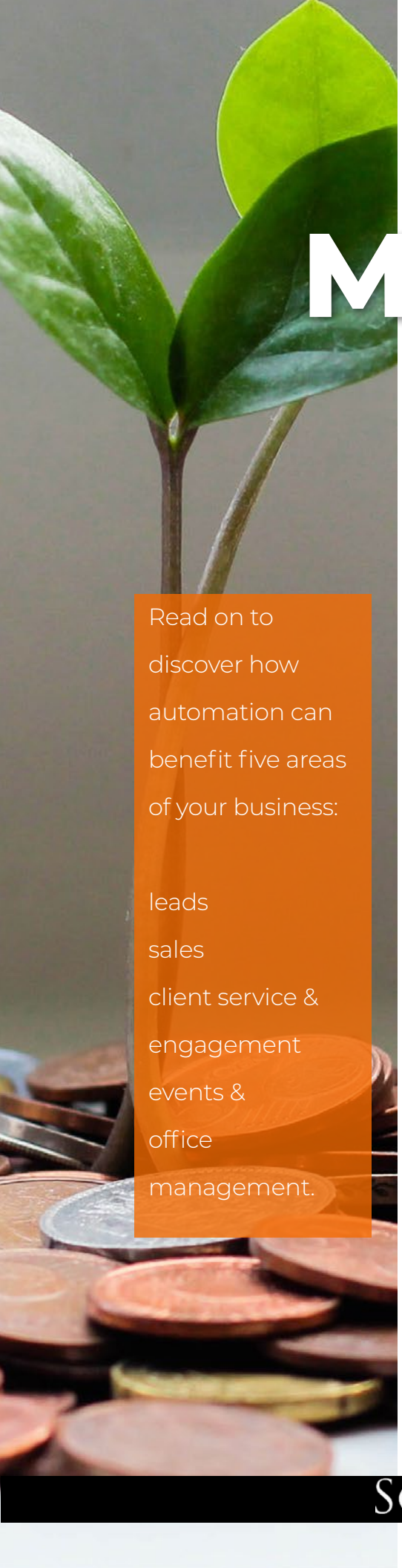
AUTOMATION

KEEP YOUR BUSINESS GROWING

21 BUSINESS ITEMS

EVERY INDEPENDENT ADVISOR SHOULD AUTOMATE

SOCIAL ADVISORS



Marketing automation is everywhere.

In your inbox, it's the "sorry I missed you" email from a salesperson who just left you a voicemail. The birthday coupon from a restaurant. The reminder from a retailer you added a product to your shopping cart but never clicked "buy."

In almost every business segment, automation has become a key to success: Nearly **80 percent** of top-performing companies have used marketing automation for more than two years, according to the research firm Gleanster.

But automation isn't reserved for big companies, retail outlets or restaurants. Independent financial firms of all sizes can incorporate automation in many aspects of their practices: from capturing leads to closing sales to serving clients to checking routine office tasks off the to-do list.

When repetitive processes are automated, every team member can instead devote time to the goals that really matter—like VIP service and growing the business.

Read on to discover how automation can benefit five areas of your business:

leads

sales

client service & engagement

events & office management.

As with any communication, check with your compliance contact when implementing automated messages and processes.

AUTOMATION

allows you to be more responsive,
quick and efficient.

LEADS

Whether meeting new potential clients
or responding to those who have already reached
out, automated processes allow you
to gain and retain leads more
quickly and efficiently.

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1. Respond immediately to an email contact request.

If the "contact us" email address listed on your website really means contact you, you'll quickly be overwhelmed by the number of emails awaiting your reply (responding days later isn't an option.)

Waiting even 30 minutes to make contact **decreases your odds of qualifying a lead by 21 times,** as compared to calling within five minutes.

according to the Lead Response Management Study.

With automation software, you can respond immediately every time—without even having to think about it. Instead of taking requests via an email address, add a "contact us" form to your website. Automation platforms like SharpSpring can give you the HTML code needed for your site.

When a prospect completes the form by entering her name, email address and comments, the automation software issues an email reply right away. The response is a pre-written template, but it can sound like you just fired it off. Here's an example:

"Hi, [First Name]!
Thank you for contacting us. I wanted to let you know that we received your note. Someone will be in touch shortly."

Your potential client will be glad that her "contact us" note didn't disappear in an online black hole. Meanwhile, the software assigns you or a staff member to follow up with a phone call or other follow up method.

