

HOW-TO GUIDE:

Automate Your Small Business

Let tech do the work so you can get more time back in your day.



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Automate Your Small Business

01 Streamline Your Operations

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Give yourself the ultimate gift: Time to do what you love.

You started your business because you had a passion for helping your customers. But now you seem to be spending all your time running the business. Scheduling staff, setting up appointments, handling billing ... the list seems endless.

While essential to your success, these responsibilities eat into the time you have available for actually doing the work you love. Rushing through these tasks only makes things worse — increasing mistakes and slowing you down even more.

It doesn't have to be this way. Today, technology can handle much of the busy work for you by automating these repetitive chores.

Give yourself the ultimate gift — more time — so you can get back to focusing on what got you into business in the first place.

Thryv provides small business owners like you with tools to automate much of the time-consuming administration a successful business requires.

This guide will show you how technology can help you create operational efficiencies to:

- ✓ Keep your businesses running smoothly
- ✓ Provide your customers with outstanding service
- ✓ Allow your business to grow

01 Streamline Operations

When running your business, managing all the details is just part of the process — especially in the beginning. But as your business has grown, so has the busywork. If you're spending more time on administration and less on serving your customers, you're not alone.

A recent survey reported by the New York Post showed that nearly a quarter of small business owners dedicate five to 10 hours on administrative tasks alone every week.

Use technology to automate these tasks and streamline your operations, so you can focus on serving your customers and growing your business.

“ 24% *of small business owners spend five to 10 hours a week on administrative tasks alone.*
~Zapierh



Increase Your Productivity By Juggling Less

As your business grows, organization becomes more difficult — and more critical. Juggling employee schedules, managing appointments, responding to messages, following up on estimates and billing are all equally crucial.

However, very few people can multitask effectively and trying to do so only impairs your other work, increases the risk of making errors and adds to your stress.

So how do you stop the stress and get on top of your productivity? Use technology solutions to automate these tasks.

Imagine being able to manage appointments, send reminders, receive and organize messages all from your smartphone, wherever and whenever you need to. Make running your business less about (unsuccessfully) juggling multiple tasks and more about harnessing the efficiencies technology can deliver.

In Synch: All Day, Every Day

Thryv user since 2018: Unicorn Air & Heat

“We wanted to start helping people,” explains Mike Tambs co-owner of Unicorn Air & Heat, when asked why he and partner Chris Palmer started the company. Mike and Chris had years of experience as technicians, but running a business involved taking on many administrative tasks.



They wanted to focus on offering customers honest rates and fantastic customer service. Keeping track of all the details was key to that.

“As a technician it was a bit of a jump to have to keep everything organized,” Mike explains about the back end of running the business. They needed to manage their combined schedule and jobs while ensuring they could communicate with each other in real-time.

It had to be seamless, so each owner was in the loop about what they were doing for their customers. They knew technology was a leap they had to take to keep things organized.



Today, Mike and Chris can run their entire business from their phones. Thryv's software solution has given them the tools to:

- Streamline scheduling by combining everything they do each day in one calendar view.
- Save valuable time with online invoices and payments.
- Keep them organized while on the go with the mobile app.

“The calendar keeps all of my appointments organized and helps me manage my day,” allowing Mike to easily see where techs are heading, all day, every day.

Best of all, Mike says, the system was easy to learn, with no down time. “Everyone at Thryv was positive and so helpful,” he says. “They were with us all the way, making sure we had what we needed.”

“Thryv has made running my business a whole lot easier.”

Get Estimates Out Faster and Automate Scheduling

Are you still creating estimates and managing appointments manually? Moving away from the overflowing file cabinets and paper calendars will save you headaches, and help you better serve your customers.

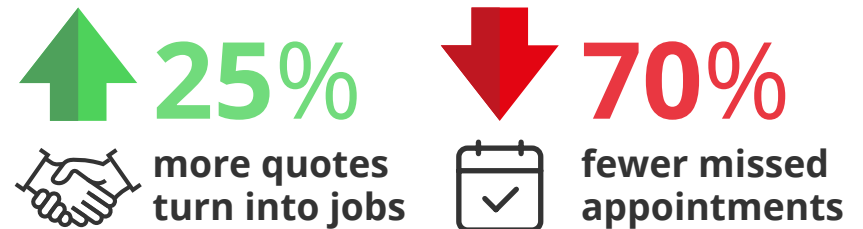
Automatically building and delivering estimates electronically means less time spent on the phone. You're likely to get the estimates out faster and can even allow customers to approve them on their mobile devices, streamlining the process for them and you.

