Automation and the small business

How automation technology can increase your business's productivity, improve efficiency and elevate your employees

Your quick guide to the ways automation can improve your small business

We're happy to see you here, digging into another educational resource developed to offer you valuable information on how automation can fill in the gaps in your business processes and give your employees a chance to flex and expand their skills.

The word *automation* may leave you feeling a little uncomfortable—understandable when you consider that in some industries, automation has replaced human workers. But when used judiciously, automation can actually elevate not only a business, but the humans who keep it running. That's why we put together this helpful guide to improving your own small business with automation technology.

We're here to help, so if you have questions or would like to consult with a member of our team, please reach out to our firm today.

It takes a village... and sometimes, that includes automation

From pandemic lockdowns to a great resignation, the work world has been through an unprecedented amount of turmoil in the last couple of years. The result? Ongoing recruitment and retention challenges that threaten the very existence of many small businesses.

After all, how do you keep a small business running when you don't have enough workers? And if those who remain are doing double and even triple the work, what happens when they're fed up, worn out and ready to leave?

Even for the smallest business, there's a way to fill the gaps and reduce the stress on your team: Automation. In fact, if you're using apps like Google Workspace or Hootsuite, you're already seeing what the power of automation can do for your business.

However, if you're still not quite sold on the idea of automation, read on to discover how you can weather staffing challenges, raise employees to new areas of expertise and elevate even the smallest business with automation technology.

> " Even for the smallest business, there's a way to fill the gaps and reduce the stress on your team. "

Automation stats

94% of workers say they perform repetitive, time-consuming tasks in their work

88%
of small businesses say automation allows them to compete with larger companies

63% of knowledge workers say automation has helped them fight work burnout

52% of knowledge workers would rather sit in traffic for two extra hours per day than give up their automation tools

Source: Zapier 2021 State of Business Automation Report

The key to doing business better

It's probably safe to say that probably nothing in recent history has brought home how quickly things can change more than the COVID-19 pandemic. From temporary closures to mass resignations, the last two years have been brutal for small businesses.

That's why today's small business owners must know how to pivot and fill in gaps when there simply aren't enough people to do the work—and that's where automation can step in and help save the day for both owners and employees.

According to workflow automation tool Zapier, 63% of the 2,000 small and medium-sized businesses surveyed for their 2021 State of Business Automation Report say automation enabled their business to respond to worsening conditions during the pandemic—whether that meant moving online to sell their products and services, automating curbside pickup, or completely changing their business model.

A key word in that statistic is "automation." That's because automation solutions can help you improve:

- **Productivity**
  Because data moves automatically from one platform to another, processes are faster and smoother, which increases productivity.

- **Efficiency**
  Fewer human errors mean important things don't fall through the cracks.

- **Communication**
  When you can track sales and project status, it's easy to send reminders and update team members (or customers) with progress reports.

- **Visibility**
  Information automatically flows between systems and is visible, accessible and updated for everyone.

- **Data analysis**
  Instead of guessing, you can analyze, discover and act based on solid data.

Even in so-called "normal" times, there are a lot of monotonous tasks involved in running a business. Employee job satisfaction can plummet if there's no possibility of satisfying work to do. And it only takes one unhappy and burned-out employee to bring down everyone's morale.

Automating repetitive manual tasks can free up employees to take on more productive and fulfilling work. In the Zapier report, **65% of knowledge workers said they feel less stressed at work because they don't have to worry about handling mundane manual tasks.** Not only do they get back time, but they're freed up to do more creative or strategic work—or to discover the kind of work they're good at and enjoy doing. And as a business owner, you'll also have the freedom to move away from day-to-day tasks and concentrate on more strategic plans to improve your business.

