



Get more done: automation to scale up your business

How small businesses can automate repetitive work
and scale their business through automation tools



CUSTOMER
DEVOTED

Five stats that will define 2020

1.5 million workers in the UK are at high risk of losing their jobs to automation. Conversely, UK productivity is at all time lows.

- **Office of national statistics**

UK and US brands spent 30% (£95BN) of their marketing budget on automation and AI in 2019 - Media budgets are going down.

- **BDO accountancy**

A 5% increase in customer retention delivers at least a 25% increase in profit

- **Bain & Company**

Cross-selling is responsible for 35% of Amazon's revenue

- **Jeff Bezos**



What can I automate?

1. Customer service

Automated customer query resolution, customer on-boarding and interactive product training.

2. Website personalisation

Personalised offers and up-selling to maximise order size and conversion rates.

3. Sales automation

Automated sales funnels (emails, webinars, ebooks), CRM programmes and lead nurturing emails that convert.

4. Marketing automation

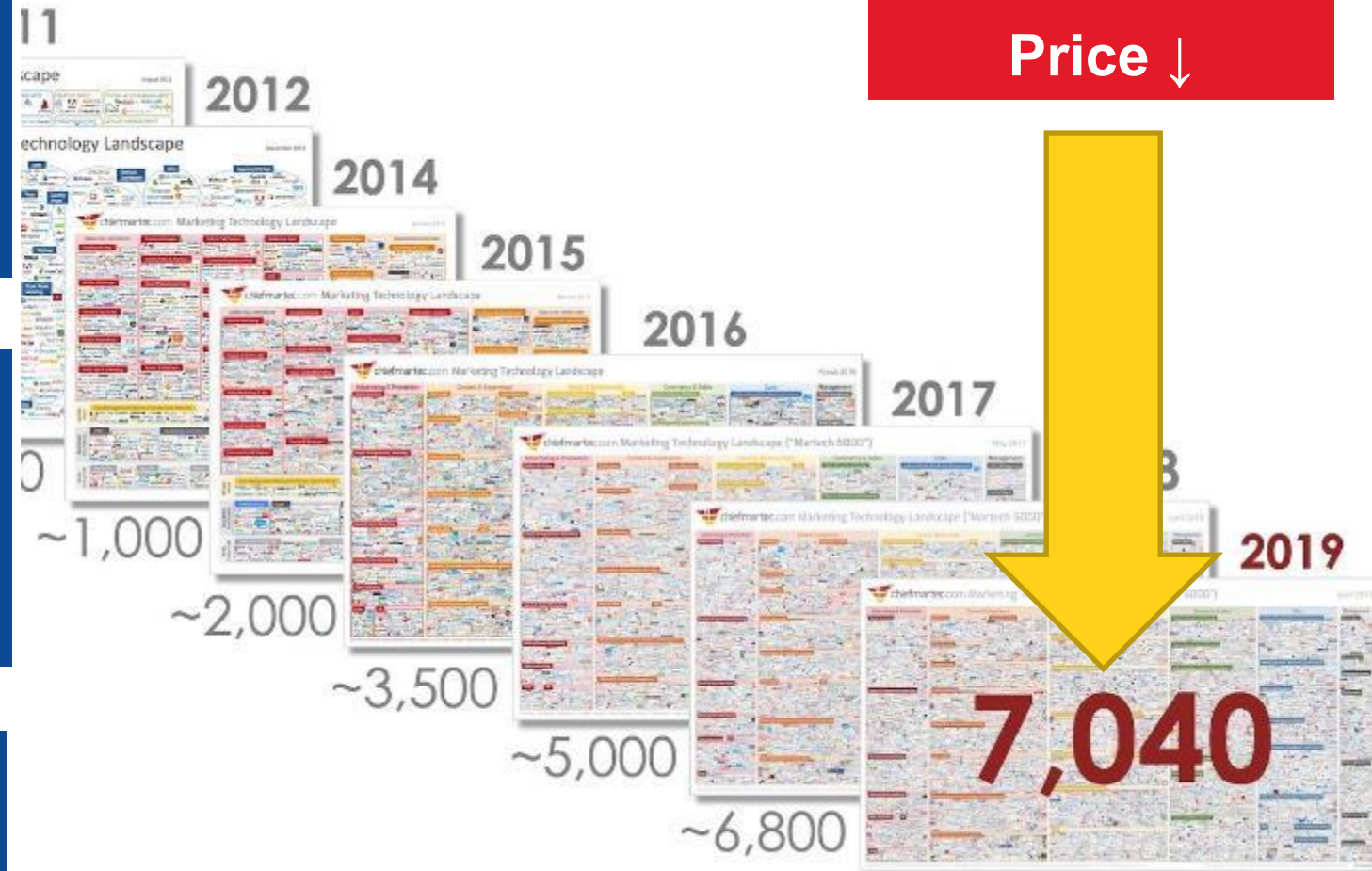
Automated lead capture, social media engagement (chatbots), viral marketing and product recommendations

5. Lead capture

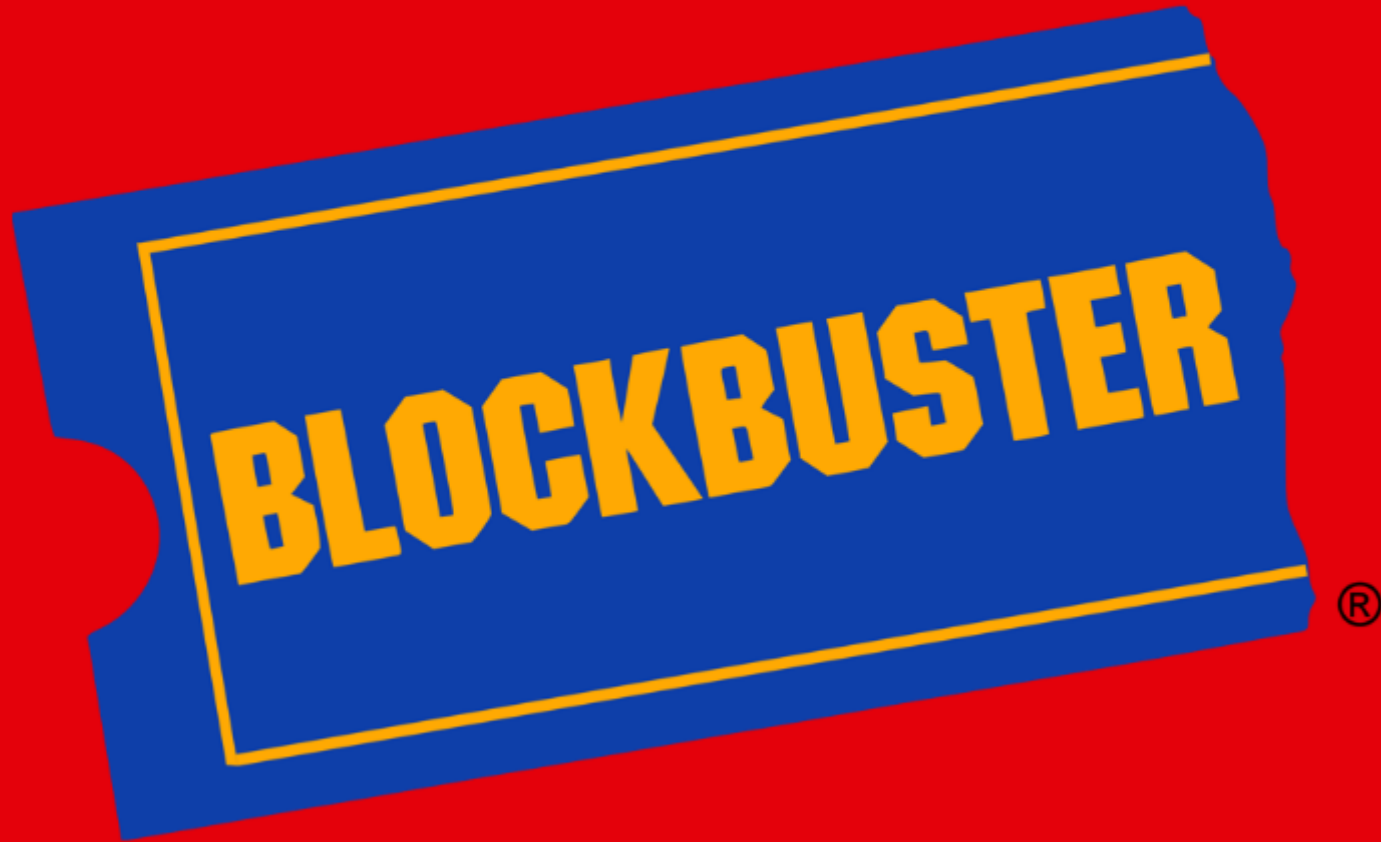
AI driven PPC and social ad campaign optimisation (lead capture campaigns) using machine learning.

6. Business reports

Real-time data dashboards showing sales, profit and marketing ROI



Disrupted!





1. Time and cost

Not automating takes longer to perform business tasks, is more labour intensive and more costly.

2. Limited scalability and human error

Non-automated businesses have limited scalability and human error – lowering customer satisfaction and retention.

3. Disrupting and being acquired

Slowed down by legacy IT and marketing systems, large corporates are less agile. Small tech driven brands that are automating are capturing market share and are being acquired (Dollar Shave club, Airbnb).