Greg Brittain, from All American Door in Fullerton, CA, has seen that first-hand. "My ability to quickly provide a quote has meant that 25% more quotes turn into jobs," he says.

Greg also decided to automate his appointment scheduling. Now, when a customer accepts his estimate and schedules an appointment, the system automatically updates Greg's calendar and reminds the customer of the appointment, saving Greg time and eliminating hassles.

Since choosing to automate scheduling, his total missed appointments have decreased by more than 70%, thanks to automated reminders and easy two-way communication.

And with all their customer information in one place, Greg and his staff can answer customer questions from anywhere, improving the customer experience and satisfaction.



Reduce Invoicing Hassles

You've won the business, helped the customer, and now it's time to get paid. For many business owners, invoicing is one of their least favorite tasks. It can be tedious and repetitive and disrupt your day.

Automation is all about removing these manual tasks from your plate so you can focus on the important work. The benefits of automating your invoicing are clear:

- **Decreased Processing Costs.** Automating your invoicing can save you between 60% and 80% over manual processing, and free up staff from having to create and send out invoices.
- **Fewer Errors.** No more accidental extra zeros or transposed numbers. Automation removes manual data entry, resulting in fewer errors.
- **Reduced Late Payments.** Automated text or email reminders make it easier for your customers to pay on time. It also frees you from spending time chasing down payments.
- **Consistency and Completeness.** Automated invoices always include critical elements such as when payments are due, and how payments can be made. And they're always sent out in a timely manner.
- **Improved Customer Relationships.** Digital invoices mean all your billing information — past and present — is available in a few clicks, making it easier to answer customer questions about current or past work.

67% of consumers prefer email or text receipts to paper. ~Thryv/Payments Dive

Get paid faster. Offer easy pay options online.

When it comes to getting paid faster, flexibility is the key. Make it easier for customers to pay you, and you'll find you're spending less time waiting to get paid. An automated online payment system puts convenience in your customers' hands.

Let them pay their way

Let customers choose their payment method: Credit cards, PayPal or Apple Pay might make some customers happy. Others may want to set up an automated clearing house (ACH) payment to transfer money directly from a checking or savings account to your business. Offer all the options you can.

Offer incentives for early payments

Penalties for late payment are an important part of getting paid quickly. But getting paid before deadlines is even better. You can do this by offering positive incentives, such as discounts or rewards for early or on-time payments.

Payment plans are a plus for big-ticket items

Payment plans with scheduled automatic payments can help you win customers who might have otherwise gone without the service because of the cost.



02 Improve Customer Relations

Good customer relations are the key to business success. But too many small business owners find the challenges of running a business get in the way of maintaining strong customer relationships. Honestly, though, it doesn't take much to keep your customers happy and coming back.

Your customers lead busy lives, and they value convenience. You'll win their business and their loyalty by providing it whenever and however you can.

Automation can be a lifesaver here. Not only can it help you provide your customers with the convenience they want, it does so while removing tedious tasks from your to-do list. And that can give you more time to provide the outstanding customer service that has made your business a success.



“*Health & wellness are the most popular services for online booking.*
~TimeCenter.com

Provide Convenient Scheduling Online

While most people carry a phone with them everywhere, your customers probably aren't using it to call you. Instead, they expect your business to have an easy process for scheduling appointments that is available whenever they are, 24 hours a day, 7 days a week. They also want you to help them keep track of appointments by sending reminders.

Online booking offers customers the convenience of seeing when appointments are available in real time, and which openings fit their schedules. No more playing phone tag to find a time that works for both you and them.

If they discover they need to cancel or reschedule an appointment, they can do so with a click of a button. As a bonus for you, if they do cancel, that time immediately becomes available in the system for someone else to schedule.

By adding a booking button to your website, you're empowering your customers. You're also eliminating extra steps spent adding appointments to your business's calendar. With online booking, that happens automatically. You also can connect bookings with your digital payment options, meaning you might even get paid more quickly.