What automation can do for you...and your team

So, how and where can automation be used to fill in gaps and elevate your employees? While not every function in this section will apply to every business, here's a general overview that will give you an idea of the depth, breadth and potential that automation can bring to a small business:

Increase marketing ROI

When you collect and process customer data, you gain a better understanding of your customers and prospects—which helps you not only deliver the right message to the right audience but also improve prospect conversion and customer retention. Customer relationship management (CRM) apps (e.g., HubSpot, Zoho, Salesforce) can help you analyze, organize and personalize your marketing. It can also help you improve sales—and when the CRM works in tandem with marketing automation apps (e.g., Constant Contact, HubSpot Marketing, Pardot), you can take your leads and customers all the way through the sales funnel. Plus, apps like Hootsuite and Sprout Social enable you to manage social media content and online ads with automated posts on a regular schedule—as well as monitor social media platforms for mentions of your brand.

Better manage the sales process

Use your CRM platform to automate follow-up emails to leads who complete contact forms; assign inbound phone leads to a sales rep; offer free content (e.g., eBook, whitepaper, video, coupons); text a customer when their curbside order is ready or a repair is complete; and enable customers/prospects to opt into your subscriber list and add the information to your CRM and email marketing lists. You can also stay connected beyond the sale by automating welcome emails, occasional check-ins with helpful content like tips on using your product, abandoned shopping cart reminders, renewal notifications, and more.

Keep customer experience levels high

Customers expect their buying and post-purchase experience to be as consistent and friction-free as possible. Automation helps to standardize your processes, from the first marketing touch to the shopping experience and on through ordering and shipment. Post-sale, you can offer support options such as chatbots for basic queries or directing customers to a support rep. On the back end, support tickets can immediately be routed to the proper person at any time of day or night. You can also automate client satisfaction surveys and follow up on responses with a thank-you email or an offer to help make things right in the case of a negative experience.

Most commonly automated tasks

1. Data entry – **38%**
2. Document creation and organization – **32%**
3. Lead management – **30%**
4. Inventory management and distribution – **27%**

Source: Zapier 2021 State of Business Automation Report

Improve employee morale

"I love my boring job and want to do this forever!" is something you'll hear from...well, probably no one. And let's be honest; every business has its share of monotonous tasks. In fact, a 2020 study of more than 10,000 office workers by Automation Anywhere, a leading automation company, showed that those workers averaged more than three hours a day on manual and repetitive computer tasks that weren't part of their primary job. Automating repetitive manual tasks can free up employees to take on more productive and fulfilling work. Especially in such a competitive employment market, the chance to do more creative or strategic work—or to discover the kind of work they're good at and enjoy doing—can be the difference between an employee staying or looking for a new job.

Streamline inventory management

We're willing to bet many business owners would agree that managing inventory is one of the most monotonous, time-consuming functions in a business. Inventory management automation software (e.g., Square Inventory, Shopify, Zoho Inventory) offers real-time product data and updates that can help improve shoppers' experience by reducing back orders and adding, removing, changing and transferring product information for your e-commerce site.

Get assistance with human resources tasks

HR is an area that benefits mightily from apps that include automation (e.g., Rippling, Paycor, SnapHRM). It starts with an online job portal and an automated application process. From there, you can make a new employee's first day a breeze with automated onboarding and benefits enrollment and continue with the ability for employees to report their hours online. Taxes and benefits can be calculated and deducted from paychecks, while payroll is run automatically and then deposited or distributed to each employee.

Facilitate communication and stay up to date with ongoing projects

Not knowing where things stand when work is due (or overdue) can be a major source of stress. Project management apps (e.g., Basecamp, Trello, Asana) allow teams to collaborate virtually. From cloud platforms that keep sensitive information secure; to a centralized place for keeping notes and files; to details, deadlines and goals; it's easy to see at a glance the status of any task or project. It's a great way to see where more resources are needed—or if there are too many cooks in the kitchen. And it works equally well with in-office or remote teams.