2. Assign inbound leads to a licensed team member.

Some people will always skip the "contact us" form and go straight for the phone. A phone chat is a great way to start building a relationship with a potential client, but without a process in place for pursuing leads, opportunities can be missed once you hang up. Too often, phone call follow-ups are filled with good intentions and poor execution.

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2. With automation software, you can set up an internal form to be used when people call your main line. Enter the client's contact information, along with any relevant notes, before using a drop-down menu to assign a sales representative to follow up. The form alerts the sales rep to contact the new lead. Meanwhile, the software sends an automated introduction email from that sales rep to the potential client.

When the introduction email is sent five minutes after the form is completed, it appears that the sales rep sprung into action after learning of the potential client's call. Your lead will be impressed by your client service before the sales rep even starts working.

3. Always win at phone tag.

It's easy to lose a game of phone tag when you're busy running your business. Say you leave a voicemail for a potential client, and he returns your call when you're in a meeting. You make a note—in your mind, maybe on a Post-It note—to call him back when you return to your desk.

But alas, voicemail again.

If the game continues, all while you're chasing other players, you might eventually give up— either intentionally or because you were too busy to remember the call. That means you had a lead, and you lost it.

Keep score by establishing an automated process for returning phone calls. Using automation software, you can note in the system that you left a message for a contact. Doing so triggers an automatic email to him:

> **"I just left you a voicemail. Sorry I missed you! If I don't hear from you, I'll follow up tomorrow."**

The software then reminds you to make the call tomorrow, as promised; no Post-Its required. (And no lost leads, either.)

4. Follow up with new networking connections.

At a conference or other event, networking efforts can pay off in the form of a big stack of business cards. But merely collecting business cards isn't the goal, of course. Start communicating with your new contacts immediately—before you both forget about the conversation you had (or before the business card falls victim to a tragic laundry error). Transfer contact information from the business card to your CRM tool, tagging each person as a conference or event contact. Then use automation software to schedule an email to be sent, whether you want to follow up an hour later or the next day.

Writing even a brief "nice to meet you" email to each new contact can drain your time. Streamline the process by writing an email template that feels personal but could apply to any new contact from the event:

> "Hello again, [First Name]!
> It was great chatting with you at the conference this week.
> If my services can be helpful to you, I'd love to continue the conversation."

Want a shortcut?
Download an app that scans business cards using your smartphone's camera and uploads contact information to your records. Snap, a free app, adds a person's name, contact information, address and company directly to your CRM.

5. Capture leads by offering free content.

No matter how brilliant your products or services are, don't expect potential clients to readily invite you into their inboxes. **The average person already receives 88 business emails a day**, according to The Radicati Group, a tech market research firm. So when it comes to collecting email addresses, you might have to give in order to receive.

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5. Content is a gift that keeps giving. By offering free content—like an e-book, PDF, video or another type of resource—to those who sign up for your emails, you gain new leads and show off your expertise while you're at it.

Free content in the form of an e-book, pdf, video can include all sorts of unusual, interesting ideas to encourage folks to share their email address to get the free content. Consider working outside the box, consider the time of year or area where the client lives and works.

Spare yourself from manually mailing resources by automating the process. Add a web form to your site that takes requests for content. When a lead enters his name and email address into the form, automation software delivers the requested resource.

Another benefit: Automation software can identify which leads were generated when the content was requested. Later on, when those leads make buying decisions, you'll have data to help you measure the effectiveness of your lead magnet.

AUTOMATION

the project manager for your sales team.

SALES

While software helps your team focus on the most important tasks ahead, it also keeps track of leads who aren't yet ready to buy, ensuring progress at every stage of the sales journey.

SOCIAL ADVISORS

6. Set a framework for your sales pipeline.

The road from prospect to client includes a few stops. Mapping the route—and adding automation to the journey—helps your team guide prospects from one destination to the next, ensuring no one gets lost along the way.

Automation software organizes the existing process that sales reps follow to close a deal. When the process is clearly defined, sales reps can move leads from one stage to another, ensuring consistency and providing visibility into where each lead needs to head next. While the sales process varies slightly with every practice, here's an example of how automation can augment a sales pipeline.

Define the sales process by four basic stages:

1. **New opportunity:** A lead has been identified. When a lead is tagged as a new opportunity, the software assigns a licensed rep to contact him.

