, check out our free e-book, **Take Your CRM Contact List to the Next Level with Segmentation**.

Spend less time chasing paperwork

If your office collects paperwork like tax forms or contracts, you probably spend more time than you'd like tracking down customers who haven't followed through. Fortunately, the paper chase can be automated.

Using automation software, you can apply a tag to a customer from whom you need a document to trigger an automated email containing your request. If the form lives online, software can track whether the customer clicked a link to it—and if he didn't do so after a designated amount of time, it automatically sends another reminder.

If the form needs to be snail mailed back and forth, you can create an automated sequence in which the software tasks you with sending the document. The software can then remind the customer about the form until you tag him as having returned it.

Stay on top of quotes and billing

Quoting a customer on a new product or service can be a multistep process. You might type up a quote, email it to the customer, wait for her to email back to accept, and then repeat the process for an order. If you're an Infusionsoft customer, you can reduce the process to two steps. The quote is automatically emailed to the customer, and if she accepts it, it's turned into an order with the click of a button.

Automation software like Infusionsoft, which includes an **e-commerce platform**, can automatically charge customer credit cards for online orders, subscriptions, and purchases made on a payment plan.

Another benefit of billing automation: You can set an automatic action—like an email to the customer or reminder to call her—to occur when a credit card on file is declined or is about to expire. The software helps you stay on top of failed billing charges so that you can collect payment as soon as possible.

Inside an Automated Office

Why Trusting Connections Nanny Agency no longer needs an office assistant

Rosalind Prather, co-founder

Tucson, Arizona and Southlake, Texas

Only months after automating office processes, Rosalind Prather already can't recall how her nanny agency used to operate.

"I don't know how we survived," she said. "It looked like a lot of paper checklists, lots of paper wasted. It looked like writing the same email over and over and over again. It looked like lots of mistakes being made."

Now, Trusting Connections Nanny Agency uses Infusionsoft to automate nearly all of the administrative tasks involved with both hiring nannies and registering new families. Here's a look at three ways the office has changed since the paperwork days.

1 Family information is automatically imported into contact records

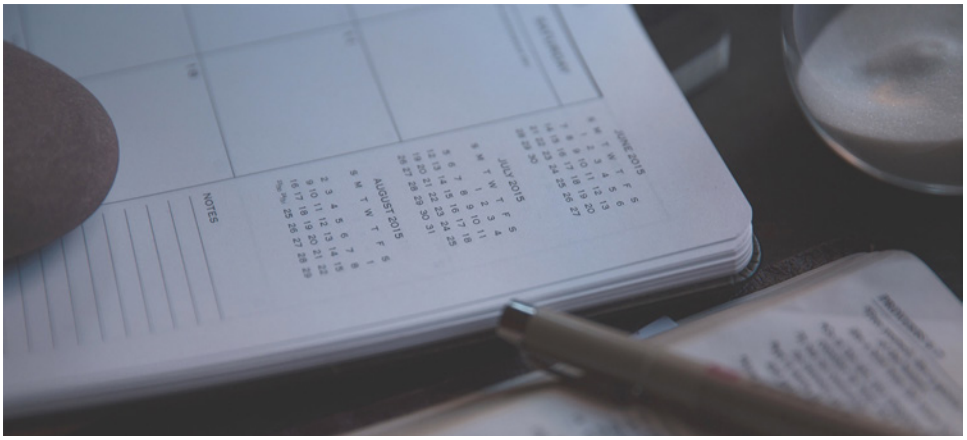
Families looking to hire a nanny are asked to complete a comprehensive registration form on the Trusting Connections website. In addition to covering the basics—household information, children's medical needs, emergency contacts—the form asks parents to describe their parenting approach to topics like nutrition, discipline, and routines.

When the form is completed, the responses are automatically uploaded to Prather's customer database in Infusionsoft. Instead of sifting through notes and forms for family information, she needs to reference only one place. "When I look at a family's contact record," she said, "I have everything I need."

2 Nanny credentials are always up-to-date

A nanny applying to work for the agency also fills out an extensive web form, which includes information about her CPR and first-aid certifications, as well as her car insurance.

Staff members used to struggle with keeping track of expiring documents. Manually sending email reminders to nannies left the company vulnerable to mistakes. "If we have nannies walking around who are not trained and certified, it's a huge liability issue," Prather said. Now, Prather relies on the software to trigger reminders to nannies when the expiration date is approaching.



3 Consultations are scheduled in seconds

Prather calls families to schedule an in-home consultation before matching them with a nanny. She then fills out an internal form in the software that triggers an email about the meeting time and details to both the family and the consulting staff member. The software also routes the consultation to the appropriate staff member, depending on the type of services purchased by the family.

Prather used to spend at least five minutes typing each follow-up email to a family or staff member. With automation, she said, “I went from five minutes down to three seconds.”

Overall, the time saved by automating office tasks has amounted to about twenty hours a week—allowing Prather to reassign her part-time office assistant to more meaningful work.