3 Quick wins

1. Marketing funnels

**5 things to
know first**

Demographics

Offer

Landing page

Traffic

Copy

**2 unknowns =
failure**

**Your competitors have
the answers!**

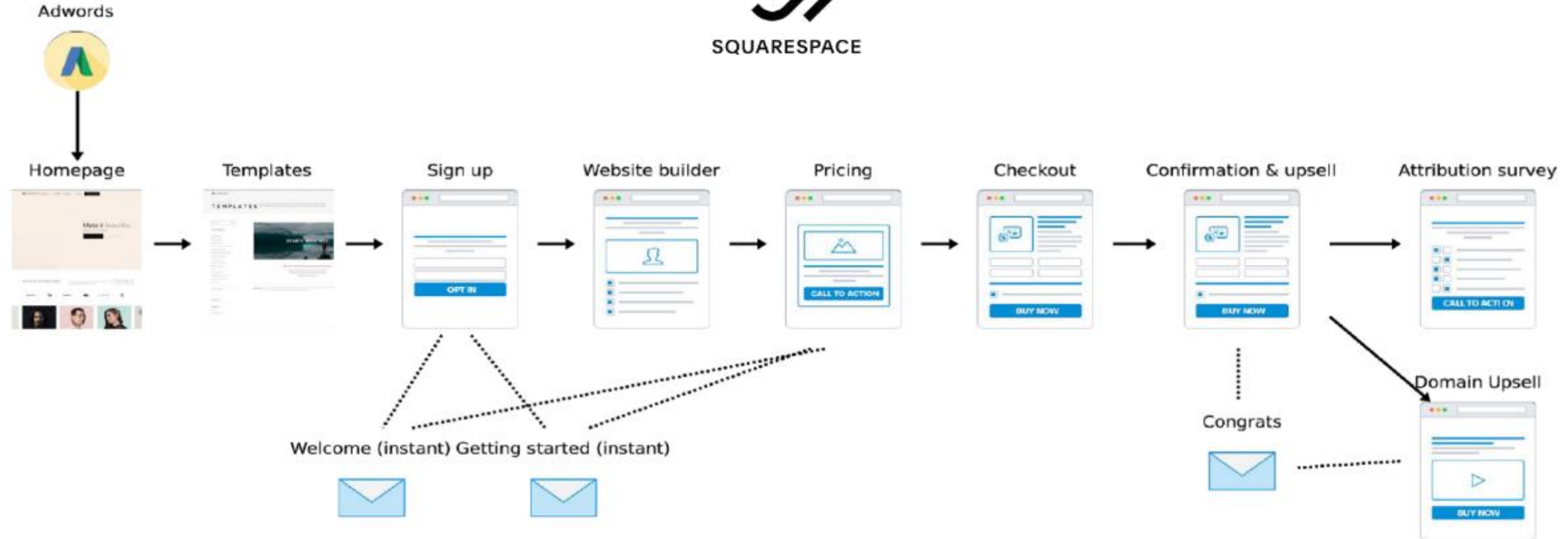


Automated acquisition funnel: Squarespace

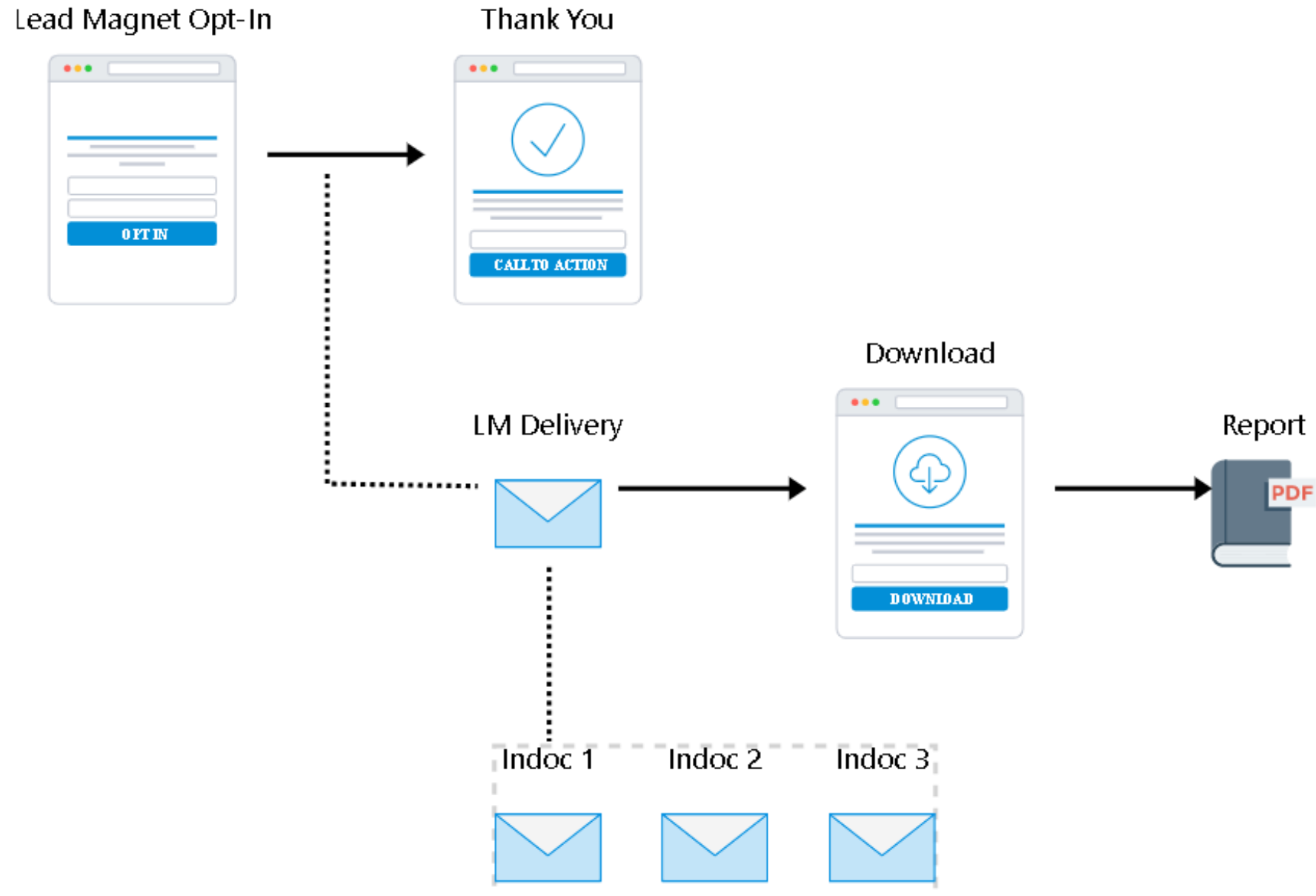
Acquisition funnel



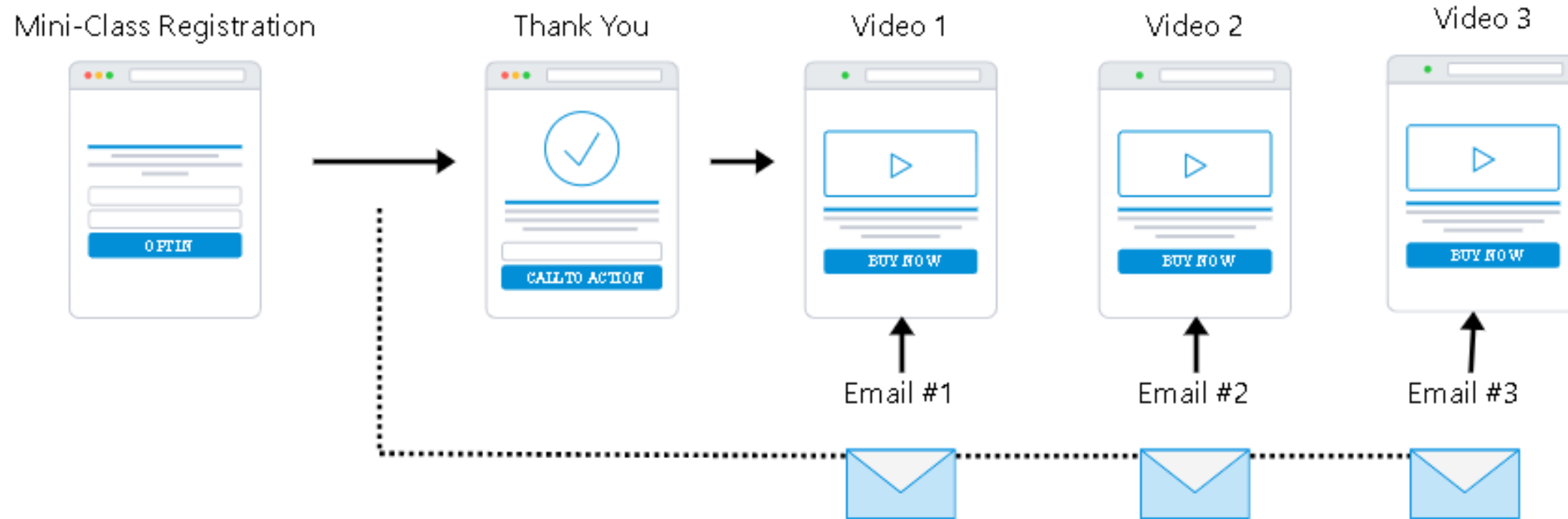
SQUARESPACE



Lead magnet funnel



Mini course funnel



Funnel Measurement

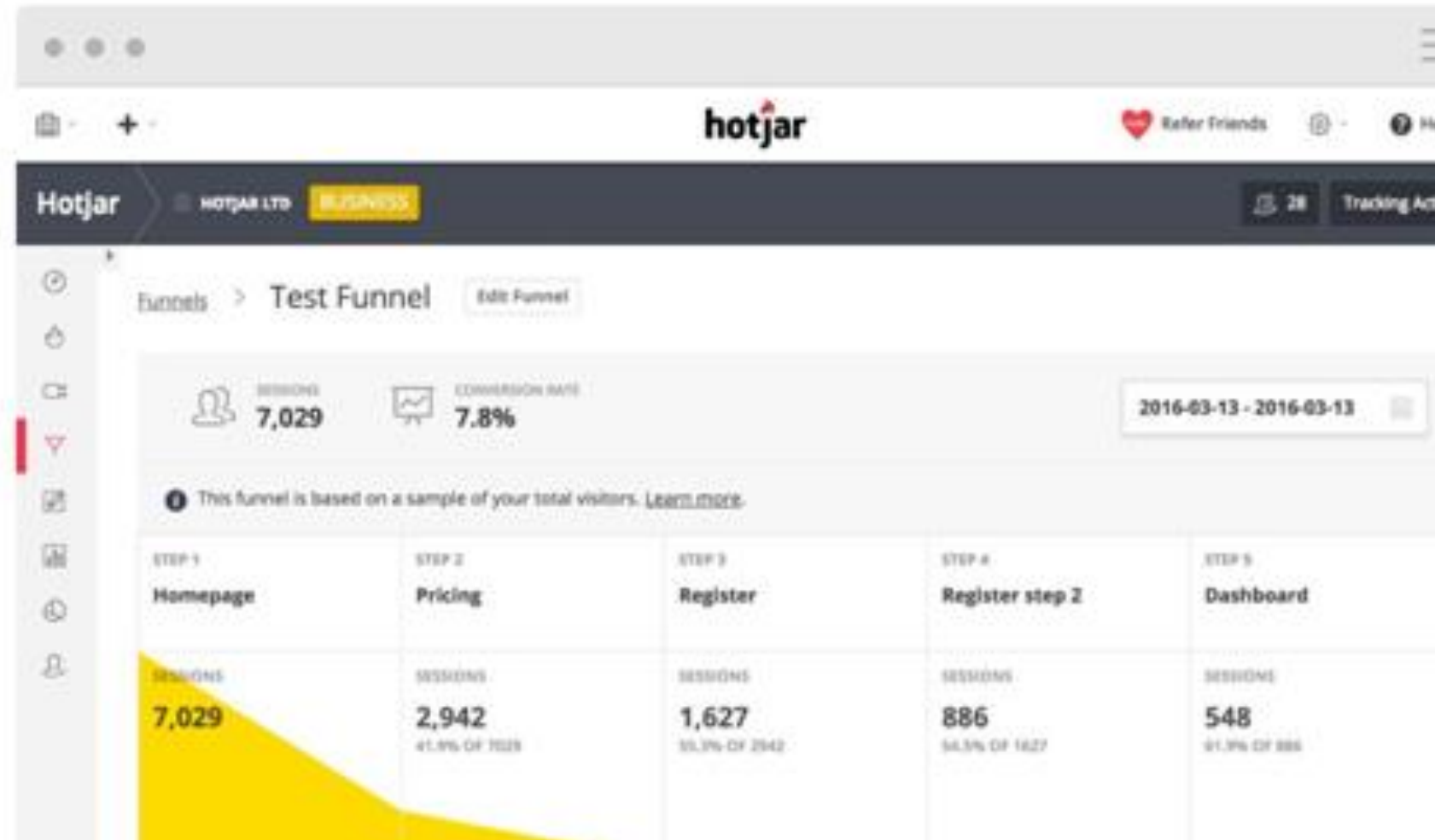
7 Funnels

+ New Funnel

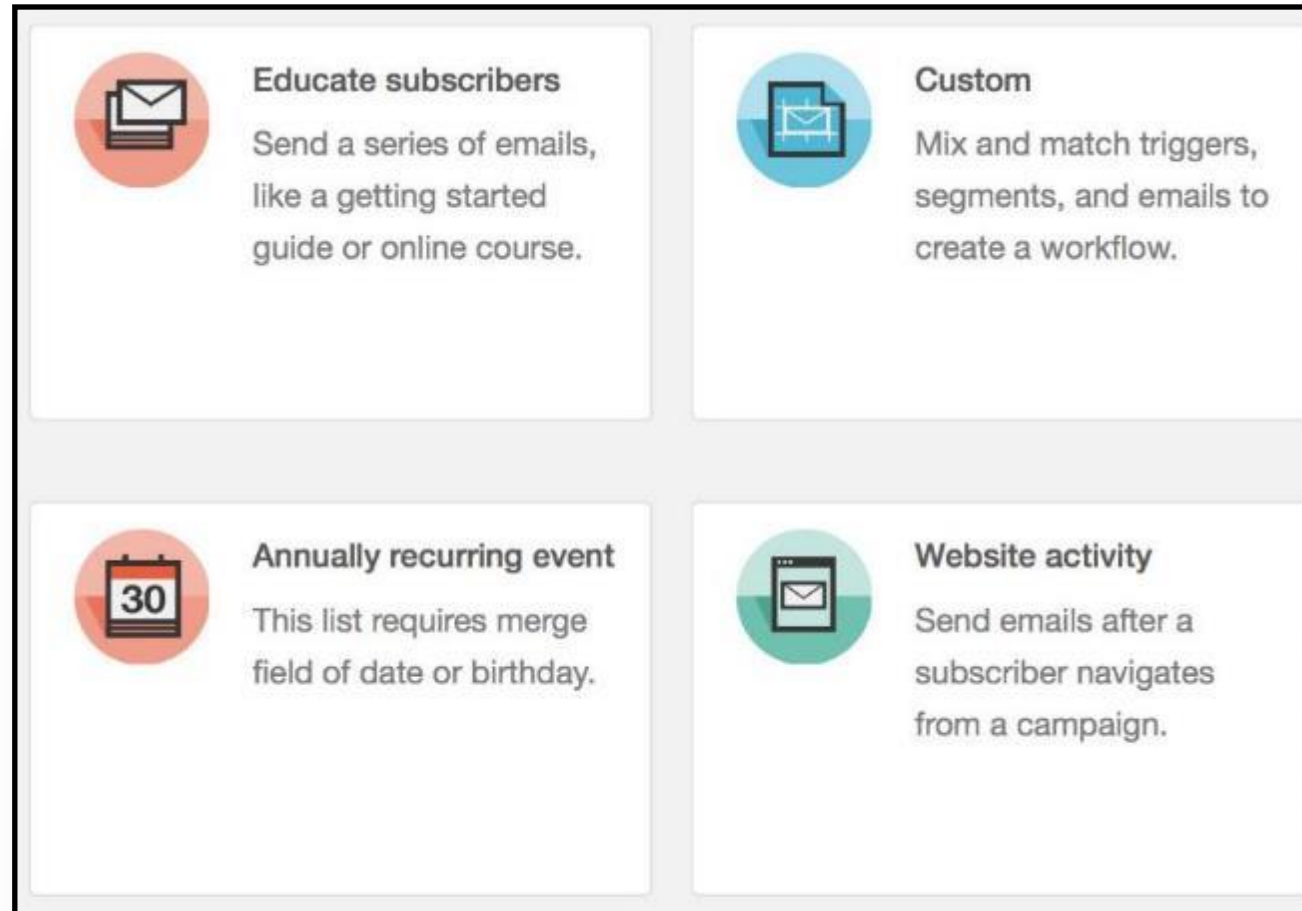
Where are your visitors dropping off? – Find the biggest opportunities for improvement and testing by identifying on which page and at which step most visitors are leaving your site.

Define unlimited steps

Watch recordings of dropoffs



2. Automated and personalised customer messages



Personalised And Triggered Emails



Trainable Customer
Service Chat Bots

3. Automated personalised website experiences

Personalise layouts, messages, imagery, copy and promotions to each individual website visitor

Test

Learn

Optimise

^ URL Based Rules

- + Current URL
- + Referring URL
- + Previous Domain Referring URL
- + First URL visitor came to this session
- + First URL visitor came to all time

^ Visit Frequency Rules

- + Number of visits to my site
- + Number of pages viewed this visit
- + Number of pages viewed all time
- + Days since visitor last saw this promotion
- + Days since visitor last engaged this promotion
- + Days since visitor last matched this targeting rule

^ Geo Location Rules

- + Country visitor is currently located in
- + Region/State visitor is currently located in
- + Zip code visitor is currently located in (US only)

^ User Engagement Rules

- + Has seen **ANY** overlay this Visit
- + Has ever seen **ANY** overlay
- + Engaged with **ANY** overlay this visit
- + Has ever engaged with **ANY** overlay
- + Has seen **THIS** overlay this Visit
- + Has ever seen **THIS** overlay
- + Engaged with **THIS** overlay this visit
- + Has ever engaged with **THIS** overlay

^ Date & Time

- + Visitor's local date
- + Visitor's local day of week
- + Visitors local time
- + Seconds spent on current page
- + Minutes spent on site this visit
- + Minutes spent on site all time

^ Technological Rules

- + Intent To Leave
- + IP Address
- + Has scrolled x amount of pixels from top of page
- + Matching Element
- + Optimizely