2. **Contacting:** The lead moves into this stage when rep has placed an initial call. If the rep reaches him, the lead advances to the next stage. If the call goes to voicemail, an automated email is sent as a follow-up (see item No. 3: "Always win at phone tag").

3. **Engaging:** The rep is talking with the lead to learn about his needs and how your services can benefit him.

4. **Qualified:** The lead moves into this stage when the rep determines that he's qualified, meaning that he has the budget and authority to make the purchasing decision. The rest of the sales process plays out from here, with different automated actions set up for wins and losses, as well as leads who aren't yet ready to make a decision.

7. Set a framework for your sales pipeline.

Having more leads than time to contact them is a problem—a good one, of course, but one that needs a solution nonetheless. If you never seem to catch up with your to-do list, where do you even begin?

Automation software sets your priorities by ranking each lead based on his or her engagement with your marketing efforts, email content, social content, website visits, advertising, etc. Thanks to this lead scoring, you can focus on the prospects who are ready to discuss business over those who need more time.

SharpSpring CRM, for example, shows lead scores in terms of points. Depending on the lead scoring rules you establish in the software, points are assigned for each engagement or buying signal the lead displays. Consistent viewing, clicking, emailing and calling might result in a significant lead score. Once the lead is officially deemed hot, the software tells you to go in for the sale.

Not only does automated lead scoring eliminate wasted time in your sales process, it also informs your marketing strategy. By tagging leads based on their level of interest, you can better anticipate their needs and target them with messages tailored to their current mindset.

8. Stay engaged with prospects who aren't ready to buy—yet.

You wouldn't propose marriage on a first date, right? The same logic applies to a new prospect. In the B2B world, 73 percent of leads aren't yet ready to become clients, according to a report by the research firm Marketing Sherpa. Rather than asking for a sale during your first meeting, establish trust by cultivating the relationship over time, until the prospect is ready to make the big decision.

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8. Automating a “lead nurturing” process prevents prospects from slipping through the cracks, allowing you to keep in touch without having to remember to do so. When a tag is applied to a client who needs more time, automation software can send an email each month that gently pushes her toward a sale.

Each month, send resources that educate the prospect about your practice and address common questions she might have. Be sure to include options for increasing or decreasing the frequency of the communications. Ask her to click a link if she’d rather receive emails every other month. Set up another “contact us” link that she can click when she wants to talk to a sales rep.

With automation, that click triggers a task for a designated person to contact her.

While lead nurturing affords the prospect more time, it also ensures that sales reps focus on the leads who are most prepared to buy. On average, nurtured leads result in a 20 percent increase in sales opportunities, compared with leads that didn’t receive that attention, according to a study by the B2B marketing publication DemandGen Report.

9. Welcome a new client.

The sale is just the beginning of your relationship with a client. Make a good first impression by sending a series of welcome emails to show new clients that you value their business and care about supporting them.

Staying in touch is effortless with automation software. Set up your software so that the new client tag in your CRM triggers an email series. In the first email, sent immediately after client acquisition, include a thank you and an introduction to your team—whether that takes the form of answers

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9. to frequently asked questions or an overview of what your services entail. Consider sending a thank you gift.

Check in frequently and effortlessly with automation. Include helpful content. A few days later, solicit feedback by sending a survey or asking about the on-boarding process. If the new client is dissatisfied, you'll want to take action sooner than later.

Welcome emails have benefits beyond the warm and fuzzy kind. According to a study by Experian Marketing Services, welcome emails have an open rate of nearly **58 percent**—compared with less than 15 percent for other promotional emails.

Now, more than ever, you have your client's attention.

WELCOME A NEW CLIENT.

In "21 business items every Financial Advisor should Automate" number 9 is of course, one of our absolute favorites.

