

5 LESSONS OF AUTOMATION



GREG JENKINS
FOUNDER AND EVERYTHING ELSE



THANKS FOR REQUESTING THE FIVE LESSONS OF AUTOMATION

I've been around Infusionsoft and marketing automation for a few years now, and I've assembled a list of some of most valuable lessons I've learned along the way.

I'm more than happy to share them with you with the hopes that it'll save you some time, or make your life easier. So, without further ado:



1 KEEP LIFECYCLE MARKETING AT THE CORE

Most people know the concept of Lifecycle Marketing. First you attract the leads, then you nurture them, convert them to customers, and deliver on whatever they bought, right? Pretty straightforward. This is the graphic that Infusionsoft uses:



Let me tell you why this lesson is so valuable. It's NOT about remembering to do all three of these things. I don't think anyone looks at this and goes "Oh, I forgot to sell!"

The value of Lifecycle Marketing is designing the WHOLE experience you want your customer to have while considering every other aspect of their path.

The key element here is that it is INTENTIONAL. Your prospects and customers experience something that you designed deliberately for them, NOT something that just happened arbitrarily.

Each touch point takes into consideration what you would like them to do next, as well as what they have done to get to that point.

So, sit down and map out your perfect customer lifecycle. How do they find out about you? What happens next? What is the offer for them? What happens if they buy? What happens if they don't?

Then, build this ideal experience, and funnel prospects through it over and over. Once you have it live, you'll start gathering customer sentiment, and key performance metrics so that you can begin to refine it and improve on your first draft.

The problem most businesses have is that as their business grows and changes, they forget to go back, revisit, and update their ideal customer journey.

PRO-TIP

Take a half day once a quarter, and a full day twice a year, to revisit and polish your intended customer experience.



2 BRING A PERSONALITY

This one isn't always as straightforward as it sounds. I've noticed that a lot of entrepreneurs have a tendency to hide behind their brand.

They create their company, and then they send emails from the company email address, they send tweets from the company twitter, and they hide behind their logo, and don't even let people learn their name.

I know you're proud of your brand. Whether you started the company, or just work for it, there's a pretty good chance you feel good about what you're doing. People want to know who you are.

We live in the most connected day and age there has ever been. Between social media, smart phones, and google; it's easier than ever to learn about and connect with people.

This matters because people want to do business with people. We want to know who we are doing business with, we want to know their name, what they look like and what they're into.

We feel good about doing business with someone when we know that they have a family, or a dog, or just that they also like to travel.



1 Use a headshot in your signature. Even if you are self conscious about your weight, or your glasses, or not having a beard like mine; use a headshot. People want to see you.

2 Send emails from a person. Nothing says "I don't care" like sending emails from noreply@ a similar address. Make yourself available for your audience.

3 Write the way that you talk. It may feel weird, because you're writing, you're not talking, but make an effort to write the way you would actually speak. You want people to be able to hear your voice through your writing, it'll help dramatically with forging a connection. One way to test this is to read your email out loud to yourself before you send it and see if it sounds natural.

So, there it is. Find ways to inject personality into your brand. People love doing business with people. They want to know that you're real, and that you care.



Yes, you can build a really robust, complex, comprehensive marketing funnel, but in the time that it'll take to complete it, you could have launched something much simpler that works nearly as well.

I've found that if you start by building something that is super complicated, and that takes a while to get launched, you sometimes get hung up on the different steps, like on integrating two platforms, on waiting for a third party to create the supporting materials, and on and on and on.

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graph LR
    A[Website] --> B[Leave a Testimonial (LP)]
    B --> C[Thanks and Notify Greg]
    C --> D[Testimonial Received]
  
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[illegible]

Sound simplicity beats sexy complexity any day of the week. Focus first on earning an ROI with your marketing automation, and save the advanced strategies for the second and third iteration.



4 MULTIPLY YOURSELF

I've worked with hundreds of entrepreneurs who approach automation with the mindset that they're removing themselves from their business.

And, this may technically be true, but I'd challenge that thinking. Do you really want less of you in your business? Or in your role? You're probably really good at what you do, and if we remove you from it, then it'll be less impactful, and it'll feel less like you.

Then it goes back to lesson number one, it won't be delivering the type of experience you want to create for your customers

So, instead of removing you from your business. Think about automation as a way to multiply yourself. It's not doing things instead of you, it's doing exactly what you WOULD do if you had the time.

Automation should create for every single customer the experience that you'd create if they were your only customer.

Write that down. Tweet it . That's good stuff right there.



If you think about automation as an extension of yourself, as just a way for there to be more of you, instead of less to do, it can help you get to a really important mindset about the whole thing.



5^{BE} VALUABLE

Multiplying yourself only gets you so far. If you aren't providing value, then showing up a lot more frequently will probably just irritate me.

The frequency with which you contact your prospects, should be proportionate to the value you provide.

This means that you should make a deliberate effort to show up and be valuable. If each time you contact your prospects you are asking for a sale, they'll how self-serving that is, and it'll push them away.

But, if you're making my life better, by delivering valuable content, or fun videos, or sharing interesting resources - well, you can contact me as regularly as you'd like.

This lesson is important because entrepreneurs often times feel so proud of their product, or service, or course, that we forget to fully explain how this benefits the consumer. We jump right to "Man, you're going to love this, click here to get started!" and we bypass the whole trust building part.

If you show up and provide value on a regular basis, you'll develop the trust it takes to make a request like that. Then, when you do ask something of your audience, they'll be much more receptive because you've conditioned them to see you as a resource, as an expert.

These lessons are the accumulation of helping thousands of entrepreneurs through their introduction to marketing automation.

Understanding these concepts at a high level is the first step, and the next phase is implementing them in your business.



- 1 Keep Lifecycle Marketing at the Core
- 2 Bring a Personality
- 3 Simple Works
- 4 Multiple Yourself
- 5 Be Valuable



ABOUT THE AUTHOR

Greg is the founder of Monkeypod Marketing. He's an experienced speaker, trainer, and marketing automation expert.

His love affair with small business started in Lansing, Michigan, where he owned and operated a business installing and servicing draft beer dispense systems.

After moving to Arizona, he spent three years helping Small Business grow. While advancing through several roles at Infusionsoft, he began as a consultant working one-on-one with hundreds of small businesses before moving into a live-training role, where he was able to travel the world teaching small business marketing automation strategies as the lead trainer, and ultimately the curriculum developer for Infusionsoft's most popular education event, Infusionsoft University. The concept of Monkeypod Marketing was born out of Greg's insatiable desire to find new ways to elevate the small business community.

Greg's passion for entrepreneurship comes from growing up in a small business family, where he developed appreciation for the commitment and ambition that fuel small businesses around the world. In his free time he enjoys travel, hiking, disc golf and writing e-books, apparently.



If you have any questions about the content in this ebook, please don't hesitate to reach out to us via [email](#) or on [twitter](#).

Automation works, time and time again. Take the time to understand it so that you can reap the benefits!

GOOD LUCK!

GREG JENKINS
Founder & Small Business Expert
@Infusiongreg
www.monkeypodmarketing.com