“We’re able to do what we do, better,” she said. “Before, we were treading water, trying to survive.”

Appointments

Scheduling meetings and appointments can make for a full-time job, especially in a world where everyone keeps a full calendar. But automation software can play the role of scheduler, handing appointment booking, reminders, and follow up in minutes instead of hours.

Schedule appointments automatically

If you use an app that integrates with automation software, like AppointmentCore or ScheduleOnce, customers can automatically add themselves to your calendar. Apps display available appointment times and allow customers to choose a slot, while simultaneously capturing customer information, creating a booking in your system, and sending confirmation emails to both parties. By automating the process, both you and your customers are spared the hassle of comparing calendars and exchanging emails about your availability.

Send emails before and after the appointment

Missed appointments mean missed opportunities and revenue for your business, but you and your employees don't have time to call or email every customer about their appointments. Using automation software, you can schedule an email that contains a reminder and your cancellation policy to be sent at a predetermined time, whether it's a week or a day before the appointment (or both).

To save even more time, you could also ask customers to complete a web form before the appointment instead of manually collecting information in person. (See page five for more tips about organizing customer information).

In the same automated sequence, an appointment can also trigger an email to be sent in the days after the meeting. Follow up on the visit while it's still fresh in the customer's mind, whether you send a survey, an educational blog post or video, or a simple thank you.

Inside an Automated Office

How one full-time employee at Virtuance screened 893 job applicants in a year

Jeff Corn, co-founder and CEO

Denver, Colorado

Over the last year, Virtuance received 893 applications from candidates looking to join its network of real-estate photographers.

All 893 applicants were vetted by only one full-time employee, with assistance from a part-timer. The same full-time staffer was also responsible for hiring fifty-two of those candidates and facilitating their month-long training process, not to mention managing the daily work of the company's one hundred photographers.

Virtuance co-founder and CEO Jeff Corn estimates the work would have required ten full-time employees—if the company hadn't automated the processes.

Automation has allowed Virtuance, creators of a proprietary image-processing system called HDReal, to focus on growing the business instead of merely maintaining it. Here's a look at how the company uses Infusionsoft to automate its photographer hiring and training processes.

1 Candidates jump through automated hoops

A photographer position posted on job boards like Craigslist, Indeed, and photography sites can attract as many as forty applicants, which Corn categorizes in two ways. “There are people who really want jobs,” he said, “and there are people who are throwing anything at the wall to see what sticks.”

To weed out uninterested and unqualified applicants, Virtuance uses an automated, three-part job application process. Candidates initially apply via a web form, which asks for information about their availability and camera equipment. Once they complete the form, they receive short essay questions to answer. Last, candidates are asked to review requirements and indicate their compliance.

More than forty percent of applicants are eliminated by the end of the third stage, either because they don’t meet the job criteria or they don’t complete the process. “They’re people we would have spent time with, but we allowed them to realize for themselves they weren’t interested,” Corn said.

The hiring manager then reviews the remaining applications, inviting top candidates to interview by phone and rejecting others by tagging them in the software. The tags trigger an automated yet personalized email to the candidate that explain the reason behind the rejection, like scheduling conflicts or insufficient equipment.

2 Photographers receive the same training, every time

With photographers in 13 states, Virtuance wants photos taken in Florida to have the same qualities as those shot in Colorado. But before it was automated, photographer training was inadvertently inconsistent. “It was falling through the cracks,” Corn said. “Some photographers would get information, and some wouldn’t.”

Now, a series of automated emails guide photographers through their first month on the job, providing instructions, answers to frequently asked questions, and other resources. Automation is providing the kind of efficiency and consistency necessary for Virtuance to expand its technology nationally—and, Corn hopes, internationally.

“There’s no way we could scale the business without processes like these,” Corn said. “If there’s a task we’re doing more than once, and it’s taking more than a couple minutes to do, it’s automated. In this day and age, it’s so silly to do the same things over and over.”

Conclusion

If you're considering whether your office could be more efficient, think of any task you or your employees do over and over. Maybe it's re-typing an email you already sent four times this week, asking a vendor to sign a contract, or reminding a customer about tomorrow's appointment. Even if each task takes only a few minutes, those minutes might add up to hours by the end of the week. If you repeat the process more than a few times, it's worth automating.

Automating tedious tasks frees up valuable time and resources—allowing you and your team to spend more time working *on* the business instead of *in* the business.

Amy Saunders

Amy Saunders is a content creator at Infusionsoft, where she writes content that inspires and empowers small business owners. Writing about business brings Amy's work full circle: She began her career as a business reporter at The Columbus Dispatch in Ohio before becoming a features writer. After more than six years there, she moved to Phoenix, where she was an editor at a content marketing agency before joining Infusionsoft. As a lifelong Midwesterner, Amy promises to never take Arizona weather for granted and spends her free time riding horses, playing tennis and hiking in the sun.

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