*From the
real experts*

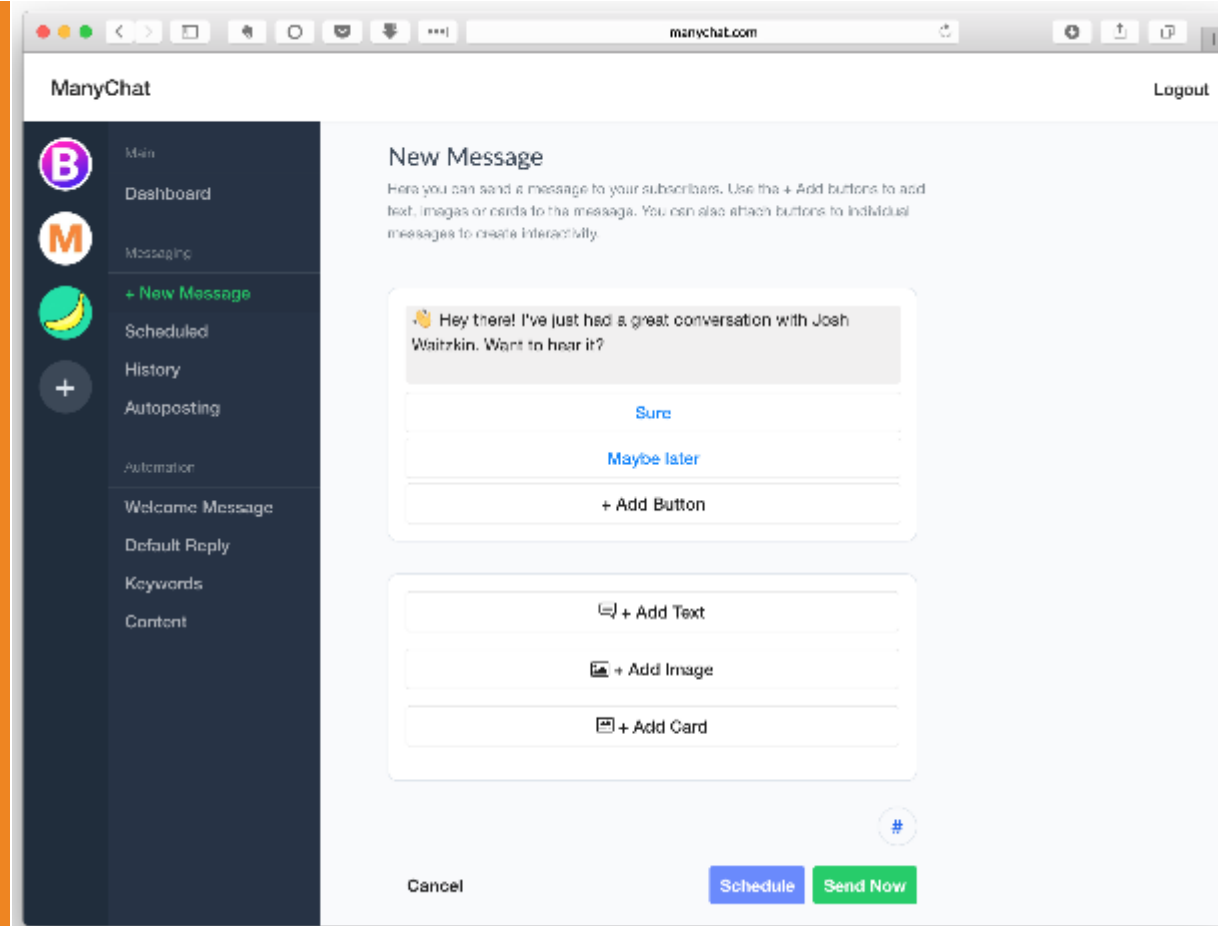
Automation tools

ManyChat

<https://manychat.com>

People open Facebook messages. Over 80% of them. E-mail? Only 20%. ManyChat is a digital customer assistant that sits on your existing Facebook page.

It responds to the most common customer questions in addition to sending out marketing messages, so when John asks how long delivery takes, ManyChat uses AI to understand his question and can intelligently answer his question.

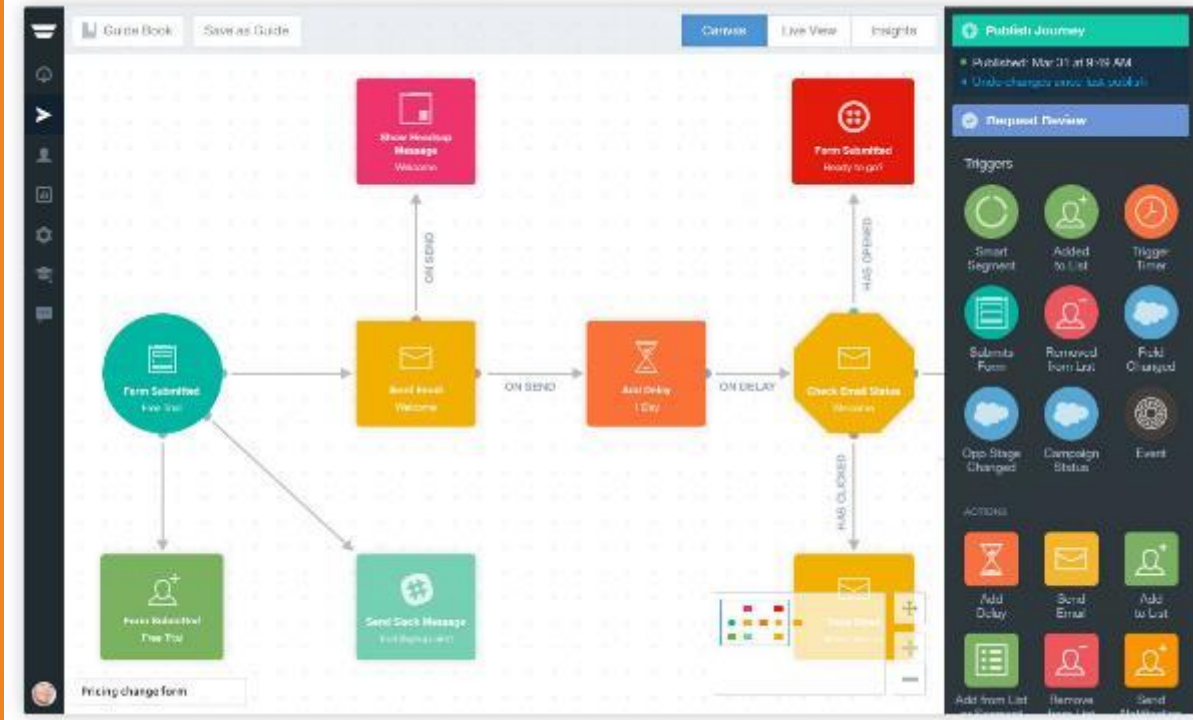


Autopilot

<https://autopilothq.com/>

Autopilot lets you automate your customer journeys. It helps you capture leads and segment customers based on their online activity and target them with personalised messages.

Autopilot also integrates directly with your existing marketing tools, such as Salesforce, MailChimp and thousands of other tools using Zapier. Create a consistent sales and marketing strategy and provide a highly personal customer experience.



