



TRAINER'S BOX®

# Unwrapping the power of automation

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# Why automate

If you sell toys or Christmas decorations, you're probably not hurting for business this time of year. But if your products or services don't obviously relate to the holiday season, that doesn't mean you can't take advantage of the year's busiest time to buy.

These days, websites are just as likely as retail stores to reap the benefits of the season: Almost half of holiday shopping takes place online, according to the National Retail Federation. No matter what you sell, automation software, like Infusionsoft by Keap, can help you grow your business and drive sales more efficiently and strategically.

In this guide, you'll learn why, when and how to use sales and marketing automation to make this season your most successful yet.

# Top 3 benefits of using automation during the holidays

Automation software handles time-consuming tasks, allowing you to focus on more important initiatives, and ensures that you never let a prospective client fall through the cracks. And more time and more leads means more growth for your business—just in time to take advantage of the busiest sales season of the year. If setting up automation sounds like just another item on an already long holiday to-do list, consider these benefits.

## 1. Stay top of mind with clients

“Everybody’s doing it” isn’t usually a good reason to do anything, but here’s an exception to your mom’s rule. [Adobe reported](#) more than \$108 billion in online sales during the Holiday Season in 2017, and predicted that Black Friday with email driving up to 20 percent of those sales. And they act on those emails, too: 40 percent of adults say email influenced them to make a purchase.

By sending automated emails, you can start the conversation with clients and keep it going, all while you work on other aspects of your business. Automation software also allows you to immediately respond to prospective client inquiries with personalized, automated follow-up. And after the holidays pass, automated emails keep your business in touch with clients into the new year and beyond.

## 2. Save time

Whether your business is seasonal or not, November and December are busy months for just about everyone. Automating emails and tasks helps you be more efficient with the limited time you have. It also helps keep your business running when you leave early for a holiday party or take a week off to spend time with family.

### 3. Celebrate all over again

Establishing automated campaigns for the holidays requires set-up time. Fortunately, “holiday” doesn’t have to refer only to events in November and December. Many automated campaigns can be repurposed for other momentous occasions throughout the year, whether it’s Valentine’s Day, Halloween or your company’s anniversary. Plus, you can use the same campaigns next November and December, too. You could call it the gift that keeps on giving.

## The best timing for holiday marketing

Americans are predicted to spend almost \$720 billion during the holidays in 2018, [according to the National Retail Federation](#). When it comes to holiday marketing, what’s actually the most wonderful time of the year? Consider timing automated emails and promotions to coincide with the season’s busiest times, keeping these dates in mind.

### The Top Days for Ecommerce Spending

Cyber Monday, the Monday after Thanksgiving, is the top day for online shopping, according to Statista. Small Business Saturday ranks fourth.

1. Cyber Monday (\$6.59 billion)
2. Black Friday (\$5.03 billion)
3. Thanksgiving (\$2.87 billion)
4. Small Business Saturday (\$2.43 billion)
5. Day before Thanksgiving (\$1.8 billion)
6. Veteran’s Day (\$1.3 billion)

# How to take advantage of the holidays as a non-holiday business

The holiday season wouldn't seem like the time for Corey House to sell his most-expensive offering: a one-year membership to his fitness training facility, F.I.T. Strength & Conditioning. Over the holidays, people buy for others more than for themselves—and they tend to eat more than they exercise. But House found that timing annual membership offers to New Year's resolutions wasn't effective, either: After weeks of spending on gifts, customers balked at the cost of nearly \$2,000.

Instead, House began promoting membership deals over Thanksgiving weekend, before the full holiday season left customers feeling spent. "Once they're in holiday mode, they're not going to really care about buying a fitness membership," he said. "They're more centered around family."

Using Infusionsoft by Keap to send automated emails, House offered a one-month training discount of \$200 on Black Friday. On Cyber Monday, he advertised a 12-month membership with three free months for \$1,764. The results: more than \$20,000 in sales—not bad for campaigns that House estimated required 30 minutes of work.

# Three automation ideas for the holidays

From offering promotions to tracking down abandoned shopping carts, automation software can take care of your behind-the-scenes holiday tasks. Here are six ideas for putting automation to work this season.

## 1. Respond quickly to new inquiries

Automation ensures you're never too busy to respond to prospective clients. When a client completes a web form, automation software replies with a pre-written response. In addition to a greeting, include information that might be particularly useful during the holidays, whether it's a link to your most popular products or answers to frequently asked questions about holiday gifts or shipping details.

## 2. Tailor emails to your clients

Even if your target market this season is “everyone,” you can still benefit from using automation software to segment your list of clients. Separating clients into groups—men and women, for example, or people who live in one part of town versus another—allows you to create tailored messages more likely to stand out amid the holiday hoopla.

During the holiday season, consider segmenting your list based on purchase history, using software to apply tags to contacts that have and have not purchased from you before. Contacts who aren't yet clients could receive emails introducing your company and holiday offerings, while emails to existing clients can take on a more familiar tone. You might refer clients to the products or services they've purchased in the past or make recommendations for complementary products. While segmentation helps your emails resonate now, it also leads to additional findings about your clients' interests that can inform your future marketing efforts.

## 3. Offer a holiday promotion

Holiday shopping has become synonymous with deals, especially during the promotional bonanza that is the weekend after Thanksgiving. During Black Friday weekend in 2017, approximately 64 million shopped both

online and in stores. Nearly 58 million shopped only online and 51 million shopped only in stores, according to the National Retail Federation.

To get a piece of that pie, use automation software to offer your own promotion by following these four steps.

