Save Time, Stress Less:

How to Automate
Your Small Business

Intro–duction

Automation has come a long way in the past decade. Driverless cars are moving passengers from A to B. Robot waiters are taking dinner orders. And delivery drones are about to go from beta to commonplace.

While droids are a long way from taking over the back office, automation is already making life easier for entrepreneurs. If you run a small business, it's possible to leverage a collection of apps, tools, and services, and put menial tasks on autopilot—so you can reclaim your time, and focus exclusively on the areas of your business that matter most.

Until you have a cyborg sidekick to help you take on the world (or at the very least, help you deal with time-sucking admin), reject the idea that your workload should increase as your business expands. Use the automation tips and tools listed in this guide, and as your business grows, you'll work—and perhaps even stress—less.

Email

Adopt One-Click Replies

If you write the same reply to different customers over and over again, use Canned Responses. The free Gmail feature lets you create and send template replies at the click of a few buttons.

"**The problem is in trying to make email do everything when it's not particularly good at anything.**"

PHIL KNIGHT

Eliminate Low Priority Emails

Sanebox scans your inbox and compiles all nonurgent emails into a weekly or monthly digest, reducing email influx to non-overwhelming levels.

Forget About "Inbox Zero"

If daily email decluttering isn't your idea of a good time, quit worrying about it altogether. Evidence suggests that you'll save time and energy on email-related tasks if you don't bother organizing your inbox at all.

Financial Admin

Outsource Your Bookkeeping

It's no secret: the majority of entrepreneurs loathe doing their own bookkeeping. If the task is eating up your time, upgrade to Bench (full disclosure: that's us). Unlike DIY bookkeeping software, Bench gives you a team of bookkeepers—who do your books, so you don't have to—and simple, elegant software to track your finances. You can monitor your business's financial health, message your bookkeeping team, and download your financial statements any time via your Bench account.
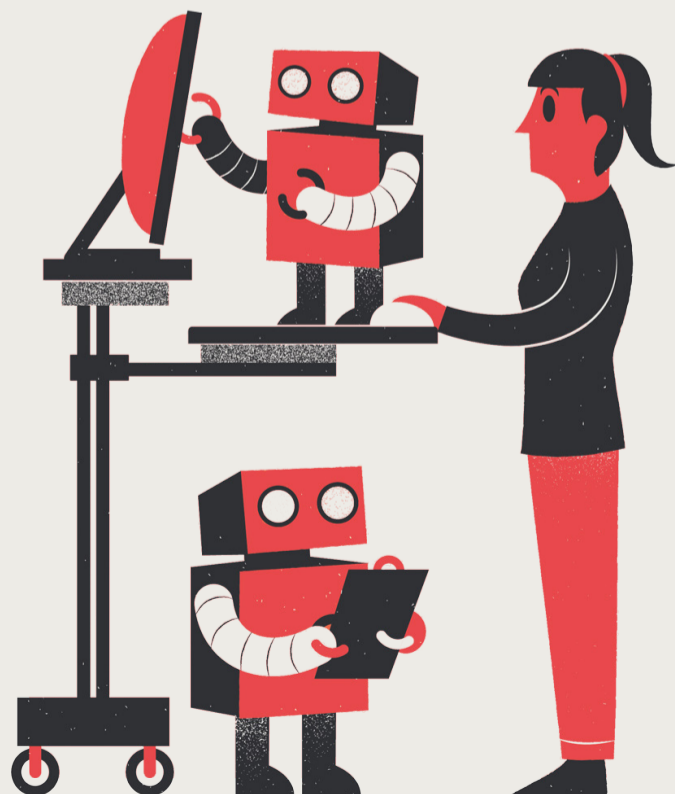
Track Expenses Efficiently

Use Expensify to track business expenditure, and never lose a receipt again. Your employees can also use the app to report their own expenses, while administrator controls allow you to specify which ones require approval—so nobody has to wait to be reimbursed for Post-It notes.

Work With a Virtual Bookkeeper

Charge by the hour? Don't waste precious time creating and chasing invoices. Freshbooks will track your project work and expenses, and integrate them into polished, professional invoices clients can view online. The app also embeds credit card payment options within invoices, so you can collect fees immediately.

Switch Over to Painless Payroll

You probably didn't start a business because you had a passion for payroll. Gusto automates much of the legwork involved in managing payroll and employee benefits. The service sends out bank transfers and pay stubs on a schedule set by you; your employees can track their earnings, benefits, and worker's comp, and collect tax forms via their personal accounts in app.

Back Office Admin

Avoid the Phone Without Missing a Call

Hire a virtual receptionist and you'll always have someone available to answer the phone, even when you're off-duty. Conversational and Ruby Receptionist will forward calls to extensions and voicemail, and set appointments on your behalf. Both services can answer to numbers registered in your local area.

Auto-Arrange Your Travel Itinerary

Business travel can be great for business. Arranging it, though? Not so much. Next time you head away for work, forward your hotel, flight, and vehicle bookings to TripIt. The app organizes travel details into a complete itinerary which you can access from your smart phone.