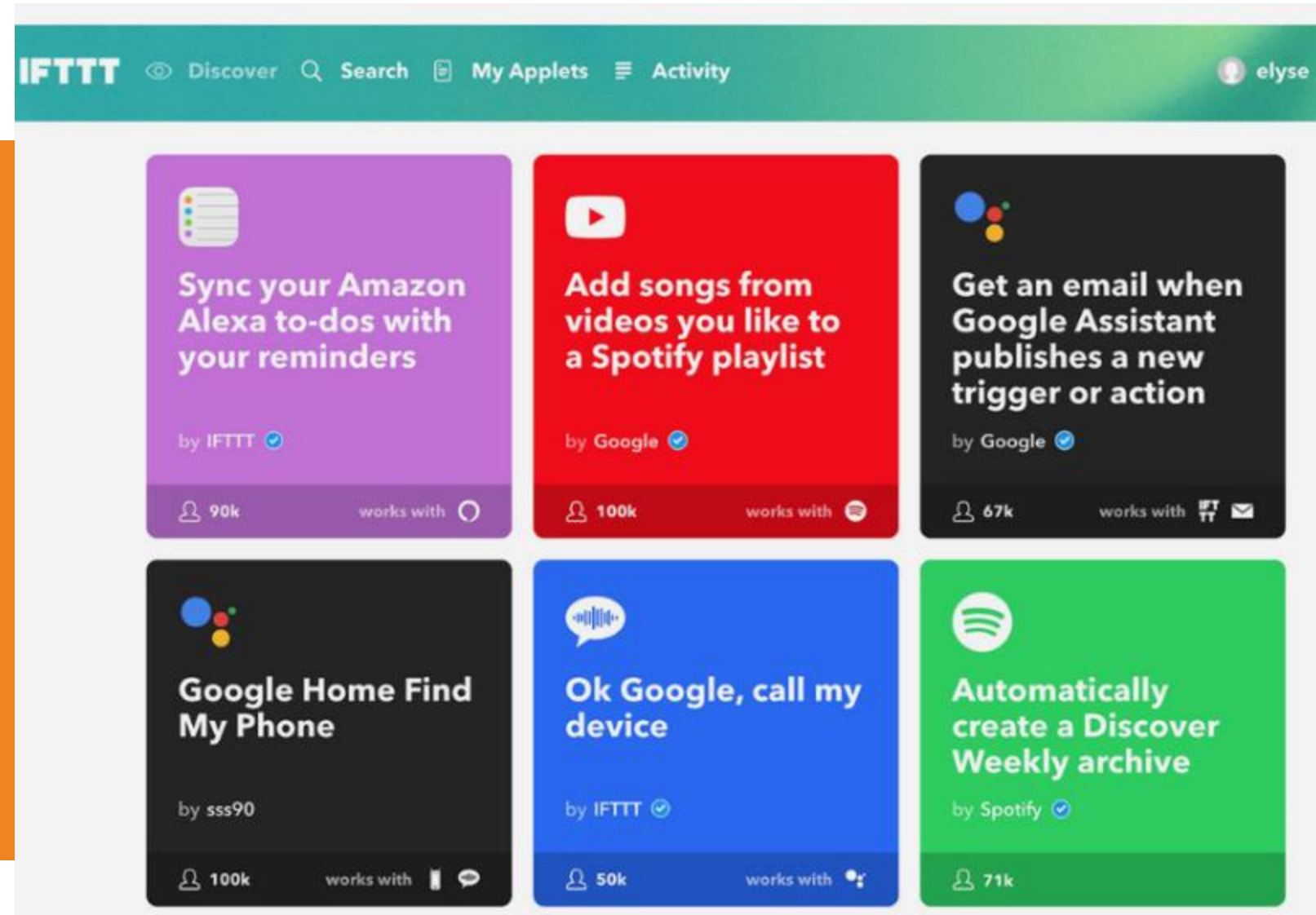
IFTTT

<https://ifttt.com/>

IFTTT helps your apps and devices work together in new ways.

IFTTT is the free way to get all your apps and devices talking to each other. Not everything on the internet plays nice, so we're on a mission to build a more connected world.

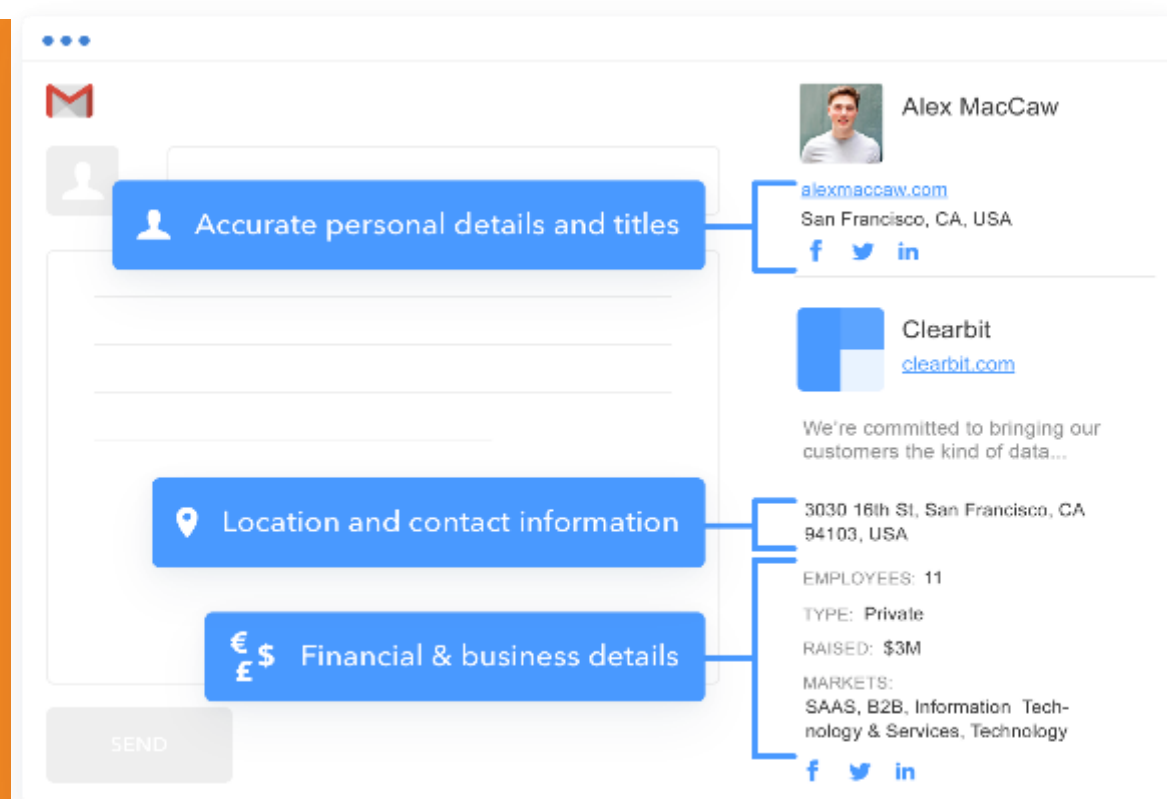
We'll show you some of our favorite pairings. Just turn on what you like and we'll make it happen for you.



Clearbit

<https://clearbit.com/>

- Find email addresses of your prospects from within your inbox.
- Discover companies that visit your website
- Automatically fill form fields and hide fields for which Clearbit has data available.
- Personalize site content for prospects visiting your site.



Feedly

<https://feedity.com/>

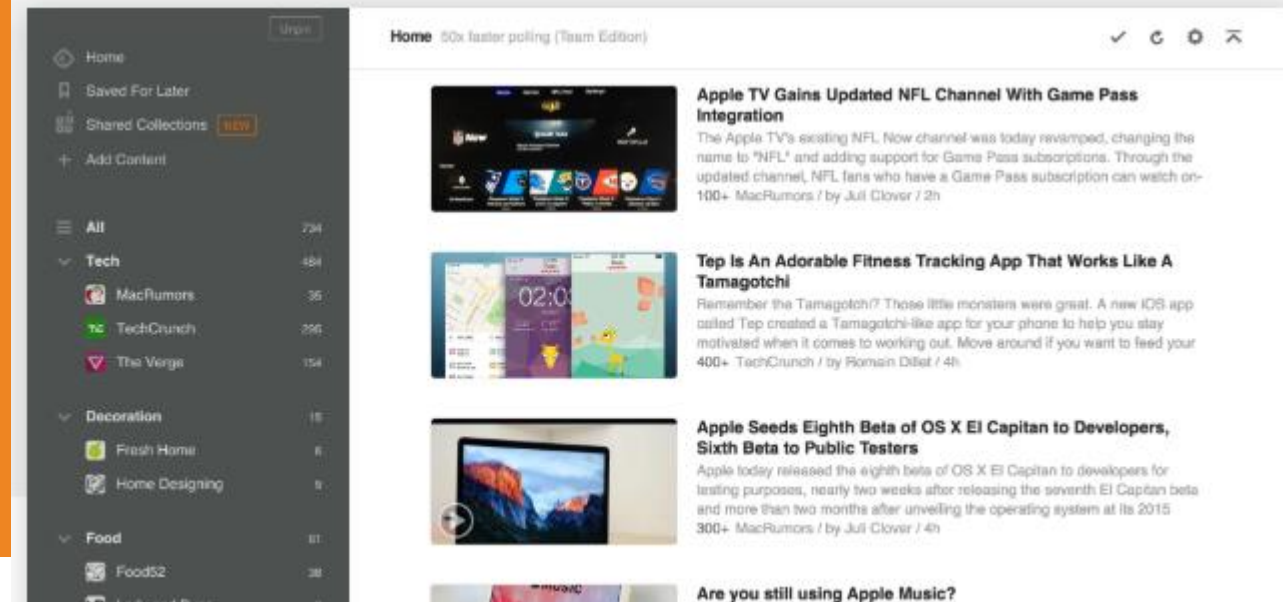
- Discover new content based on your interests
- Organise content based on social shares – to plan your own blog content for maximum shareability
- Share to social from within the platform
- Track your competitor's brand mentions by plugging in Google Alerts RSS feeds into this!

Where readers become leaders

Keep up with all the topics that matter to you.
All in one place.