It's an easy win-win for both you and your customers.

It's good for you, too

Having an online booking system is convenient for you as well. The best appointment booking software solutions link to your business's calendar and automatically populate it.

No more lost revenue from cancelled appointments. If a customer cancels, that spot immediately becomes available online for others.

Make missed appointments a thing of the past. With automated reminders, your customers are less likely to forget their appointments, and you'll have fewer no-shows.

Make scheduling staff easier. With everyone's appointments consolidated into one calendar, you'll gain full visibility into who's doing what, and when. You'll also be able to judge when you're going to be busy or slow and adjust staff schedules accordingly.

Retain Customers with Personalized Marketing

Your best customer is the one you already have. It costs a lot more to gain a new customer than to keep an existing one. A good business automation platform will place as much emphasis on retaining customers as it does on finding new ones.

Obviously, the most important step to retaining customers is providing outstanding service. If you've freed up your time by automating repetitive, time-consuming tasks, you're already at an advantage. But you can easily take it a step further by deepening your relationships with your customers and personalizing your marketing.

Saying “Thank You” Yields Dividends

No matter how digital the world becomes, people still value “human” connections. Following up a job with a simple thank you message makes your customers feel valued, and more likely to use you again. They'll also be more likely to recommend you to a friend or leave a review.

You can easily build this practice into your appointment booking system so that it automatically sends customers a thank you note and asks for a review. To really turn this word-of-mouth marketing into a powerful tool, be sure to follow up every review with a simple response.

Deepen Connections, Build Relationships

Use marketing automation to easily acknowledge birthdays or the anniversary of the date they first became a customer with a note and a special offer. Reward customers with discounts or special promotions to thank them for their loyalty. Send them content that inspires or educates them.

When you focus on a relationship, instead of just a transaction, you demonstrate you care about your customer as a person and are invested in their future well-being. That way, when the time comes for them to choose a service provider, you've stacked the odds in your favor.

Keep Employees Engaged for Better Service

This might be obvious, but a customer's experience with your company is all about the interactions they have. The people on the front lines of those interactions ultimately influence your customers' opinions, and their willingness to work with you again.

When you find ways to automate the tedious tasks, you're also making it much easier for your employees to do their jobs. Online estimates and invoicing? Check. Project and job tracking? Check. Easy appointment setting, reminders and scheduling? Check, check and check.

Minimizing busywork and paper shuffling demonstrates you care about your employees' experience. And when your employees feel valued, they'll make your customers feel valued as well. A customer retention win-win.

“Companies that actively engage employees have customer loyalty rates 233% higher than those that don't. ~Verint



Be Sure You're Getting the Message

To keep your customers happy, make sure they are being heard. Whether it relates to their communication preferences or responding to feedback they give you, communicating well with your customers demonstrates respect.

Choose communication tools that automatically sync all of your inboxes into one, so you have one place to check for messages from:

- Email
- Facebook Messages
- Instagram Direct Messages
- Webchat
- Text messages
- Gmail
- Google's Business Messages

First, make it easier to communicate on their terms.

Ask them how they prefer to receive communications — whether snail mail, text, email or social media. Offering these options doesn't have to be overwhelming:

A centralized inbox program will automatically bring all your customers' electronic communications together into a single inbox — as if it were all coming from the same place.

It's easier for them, and faster for you because everything is organized in one place. And you're far less likely to miss something important.