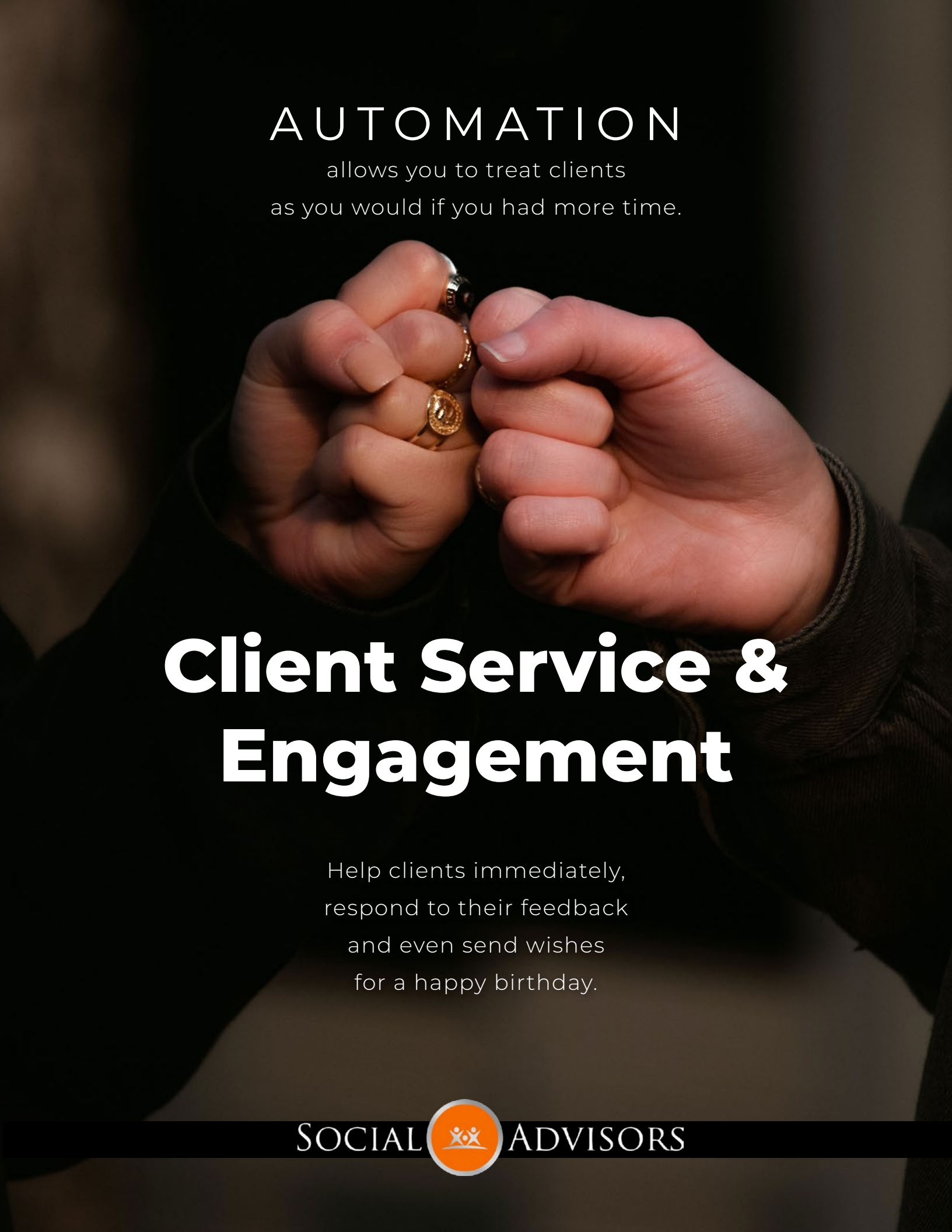
We would love to welcome you as a new client.

We have both the team and the tech to support you in your business development. If any of this is catching your attention, we would happily develop the strategy you need.

Just **click here** or email us, **info@social-advisors.com**

AUTOMATION

allows you to treat clients
as you would if you had more time.



Client Service & Engagement

Help clients immediately,
respond to their feedback
and even send wishes
for a happy birthday.

SOCIAL ADVISORS

10. Make it easy for clients to ask for help.

When a client needs help, nothing is more frustrating than a hard-to-find contact link and a slow-to-respond company. Six in ten consumers have decided against an intended business transaction because of poor client service, according to a report prepared for American Express. Make sure your company meets—and exceeds—the client's expectations every time by automating a process for responding to inquiries.

Include a "contact us" link in every email to spare clients the task of locating it on your website. When a client clicks the link, automation software tells a predetermined staff member to follow up.

With an automated process, the client receives a better, faster and more personalized answer than she would have by contacting a general phone number or email address. In the software, employee names can be added to a contact drop-down menu to ensure that tasks are routed to the appropriate people.

By assigning certain staff members to certain types of requests—a support person for a technical issue, an assistant for an account issue, a rep for a prospect inquiry—you immediately connect the client to the person who can help the most.