GET STARTED FOR FREE

IMPORT OPML

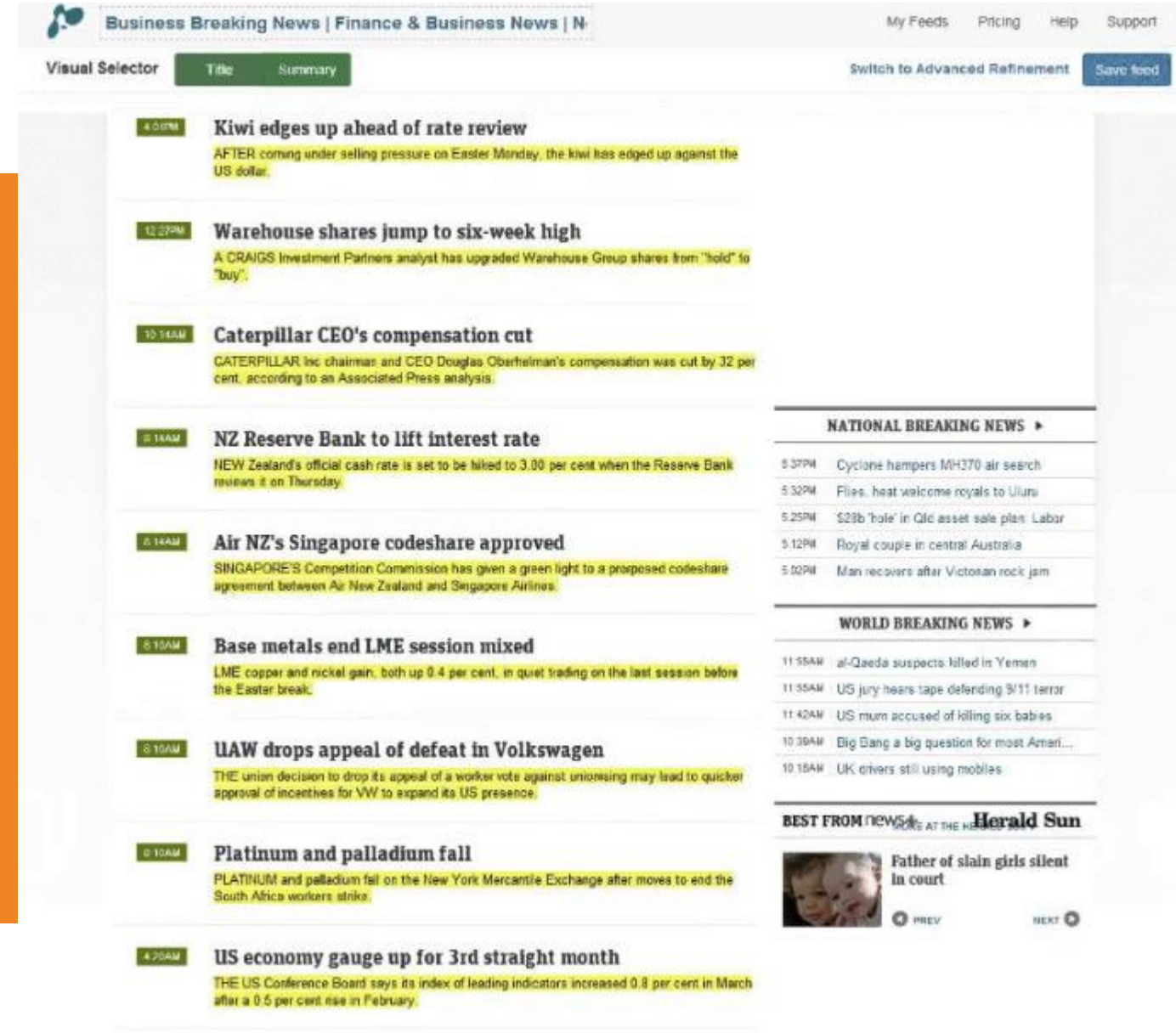


The screenshot displays the Feedly web application interface. On the left is a dark sidebar with a navigation menu including 'Home', 'Saved For Later', 'Shared Collections' (with a 'NEW' badge), and 'Add Content'. Below these are category filters: 'All' (734 items), 'Tech' (484 items) with sub-items 'MacRumors' (35), 'TechCrunch' (256), and 'The Verge' (154); 'Decorations' (18 items) with sub-items 'Fresh Home' (6) and 'Home Designing' (9); and 'Food' (81 items) with sub-items 'Food52' (38) and 'Lush and Rustic' (43). The main content area on the right shows a feed of articles. The top article is 'Apple TV Gains Updated NFL Channel With Game Pass Integration' by MacRumors, dated 2h ago. Below it is 'Tep Is An Adorable Fitness Tracking App That Works Like A Tamagotchi' by TechCrunch, dated 4h ago. The third article is 'Apple Seeds Eighth Beta of OS X El Capitan to Developers, Sixth Beta to Public Testers' by MacRumors, dated 4h ago. At the bottom, a partial article titled 'Are you still using Apple Music?' is visible. The interface includes a top navigation bar with 'Home' and '50x faster polling (Team Edition)' and a bottom status bar with various icons.

Feedity

<https://feedity.com/>

- Turn any webpage into an RSS feed
- Competitor product tracking
- Use RSS to collect data into google sheets using IFTTT
- Phone Number Extraction
- Web Data Extraction
- Streamlines content delivery between publishers and readers



The screenshot displays the Feedity website interface. At the top, there is a navigation bar with the text "Business Breaking News | Finance & Business News | N". To the right of this bar are links for "My Feeds", "Pricing", "Help", and "Support". Below the navigation bar, there is a "Visual Selector" section with tabs for "Title" and "Summary". To the right of these tabs are two buttons: "Switch to Advanced Refinement" and "Save feed". The main content area is a list of news items, each with a timestamp, a title, and a summary. The items are as follows:

- 4:00PM** **Kiwi edges up ahead of rate review**
AFTER coming under selling pressure on Easter Monday, the kiwi has edged up against the US dollar.
- 12:27PM** **Warehouse shares jump to six-week high**
A CRAIGS Investment Partners analyst has upgraded Warehouse Group shares from "hold" to "buy".
- 10:14AM** **Caterpillar CEO's compensation cut**
CATERPILLAR Inc chairman and CEO Douglas Oberhelman's compensation was cut by 32 per cent, according to an Associated Press analysis.
- 9:14AM** **NZ Reserve Bank to lift interest rate**
NEW Zealand's official cash rate is set to be hiked to 3.00 per cent when the Reserve Bank reviews it on Thursday.
- 9:14AM** **Air NZ's Singapore codeshare approved**
SINGAPORE'S Competition Commission has given a green light to a proposed codeshare agreement between Air New Zealand and Singapore Airlines.
- 8:10AM** **Base metals end LME session mixed**
LME copper and nickel gain, both up 0.4 per cent, in quiet trading on the last session before the Easter break.
- 8:10AM** **UAW drops appeal of defeat in Volkswagen**
THE union decision to drop its appeal of a worker vote against unionising may lead to quicker approval of incentives for VW to expand its US presence.
- 8:10AM** **Platinum and palladium fall**
PLATINUM and palladium fell on the New York Mercantile Exchange after moves to end the South Africa workers' strike.
- 4:20AM** **US economy gauge up for 3rd straight month**
THE US Conference Board says its index of leading indicators increased 0.8 per cent in March after a 0.5 per cent rise in February.

On the right side of the page, there are two sections of "NATIONAL BREAKING NEWS" and "WORLD BREAKING NEWS". The "NATIONAL BREAKING NEWS" section includes:

- 8:37PM Cyclone hampers MH370 air search
- 8:32PM Flies, heat welcome royals to Uluru
- 8:25PM \$28b 'hole' in Qld asset sale plan: Labor
- 8:12PM Royal couple in central Australia
- 8:02PM Man recovers after Victorian rock jam

The "WORLD BREAKING NEWS" section includes:

- 11:55AM al-Qaeda suspects killed in Yemen
- 11:55AM US jury hears tape defending 9/11 terror
- 11:42AM US mum accused of killing six babies
- 10:39AM Big Bang a big question for most Ameri...
- 10:18AM UK drivers still using mobiles

At the bottom right, there is a section titled "BEST FROM news" with a sub-header "MORE AT THE HERALD Sun". It features a small image of a man and the text "Father of slain girls silent in court". To the right of this image are two buttons: "PREV" and "NEXT".

FullContact

<https://www.fullcontact.com/>

- Build Social Profiles from email addresses
- Real-Time Updates to contact data
- Contact Info from Email Signatures
- Contacts from Business Cards
- CRM Integration



Relationships, Reimagined

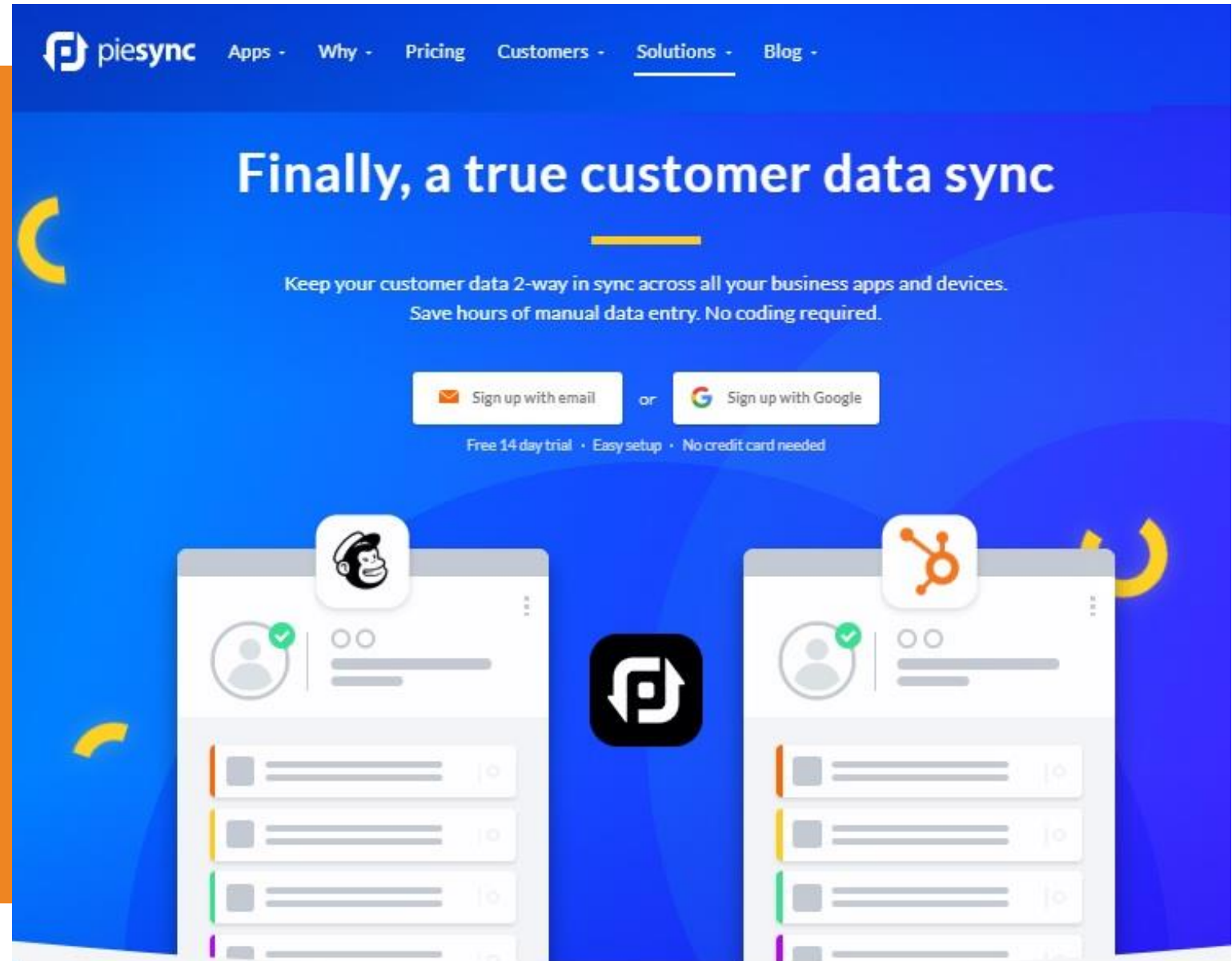
Connecting data. Consolidating identities. Applying insights.