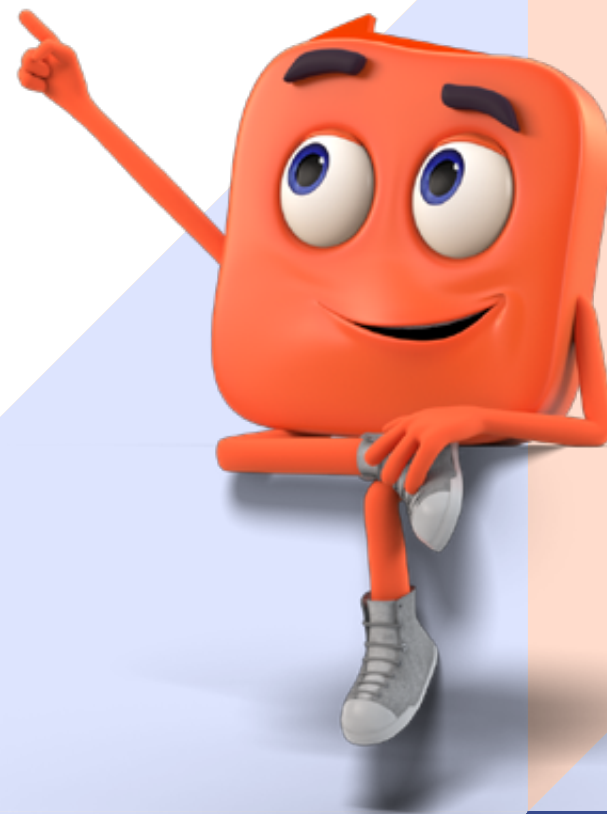
Second, make sure you stay top of mind. A good system will let you set up reminders to follow up by text or email on future dates, so you can keep in touch — even when things get busy. This helps you stay top of mind when your customers are ready to buy again.

03 Plant the Seeds for Growth

Helping your business grow. No matter how successful you are today, this probably remains a goal. While you may do some marketing for your business, chances are you've probably asked yourself, "How do I make my marketing better?" Quickly followed by, "When do I have time to think about marketing?"

Technology can provide an answer to both these questions.

“ *The average return on investment for marketing automation is \$5.44 per dollar spent.*
~Nucleus Research



First, Get Seriously Proactive

Before you spend time trying to win new customers, focus on your current customers. They're the ones making purchases, spreading the word, and giving you feedback on what is and isn't working. If you aren't regularly touching base with them, they may feel forgotten.

Don't open the door for the competition to swoop in. Keep your existing customers at the front of your marketing plan. One of the best ways to do that? Stay one step ahead of their needs. Build an email campaign that will get customers to book services online before they need you.

- Remind them that it's been several months since their last hair appointment and ask if they'd like to schedule a root touch up.
- Remind them that winter is coming, and they should have their furnace tuned up to ensure they stay warm when the temperatures drop.
- Provide tips to keep their yard looking good this year and offer a coupon for a free consultation.

If you find that staying in touch is tough because your primary focus is running a business, consider using business automation software. It can let you tag customers by the services they've purchased and use those tags to schedule personalized reminders to go out in the future, so you can set it and forget it.

Your existing customers are the foundation of your reputation and your business. Make sure they feel valued and remembered.

Helpful Tip:

Tag the services each customer has purchased so you can automatically upsell additional services.

Manage Online Presence

Google, Facebook, Yelp ... there are dozens of online listing sites and directories. These are great sources of leads, consumer reviews and referral traffic. In fact, they're critical to attracting new customers — 75% of all new business comes from online sources.

But who has the time to create and maintain listings on all these sites? Thanks to the power of automation, you do. Thryv's all-in-one small business management platform allows you to upload your business profile once and load it across more than 40 top sites. It also can help you build and maintain a website, giving your business a home on the web.

Is creating an online presence worth the effort? Tom Quest, at SewerQuest in Columbus, Ohio, thinks so. Before discovering Thryv's automation tools, Tom managed SewerQuest manually. Potential clients had no way to find SewerQuest online, and Tom had no awareness of the online reviews people were leaving.

Today, SewerQuest has a robust presence online — its Google Business Profile includes a 4.9 star rating with more than 200 reviews. Tom can focus on continuing to grow his business and his online presence because Thryv automates tasks to give him more time back in his day.

“ *Businesses that show up in **Google's Map Pack** get about **44% of the total clicks**. When your Google Business Profile is fully complete, you improve your chances of appearing in local search results.* ”

Automate Your Marketing

One of the benefits of using an automated marketing system is that it allows you to understand the needs of your customers and identify the most effective way to reach them.

Furthermore, you'll be able to segment your customers and prospects and understand which group brings more money. And, when you set a marketing plan in motion, and the system will handle the rest.

Create an email marketing strategy that works

Get in touch with new customers and keep current customers in the loop by developing an email marketing strategy. From offering coupons, sending updates on product restocks or even just reminders on upcoming appointments — email marketing can keep your customers engaged and help you attract new ones.