11. Send appointment reminders.

In our over-scheduled world, clients need reminders about appointments—and reminders of reminders, too. Forgotten appointments translate to wasted time and money for your business, but you and your staff members can't afford to spend hours playing each client's personal assistant. While you're responsible for booking appointments, software can handle things from there.

With automation software, clients can receive appointment reminders via email after you or a staff member completes a web form containing the client's name, email address and appointment date and time. The form prompts a sequence of emails: an appointment confirmation, followed by

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11. reminders in the days or hours prior to the appointment. Along the way, a client can ask to change or cancel an appointment by clicking a link within the email. That action alerts a staff member to follow up with the client to reschedule.

Still, the task of comparing calendars and manually scheduling appointments can consume hours of your day. To take automation a step further, consider integrating your automation software with an app like AppointmentCore or Calendly, which syncs with SharpSpring and Google Calendar.

Using your business calendar, the app allows clients to view available times and book a slot—making the appointment process completely automated.

12. Gauge client satisfaction.

Positive or negative, the results from a client satisfaction survey can give you the information you need to improve your business. The client isn't happy? Find out what went wrong or what you could have done differently. The client loves your service? To replicate your success, find out why the service resonated with her.

Using automation software, email a survey link to clients who recently made a purchase.
The survey, a web form, can be as simple as one question—

> "How satisfied were you with our recent meeting?"
> —with three multiple-choice answers:
> "not satisfied," "neutral", "satisfied" and an opportunity to elaborate.

Automate your follow-up accordingly. Set up the software so that a negative response triggers a task to contact the client via phone or email. Reaching out quickly can prevent further damage. The majority of consumers give firms another chance after an initial poor experience, but

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12. nearly **60 percent will switch firms** after a second or third negative experience, according to a report prepared for American Express. If the response was positive, send an automated email to thank the client.

13. Ask clients for an introduction.

It's the oldest marketing strategy in the world. Word-of-mouth is the most trusted form of advertising, with 84 percent of people saying they completely or somewhat trust recommendations from people they know, according to Nielsen. But sometimes, clients need a little reminder to spread the word. Ask clients to give referrals and introductions by sending an automated email.

When the client enters a friend's name and phone number into a web form, your software will issue a task for you or a staff 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 inboxes. Pick up the phone, then ask about opting in to your emails.

14. Clean up your email list.

"The more, the merrier" doesn't always apply to email lists. All subscribers initially said they wanted your emails, but over time, some change their minds and become uninterested in reading them.

Continuing to email them, anyway, can hinder you from reaching the people who want to hear from you. That's because email providers like Gmail measure engagement—how often people open, click and otherwise interact with emails—in order to detect spam. High engagement tells Gmail that people want your emails. Low engagement suggests that they don't—especially if some people mark your emails as spam. If that trend continues, Gmail might label you a spammer and block all of your emails from inboxes.

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14. With automation software, you can prune your list by targeting inactive subscribers. Because software tracks engagement metrics like opens, clicks, orders and web form opt-ins, you can single out subscribers who have been low engagement or M.I.A. (120 days is a good measure).

Once the low-engagement crowd has been identified, schedule a series of **three** automated emails asking, **"Do you want to keep receiving my emails?"** Because you're targeting known non-responders, use an arresting subject line like, **"Hey!"** In the email, give readers the choice of two links. If they click "yes," the software will remove the "inactive" label. If the answer is "no," they'll no longer receive your emails.

Spam reasons aside, email list hygiene is important for your marketing efforts. Realistically, your target demographic isn't everyone on the planet. Paring down your list allows you to better understand your clients' needs and interests, helping you craft more precise messages.

15. Remember every client's birthday.

With automation software, remembering birthdays and other significant date in your clients' lives is a piece of cake. Enter the dates you want to commemorate then set up an automated sequence to send a birthday, anniversary or holiday email on the right day....without any effort.

16. Gain social media followers.

If you're using social media (and you should be!) for your marketing efforts, you can use automation to beef up your followers. Whether you tweet every day, create a Facebook event every week, or connect with local professionals on LinkedIn, social media platforms provide a great way to stay in front of clients and prospects without bombarding

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16. them with emails. But if a social media campaign is posted and no one sees it, did it even happen?

Gaining fans and followers on social media is almost effortless with automation software. Send clients an automated invitation to check out one of your social profiles:

"Did you know that we post educational videos on Facebook every week? Click here to check out our Facebook page."