We provide person-centered identity resolution to improve your customer interactions with a simple, real-time API integration.

PieSync

<https://www.piesync.com/>

- Build a 360° Customer View
- Automate customer data flow
- Keep all apps up to date
- Unleash your Data
- Sync Unsubscribers



Blockspring

<https://open.blockspring.com/reports>

- Easily create data integrations
- Manage all your data in one place without coding
- Use spreadsheets to store all the data and integration in one place.
- More than 100 applications can be added



Lists new

Reports

Pages

Automate Marketing Reports

Digital Marketing

Blockspring's add-ons automatically refresh your marketing reports, so that you can save 10 to 30 hours every month.

Choose your add-on:

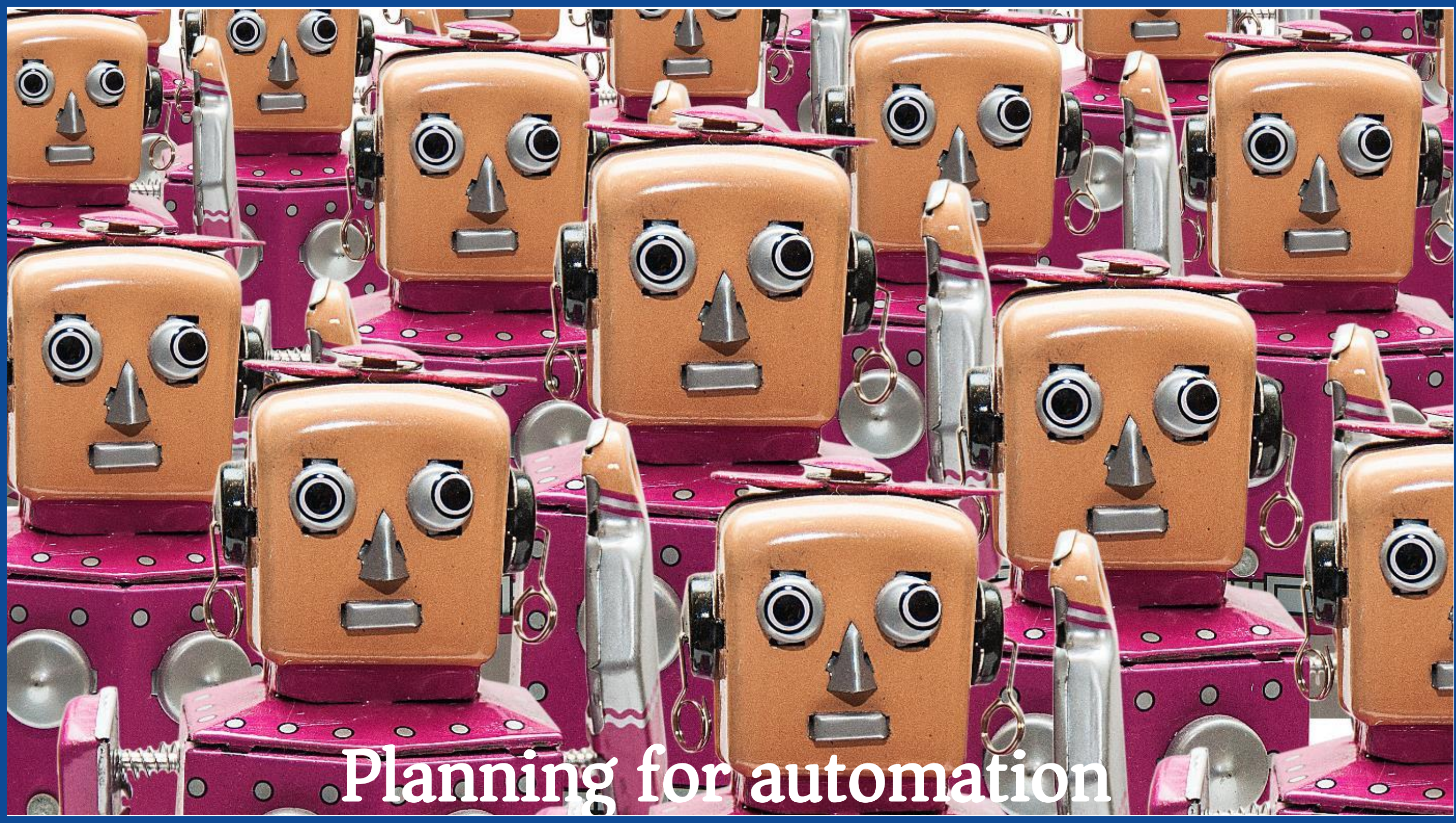
Sheets

Excel

Tableau

Available Services

Search 100+ Services...



Planning for automation

Quick sense check

Complexity	Start slowly and automate one small task first
Risk	Back-up your data and operate a test on automation before going live
Cost	Don't overinvest in tools – most offer free trials and some are free / freemium
Preparedness	Most tools are simple and designed for non techs but do your due diligence
Time requirements	Consider time saved per day, week, month and year to motivate you!

Prioritising opportunities to automate



CUSTOMER VALUE

Improves the customer experience, improves speed to resolution

(1) LOW
VALUE →
(4) HIGH VALUE



BUSINESS BENEFIT

Drives referrals, reduces churn, reduces cost to serve

(1) LOW
VALUE →
(4) HIGH VALUE



ORG BARRIERS

Available staff & resources, any legal or compliance considerations, internal resistance/support.

(1) LOW
VALUE →
(4) HIGH VALUE



COMPLEXITY & COSTS

Partnerships, technical development and infrastructure, integration.