Use One Password to Rule Them All

When online security is a priority, so much hinges on a row of asterisks. 1Password and Dashlane generate and store secure passwords for every service you use under a single key. 1Password for Teams can help you implement password security protocol for every employee.

Organize Your Team in the Cloud

If you juggle employee availability every time you write the roster, save time with WhenIWork. The app lets you create a central, online team schedule that employees can use to report their availability and clock in to their shifts.

Marketing

Monitor Online Mentions

List your business's name in Google Alerts, and you'll receive an email every time someone mentions it on the internet. Alerts is free and simple to use. The only drawback? The daily updates can clutter your inbox.

Set and Forget Your Social Media

If you spend too much time writing and scheduling social media posts, use Edgar. The app stores your social posts in an online library, posting (and reusing) your best content on a schedule that works for your audience.

Crack Your Competitor's Strategy

SEMRush helps you peek inside your competitor's online marketing strategy. Use the app to view all pages of any website, reveal ad strategies and budgets, and identify the keywords your competitors are targeting to grow their business.

Find Your Competitor's Best Content

Want to know how your competitors are doing so well on social media? Enter any website into BuzzSumo, and the tool will return a list of the website's most shared pages.

"There are lots of good reasons to abandon a project. Having a little competition is not one of them. "

SETH GODIN

Gather Free Audience Insights

Want to get familiar with your customer's thought process? Enter a search term or topic—your industry, your services, the name of a product you're planning to launch—and Answer the Public will show you the keywords people use when they search for it online.

Force Apps to Work Together

"If This, Then That" (aka IFTTT) integrates apps and services that don't normally mesh well. IFTTT recipes can speed up almost every marketing task, from social posting to e-newsletter creation.

Recruiting

Leverage Niche Job Boards

Post a job on a major hiring platform and you'll be hit with a tsunami of applications in seconds. Skip the paper tidal wave and advertise new openings on niche job boards. WeWorkRemotely for remote programmers. Slack at Work for tech talent. Designer News for designers and developers. Copyhackers For Hire for writers and editors. And so on. You may get fewer applicants, but the quality of the talent is usually a step up from larger, generalized job networks.

"**The secret to successful hiring is this: look for the people who want to change the world.**"

MARC BENIOFF

Use Dedicated Recruiting Software

If you hire employees frequently, and you can't see the forest for the pile of CVs, Jazz HR and Greenhouse streamline the entire recruitment process from a centralized online dashboard.

Expedite Employee Onboarding

When a new employee joins your business, reduce the time you spend on the training front with Trainual. The platform lets you create an online training course for your team, saving you from having to answer repeat questions when a new hire joins your business.

Sales

Bring Cold Leads Back From the Dead

The "tracking response" feature in Boomerang for Gmail salvages leads that go quiet. If a prospective customer doesn't reply, Boomerang will return the conversation to your inbox and remind you to follow up.

" **I have never worked a day in my life without selling. If I believe in something, I sell it, and I sell it hard.** "

ESTÉE LAUDER

See Who's Opening Your Emails

Hubspot's email tracking feature alerts you every time a recipient opens your email. If a prospect re-opens your email pitch long after you first sent it, the app will nudge you—prompting you to reach out again and ask the lead if they're ready to purchase your product or service.

Book Meetings With a Single Click

Eliminate the back-and-forth involved in finding a meeting time with ScheduleOnce or Calendly. Both apps display your calendar availability and allow clients to schedule meetings with you at the click of a button.
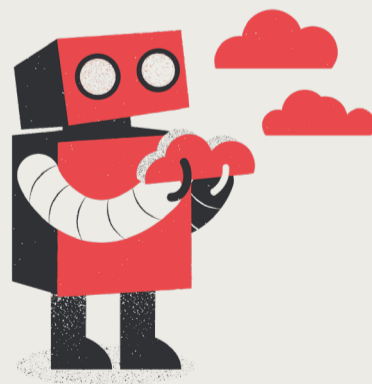
Support

Get Help From Help Desk Software

Having more customers can increase profit. It can also increase the demand for customer support. Don't let the task bury you. Help Scout lets you set up a team help desk and install a searchable knowledge base on your website. Giving customers easy access to your team and searchable support documents will make frequently asked questions a little less frequent.

Chat With Customers in Real Time

LiveAgent is comparable to Help Scout, but includes support for live chat on your company's website.

Shopify's integration with Facebook Messenger connects you one-on-one with customers, and allows order tracking and updates, through Messenger.

Leave It to the Algorithm

Don't have the time or resources to field FAQs? Intercom's Educate tool lets you set up a question and answer knowledge base, and then directs users to your customer service staff when an article doesn't fully answer their questions. The tool also uses to algorithms to determine what kind of help content you should write in the future, based on what users are asking today.

> " **Customers may forget what you said but they'll never forget how you made them feel.** "

Small business owners who use Bench save an average of eight hours a month.

With Bench, you get a team of professional bookkeepers—who do your books, so you don't have to—and simple, elegant software to track your financials.

Refer friends.
Get $150 and free bookkeeping.

REFER A FRIEND