When a client clicks the link, your software's work is done. You can't guarantee that clients will decide to "like" your page, but at least you've made them aware that your profile exists.

P.S. Add a P.S. to your email for the inevitable clients who don't use social media:

"If you aren't on Facebook, could you please click here to let me know?"

If the client clicks the link, the software takes note so you don't ask again in the future.


AUTOMATION
keeps the important tasks
in the right hands.
EVENTS
Hosting an event keeps you busy enough.
Let automation handle some
of the details,
like registrations,
confirmations and promotion.
SOCIAL ADVISORS

17. Automate the event registration process.

If you're planning an event for your business, for new or existing clients or both, your to-do list can easily grow into a to-do book.

Having no-show *nightmares*?

Schedule an automated email to be sent the week or day before the event as one more reminder.

Focus on the big picture by automating some of the most time-consuming tasks of event planning: invitations, sign-ups, confirmations and reminders.

On your website or the event website, take RSVPs in the form of a ticket purchase or, for a free event, through a simple web form that collects the attendee's name and email address and a little ask on if they'd like to receive marketing for future events from you.

With automation software, the purchase or the completed form triggers a confirmation email that includes a thank you for signing up, as well as key event details like the date and time, location and schedule.

18. Promote Facebook Events and Webinars.

A Facebook event or webinar is a great way to share an event with your followers—and, ideally, for your followers to share the event with their followers. But creating a Facebook event isn't an "if you build it, they will come" situation. Attracting attendees requires continuous promotion.

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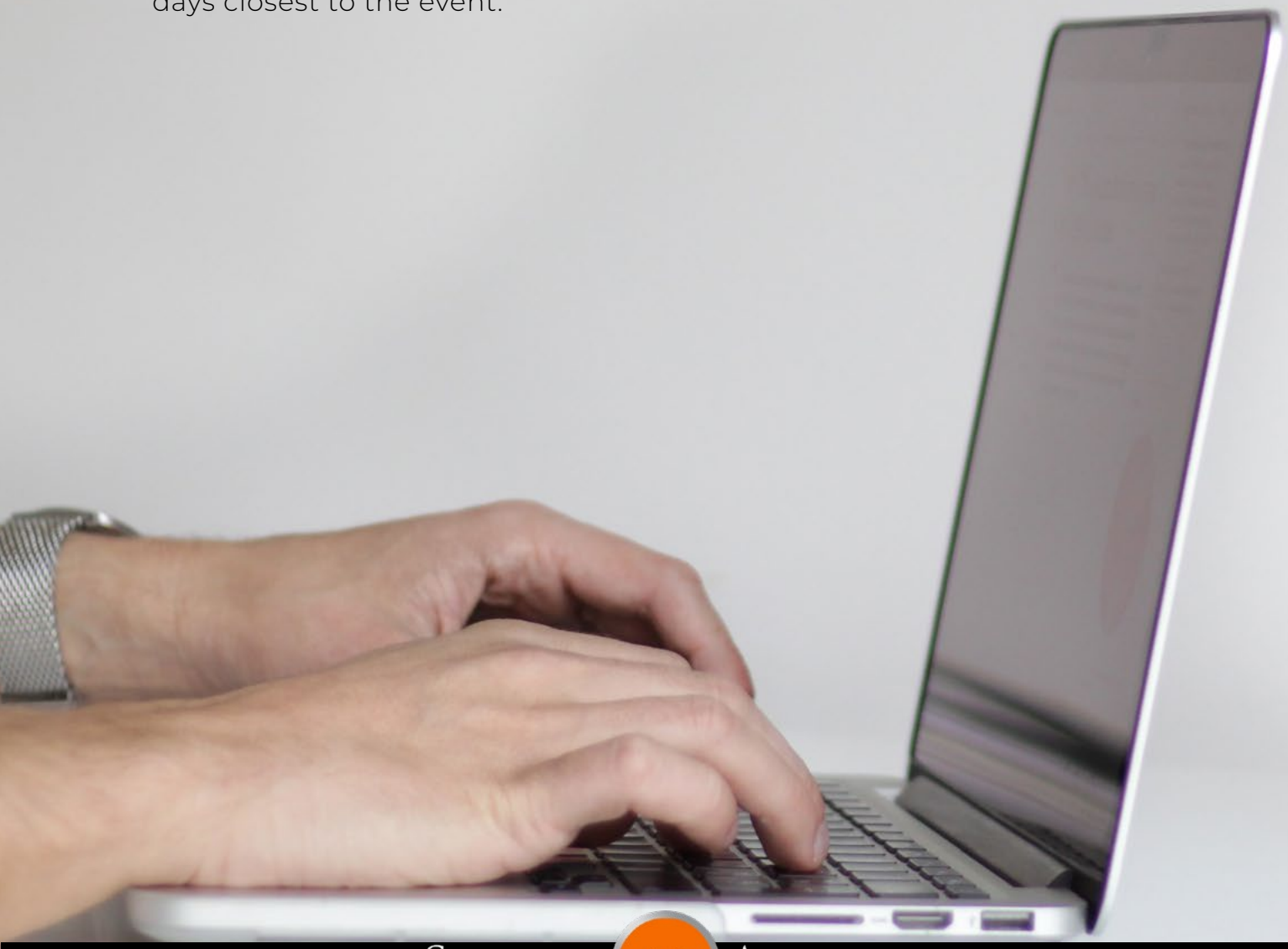
18. Drive more traffic to the event page by sending automated emails to your contacts.