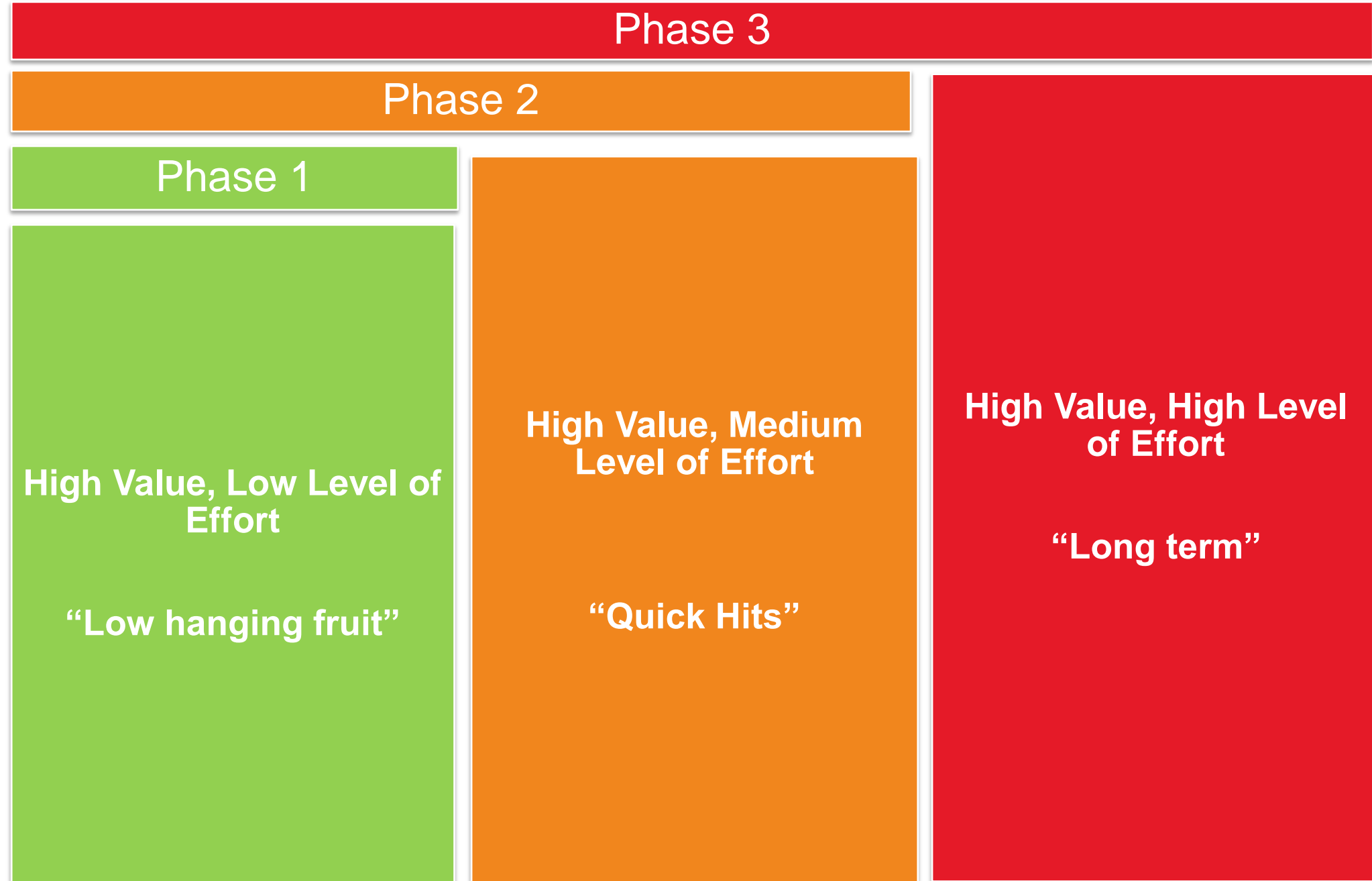
(1) LOW VALUE →
(4) HIGH VALUE



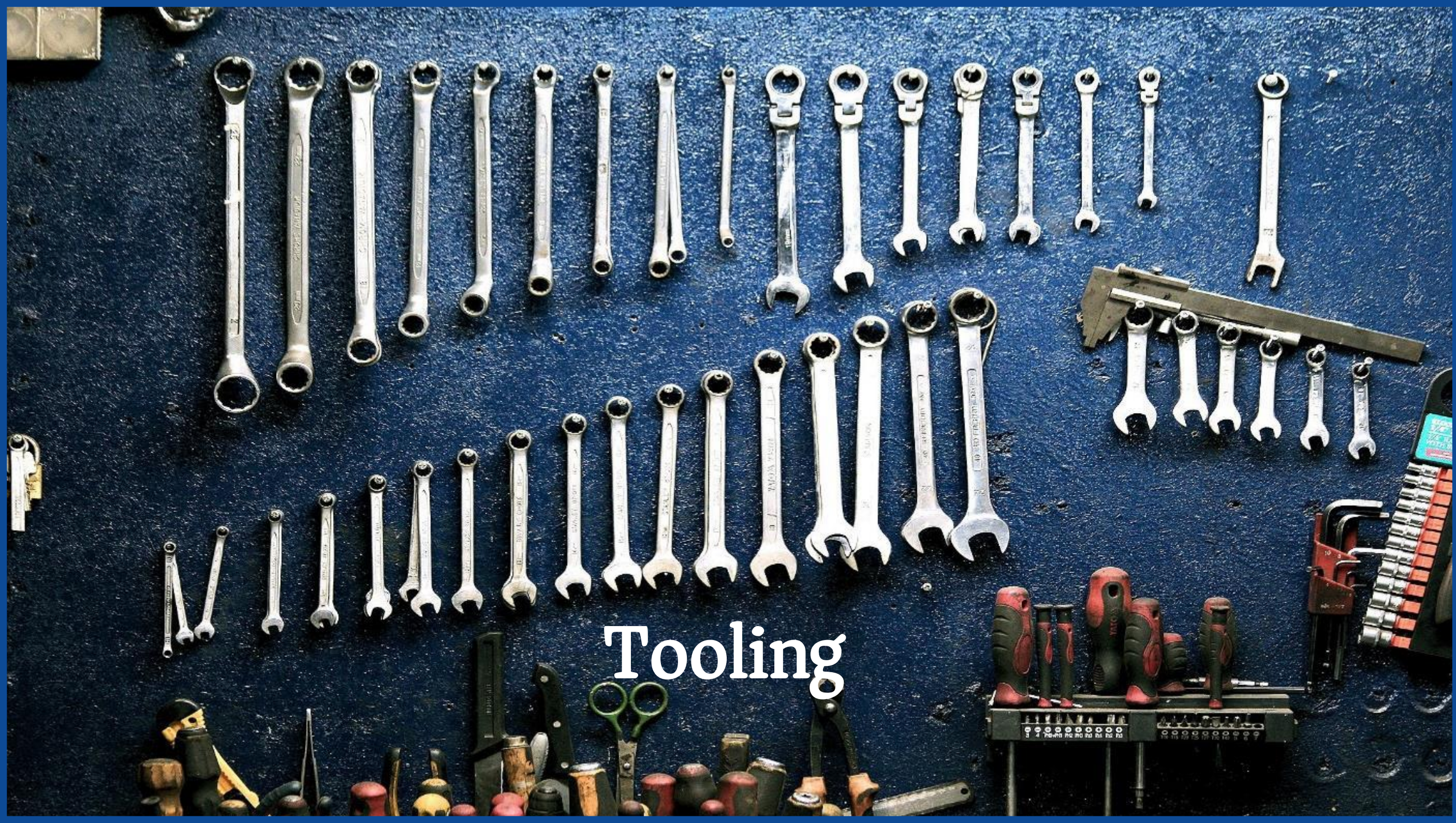
Prioritising areas to automate



Building the phased rollout plan



Tooling

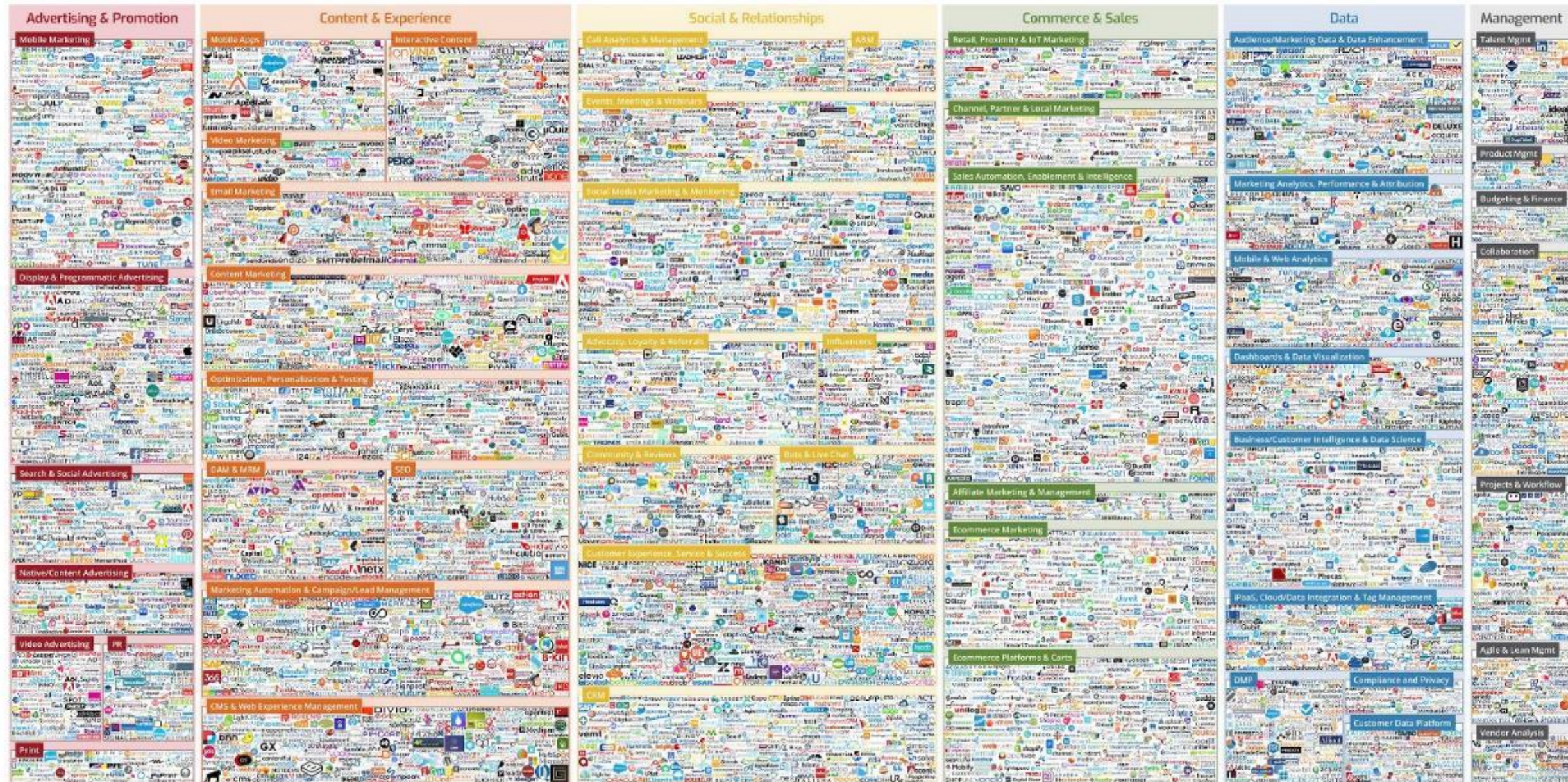


Navigate the landscape with tech specs!



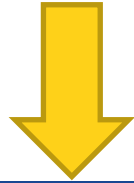
chiefmartec.com Marketing Technology Landscape ("Martech 5000")

April 2018



Selection through to implementation

How exactly do we do it today?



How does this translate into functional specs?



How does this translate into technical specs?



Integrate, train and manage change





THANK YOU

Email for this and future
strategy presentations:

james@customerdevoted.com



CUSTOMER
DEVOTED