Tips for successful email marketing

- ✓ Use the information in your automated marketing or CRM system to intelligently segment your customers and prospects by their interests and stage in the buying process.
- ✓ Get creative with your subject lines but be sure they relate to the email content.
- ✓ Add offers to each email to encourage prospects to take the next step.
- ✓ Showcase your expertise by providing links to blog posts or sharing articles related to your work.
- ✓ Include an engaging call to action button, such as "Read now" or "Call us."
- ✓ Track what resonates with your audience and what doesn't.

Invite Repeat Business

Gaining repeat customers could be as simple as reaching out after a set time to invite customers to make another appointment. You could do this using a time consuming one-email-at-a-time campaign, or you could automate the process and use your CRM system to reach out for a time-based repeat service on your behalf.

Cross-Sell Related Products or Services

Are your customers aware of all the products and services you offer? Segment your customer list by the services used and create a campaign to introduce these customers to other things your company offers.

Your CRM system can help provide insight into how customers prefer to interact with your business — text messages, email or social media — and make it easy to reach them using the method they prefer.

Helpful Tip:

After a service is complete, set up an automatic email or text asking happy customers to refer your business to their friends and family. Offer a discount for each referral they bring in.

Reach Your Audience On Social Media

Social media is a great place to connect with your clients and grow your audience. You don't need to master every platform to be successful. Pick one or two platforms your customers are most likely to use, and share images, videos and articles.

The key is to post content regularly, so you remain top of mind.

Fortunately, you don't need to spend your entire day scrolling through Facebook or watching videos on TikTok trying to catch your customers online. Marketing automation and social media scheduling software can help you get the word out with less work.

These systems allow you to create multiple posts at once, and schedule them to appear online when your customers are most likely to see them.

Taking advantage of smart social media scheduling can help your business thrive without sacrificing your time.

Get creative and increase engagement

Ramp up your followers' engagement with your company by getting creative with your social media campaigns. For example, a social media contest could help you generate a high volume of fresh content without you having to do much heavy lifting.

Contests work best on whichever platform you have the most followers. Here are some ideas to get you thinking:

- Your landscaping business could ask customers to share pictures of their first flowers to bloom in spring. Offer free bulbs to the person whose photo gets the most likes.
- Ask your pet-service clients to share pictures of their pets in costume for Halloween. Most creative wins a free grooming session.
- Post a funny photo related to your business and ask for caption suggestions. The winner gets a free consultation.

Post special offers and discounts

Reward your followers by offering special offers or discounts through your social media platforms. You can run these in conjunction with email marketing campaigns, or as independent offers.

Be sure to include a link to your company website, so people can print a coupon or schedule an appointment using the discount code you've provided.

Don't be afraid to boost your posts

Speaking of offers and discounts, don't be afraid of paying to boost promotions you think will be especially appealing to your target consumers.

Boosting posts allows you to pay to reach a larger audience than your post typically would. A little boost can sometimes go a long way when it's paired with an offer that's likely to have a broad appeal.

Prospect With Ease

One of the easiest ways to prospect is to get referrals from your existing customers. Satisfied customers can be your best salespeople, and a personal recommendation carries more weight than any amount of marketing could.

The best way to get these referrals is to ask for them. Use your automated marketing system to send your customers a little nudge to talk to their friends and family about you. Create a rewards program and offer discounts on future services, gift cards to local businesses, or Amazon credit to encourage referrals.

A solid referral program can help generate new leads for years to come without having to do much besides continuing to provide great service. Just input the details, set a schedule for reminders, and let the software do the rest.

Another great way to gain new customers is by targeting prospects who've shown an interest in your business but haven't booked an appointment yet. These prospects may have responded to a marketing campaign, discovered you by browsing your website, or filled out a form requesting more information.

Automation can help you maintain contact with these prospects and provide them with the information or incentives they need to move from browsing to buying.

91% of Millennials may buy a product if it has been recommended by a friend. ~Annex Cloud

Break Free From Busyness

As a small business owner, you have a lot to manage. Thryv can help you break free from the busy work by providing you with the tools to automate repetitive tasks, minimize errors, and consolidate your information into one easy-to-access system online.

Give yourself the gift of time, so you can focus on what matters more — serving your customers and helping your business grow.

[Schedule a free demo today](#)



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