Make it personal:

"Hi [First Name],
We'd love for you to attend our upcoming event."

Provide a brief description of the event, but save some details for the link to the Facebook page or the webinar registration page. Ask the reader to click to find out more.

If she clicks, you might gain (at least) one more attendee. If she doesn't click, try the last-minute approach by scheduling an automated email to be sent the day before the event. You'll be surprised who finds time in the days closest to the event.



AUTOMATION

makes more time in your life

for other important things.

OFFICE MANAGEMENT

Hire automation software to do the office work you don't have enough time for, like doing repetitive tasks, handling paperwork and managing the job application process.

SOCIAL ADVISORS

19. Make routine tasks more efficient. Automation can't (and shouldn't) replace every task performed by people.

But it can improve repetitive processes that require the human touch, helping you and your staff members save time and stay organized.

For example, maybe you send a handwritten thank-you note or gift to every new client. In the end, the task can only be achieved with pen and paper or ordering the gift. To get there, though, you can set up an automated process to help you complete and track the task.

When you apply a tag to a new client, automation software can issue a task reminder to write the note and purchase the gift. Set up the reminder to pull the client's address from your contact records so you don't have to look it up. The software also helps you keep track of these tasks to ensure you didn't miss anyone on your list.

20. Send and receive important documents.

Whether you're sending contracts or collecting tax forms, documents play a critical role in many businesses. That doesn't make them worthy of your time. Leave the paper-chasing to your software by setting up automated processes.

Say you need account statements or forms filled out. Apply a tag to each contact to tell the software whom to target with an automated email asking for the form or the document to be returned to you. Include a link to download the form from your firm website if appropriate.

21. Collect job applications.

You might not have big-company resources to facilitate the hiring process, like an on-line job portal or a human resources team. Simply collecting job applications via email could work perfectly well for your purposes. But until it's time to review applications and schedule interviews, you don't need to personally manage the process.

Employ software to automate the early tasks involved with hiring. On the webpage where you posted a job description, ask interested candidates to submit names and contact information via a web form. When the form is completed, the software sends an email asking the applicant to confirm his email address.

Once the email address is confirmed, the candidate is directed to a second web form, where he's asked to write responses to a handful of preliminary interview questions about his strengths and work experience. At that point, the software calls in the boss, creating a task for you to review the application.

Besides saving time, an automated application process has another advantage. Sending one email to apply for a job is easy. Following this process is easy, too, but you might lose a few applicants along the way—and that's OK. If candidates can't follow a few simple directions they're probably not the people you want to hire.

SOCIAL ADVISORS

SOCIAL ADVISORS ADVANTAGE

Throughout the document you'll see lots of great out of office imagery, because business has changed.

Business development process hasn't changed, the tools have. To hit it out of the park you must have a team, tech and strong business development strategy. Social Advisors has the balanced combination of incredible digital tools, an amazing team and strong business development strategy.

Automation doesn't exist for everything, only certain key things, leaving you and your team (us) to develop and execute the rest. The right automation means you save time so you can enjoy life.

Social Advisors is the team to partner with to build your business.
The goal is freedom, to do your best business and then
get out and enjoy your life.