



AUTOMATION

MADE SIMPLE

Automation for Service Based Business Owners

This offer is for online service providers (such as coaches, consultants, trainers etc) who want to save up to 12 hours and potentially hundreds of pounds every single week by implementing reliable and surprisingly simple automation processes into their business - without losing that personal touch.

I will work with you to map out workflows for each of your business processes, and from that I can then identify any duplicate steps or steps that can be eliminated altogether to facilitate a streamlined, efficient workflow which can then be automated.

Please note that only you know your business in detail, so if you want to automate a whole workflow it's really important that you either 1) have your workflows already mapped out, or 2) you're prepared to map them out with me so that I can see exactly how you get from A to B in each of your processes.

This is a non-negotiable step in order for me to be able to consider what we can automate, and how. It can be time-consuming to map out these workflows at first, but once they're done, we can go on to save you hours (and £hundreds!) every single week.

All business are suitable for automation but to benefit from a fully automated business your a good candidate for automation if:

- You're already bringing in c.£5k+ a month, but you spend so much time actually working 'behind the scenes' on your manual processes (e.g. client onboarding, invoicing and chasing up invoices, assigning tasks to your VA, website admin, expenses, other general admin etc) that you're on the verge of burning out;
- You're currently spending what feels like hours and hours tied to your desk doing repetitive admin that you either hate doing, or simply don't have time to do;
- You've tried automation yourself but you struggle to understand tech and it just hasn't worked (this is really common - you are not alone!);
- You already use a couple of web-based apps in your business such as Trello, Asana, MailChimp and so on.

You want to get away from your desk and get back to doing what you love - after all, this is the reason you started your business in the first place!

You're earning a decent amount now and you do want to earn more, but the hours you're putting in just running the backend of your business are all consuming and a huge obstacle to making more money.

You're beyond ready to get that sparkle back in your business and implement some automated magic into your business so you can get back to doing what you love.

It's very likely that you will be surprised by the amount of time that you get back, because all the admin you were doing before is now being done magically for you - and you aren't losing that personal touch your clients love and you pride yourself on having.

So, what's involved? How does automation work?

If you don't have your workflows already mapped out, we will work together over Zoom to do this. I will take you step by step to map out all the processes you want to automate - you don't need to have any prior experience mapping out workflows.

A workflow is essentially the individual steps you take to go from A to B, so with client onboarding for a hypnotherapist, for example, it might look something like this:

1. You agree to take on a new client
2. They have to then send you all relevant details (name, company name, address, email address, etc)
3. You then send them your contract and the details of the service you've agreed on providing them with
4. They then have to sign and return the contract electronically
5. You then file this somewhere on your computer and perhaps you also print it out to keep in a physical file
6. You set up an initial Zoom call to go through the finer details of the service with them
7. You go back and forth a few times with them trying to agree on a date and time
8. You send them a questionnaire they have to fill in prior to the call
9. They might have to get in touch to reschedule the call
10. Again, back and forth you go trying to agree on a new time
11. The day before the call you send them a quick reminder by email so that they don't forget to turn up
12. You also need to remind them to send back the questionnaire which is required for the call
13. You have the call, and finally, they are onboarded. Phew!

That's one example of what a client onboarding process might look like. When you look at it like that, how much time do you think is spent simply onboarding a new client?! This can **all** be automated - and I guarantee that you will not lose the personal touch!

What results can the right business expect to see, and how quickly?

You are extremely likely to see immediate results in the amount of time you are saving which correlates with the amount of money you'll save too.

One client I worked with immediately saved £3,000 a week by automating their client onboarding which is amazing - and it also meant that the automation cost was immediately covered. This particular client onboarding process was particularly lengthy due to the complex nature of the business, but it just goes to show how much time and money *you* could potentially save!

If ongoing monthly support is chosen after the initial setup of the new automation, you will have minimal involvement in the new automated process, rather than the hours and hours you are currently spending carrying out the same tasks manually.

If you choose to manage the automated steps yourself you will only have to troubleshoot if there is an issue - or alternatively you can ask me for ad-hoc support as required.

How much does it cost?

In short, each client is very different and I will provide a bespoke quote after an initial conversation.

The cost will depend on a few things, such as how many steps there are in the process, etc etc

More simple automations such as calendar bookings and invoicing/payment automations cost in the region of £250.

More complex automations - such as a lengthy, multiple-step client onboarding processes - cost in the region of £2,000.

As mentioned, implementing any kind of automation into your business is extremely likely to go on to save you hours and £hundreds every single week.

If you're ready to ditch the long, drawn-out processes and admin and want me to sprinkle some automation sparkle over your business, simply DM me for a quick chat. I'll ask you a couple of quick questions, and if your business is a good fit, we can set up a Zoom call and get started within a couple of days!