> **A 2020 study of more than 10,000 office workers by Automation Anywhere, a leading automation company, showed that those workers averaged more than three hours a day on manual and repetitive computer tasks that weren't part of their primary job.**

Automate other business operations

We're all human, and no matter how careful we are, mistakes happen. By turning the most error-prone types of tasks, like re-keying data from one system to another, into automated functions, you can help eliminate costly errors in functions such as inventory management, order processing, shipping, scheduling, bookkeeping and invoicing. Likewise, software as a service (SaaS) solutions will automate your software upgrades and security updates to be sure you're always protected and using the latest features. You can also automate functions such as business travel planning and scheduling, employee expense management, sending documents or collecting tax forms (i.e., W-9s for freelancers).

Where to start

New software automation tools debut so often today that it's all too easy to fall prey to the "Ooh, new toys!" syndrome. But if you're armed with a strategy, solid information and the knowledge that you don't have to automate your entire business at one time, you're in a good place. A few tips to keep in mind:

- Understand your short- and long-term business objectives, so you'll know where to focus your attention.

- Draw up a realistic budget. But remember, you get what you pay for; don't simply grab the cheapest option. Look for apps with an affordable basic plan that can scale upward with more advanced features as you grow.

- Take time to evaluate your current day-to-day processes and make a list of what could be automated. Involve your employees—find out which tasks they wish they could automate and what takes up the majority of their time.

- Start with the easiest process first. For instance, is entering payroll into a spreadsheet taking time away from more productive and profitable work? If so, start there. Once that automation is running, you can move on to another function.

- Make a wish list of the features and functions you need before you start checking out software.

- Schedule demos of each app on your shortlist. Don't just buy Automation Software X because a friend tells you it's great; make sure it really works for your business. Is it easy to use? Will it integrate with your current technology stack, or will you have to buy other new software? How are the reporting features? Do they provide analytics that will help your business grow?

- Keep your customers/clients in mind as you select automation that will affect them directly. If most of them are older and don't do business online, do you really think they'll use online payments? (They might, of course, but consider it carefully.) Similarly, if your customers and prospects skew toward young digital natives, make it as easy, speedy and mobile-friendly as possible for them to interact with you.

- Technology crashes now and then. Create a backup plan for the times when automated functions aren't working so your business doesn't screech to a halt.

Automating your business might feel like an overwhelming task, but we promise, it can be done—and is being done, quite successfully, every single day. Will it take time, patience and money? Absolutely. But the benefits of automation are virtually endless. Seamless collaboration and communication...increased efficiency and productivity...reduced costs and increased ROI... improved employee morale...and so much more.

Top 10 software apps used in automated workflows

1. Google Workspace
2. Slack
3. Mailchimp
4. Trello
5. Twitter
6. HubSpot
7. ActiveCampaign
8. Facebook Lead Ads
9. Airtable
10. Calendly

Source: Zapier 2021 State of Business Automation Report

A last word about the lasting effects

As you get your automated functions up and running, start reinvesting your employees' talents and skills into areas with higher ROI. For instance, an employee who does payroll entry may want to expand into other areas of human resources or be interested in marketing or sales.

The gains business owners discover with automation have enabled small businesses everywhere to create efficient, scalable systems and processes that can compete with larger businesses. Even adopting one or two of these automation functions can continue to help your business grow and prosper when life gets back to "normal."

And normal (or a new normal) will happen again, sooner than you think. Make sure you're ready to jump in, keep your business growing and ensure your employees are professionally fulfilled. Let's take the stigma out of the word *automation* and make it work for us, rather than the other way around.

> **"Make sure you're ready to jump in, keep your business growing and ensure your employees are professionally fulfilled."**

We hope this guide has taken some of the stigma out of the idea of automation. Keep in mind that this is only a high-level overview— every business is different, but luckily, there are automation options for just about every situation.

Check with us if you have questions about automating the financial side of your business; we'd be happy to help you consider options.

Just click the **GET IN TOUCH** button and complete the brief form or give us a call.

We look forward to hearing from you!