1. First, choose a promotion. Maybe you offer a high-demand product or service: something that few companies sell or that's only available in a limited supply. Or maybe you can discount a particular service or product without doing much harm to your bottom line.
2. When you decide on a promotion, you have to, well, promote it. Using automation software, set up a series of automated emails to reach clients before and during your promotion. About a week out, start with a short teaser to advertise that there's a deal to be had.
3. To identify your most interested clients, ask them to click a link if they want to hear more. Now you have permission to contact them more frequently, and your software has tagged them to receive series of separate, more aggressive emails.
4. When the promotion kicks off, clients receive an email that contains a link to the featured product or service, as well as a promo code to be entered for a discount. The link leads clients to an order form. If the client doesn't click or buy, automation software can follow up with reminders.

Source: The Lenskold and Pedowitz Groups "Lead Generation Marketing Effectiveness Study 2013"

# How to cash in on a big black Friday deal

The same strategy that helps big-box stores sell electronics also works on handmade surfboards, Luc Stokes has found. For the past several years, Stokes has offered Black Friday discounts on Degree33 surfboards, finding that the Thanksgiving-weekend sale suits the mindset of his customers.

“They’re mentally in a position of, ‘This is when I’m going to buy whatever I’m going to buy,’” Stokes said. “I’m going to buy my microwave, my Blu-ray player—oh, there’s also a sale on surfboards.”

And like the big-box stores, Stokes starts hyping the sale early. Two weeks before Black Friday, Stokes uses Infusionsoft by Keap to ask all of his contacts whether they’d like to join an early notification list for Black Friday details. By joining the list, customers also get access to the sale four hours earlier than the general public. When customers opt in by clicking a link, the software automatically tags them appropriately, allowing Stokes to deliver on the promotional emails they asked for.

Over the course of Thanksgiving week and weekend, the early birds receive about twice as many promotional emails as the contacts that didn’t sign up. From Black Friday through the weekend, Stokes sends a series of increasingly urgent, automated emails about the promotion: \$100 off of a purchase (the average sale is \$550). The same offer, previously unadvertised, is offered on Cyber Monday as a last-minute bonus.

By the end of the four-day promotion, Degree33 typically brings in more than \$150,000 in sales. And, it turns out, the early birds caught (or bought) the worms: Stokes estimates that 80 percent of weekend sales stemmed from the early notification list.

## 1. Remind customers about abandoned shopping carts

Your holiday deal was so irresistible that customers had to find out more. But if they clicked the offer link in your email and never completed the

order form, don't take it personally: Studies suggest nearly [70 percent of online shoppers](#) abandon shopping carts.

Why? It's probably about money. More than half of shoppers place items in their carts because they want to see their shipping and total costs, according to comScore. But 40 percent treat the shopping cart like their version of Pinterest, storing items in the cart for safekeeping. And 29 percent are still shopping around before they decide to buy.

Win back those customers by using automation software to send a series of reminder emails when a customer clicks a link to an order form but doesn't make a purchase. Put a holiday spin on the prewritten emails: "I know how busy the season can be, so I wanted to remind you that you left something in your cart." To alleviate concerns that might prevent customers from buying, you might mention shipping information, your return policy or your customer service support. The emails—sent the day after and week after the cart was abandoned, for example—include a link back to the product for the customer's shopping convenience.

## 2. Ask customers to refer a friend

While customers are in the mood to give (and to receive gifts) this season, offer incentives for customers to refer a friend to your company. Using automation software, send an email to existing customers that directs them to a web form. When a customer enters a friend's email address, both parties receive a promo code for an offer, like \$10 off of their next purchases.

With referrals, everyone gets a gift: Customers and their friends receive a little holiday cheer, and you gain more contacts for your list. (But be sure to ask new contacts to opt into your communications so they don't treat you like a spammer.)

## 3. Stay in touch after the season ends

When the gifts have been opened and the fridge is devoid of leftovers, the holiday season is over for most people. But for your business, it doesn't have to be.

Now that customers have become better acquainted with your business, find ways to continue your conversation with them into the new year. Follow up by asking customers for feedback on purchases, recommending similar products or sending reminders to use gift cards. Or keep the giving spirit alive by sending a thank-you gift, like a gift certificate or a promo code for a discount, to customers who made a purchase during the season.

And after that? Once the new year arrives, Valentine's Day is only 45 days away. Now's a good time to start planning your campaigns.

# How to create a holiday promotion that works year round

Stephanie Soebbing, founder and owner, [Quilt Addicts Anonymous](#) Rock Island, Illinois

Between the indoor weather and need for gifts, the holiday season is high time for quilting. Spring and summer? Not so much.

Stephanie Soebbing realized that she needed more recurring revenue after the holiday season when she turned Quilt Addicts Anonymous from a hobby to a side business that sells quilting patterns and kits online.

In hopes of driving sales during the second and third quarters, Soebbing introduced a new service during quilters' favorite time of year. Automation isn't reserved only for large, established businesses: In the fall, Soebbing offered customers the chance to participate in a Christmas fabric exchange, using Infusionsoft by Keap to send automated emails and instructions.

In exchange for \$40 and two yards of red or green fabric mailed to Soebbing, customers received two yards of other participants' fabrics, plus a cream background fabric, pattern and tutorial. Soebbing was pleased to pick up 29 participants, considering quilters are accustomed to free fabric exchanges. But more importantly, she laid the groundwork for a service that she hopes will last long after Christmas. If 100 customers participated in themed exchanges six times per year, she'd make an additional \$24,000 in revenue to help her through quilting's slower months.

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