



# 10 AUTOMATION SECRETS: REGAIN TIME & SCALE YOUR BUSINESS WITH EVERY CLIENT INTERACTION

Dear Business Owner,

Time is not just money—it's everything. It is your most valuable asset.

Unlike other resources, it's irrevocably finite. Once spent, it cannot be replenished or renewed, making its efficient management critical for business success.

Wasted time is not just a missed opportunity - it's a cost that can't be recouped, a potential opportunity left unexplored, or a client connection not made.

This is where the power of automation becomes a game changer.

Automation serves as a lever for multiplying your effectiveness, allowing you to accomplish more with the time you have.

It takes over repetitive, mundane, time-consuming tasks, ensuring they are completed with precision and consistency, freeing you to invest in high-value activities that require your unique expertise and creativity.

By implementing the strategies outlined in this free guide:

**10 Automation Secrets: Regain Time & Scale Your Business At Every Client Touchpoint** your business will begin to operate more efficiently, minimize human errors, and elevate your client experience.

All while scaling.

It's time to transform your business with the power of automation.

Cheers!

Dorothy Vernon-Brown

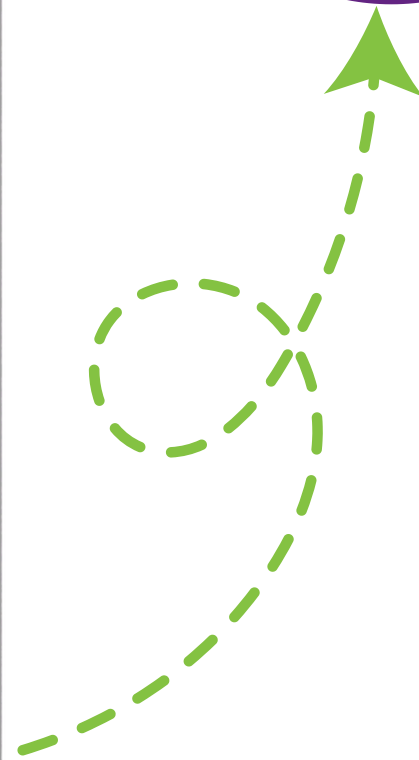
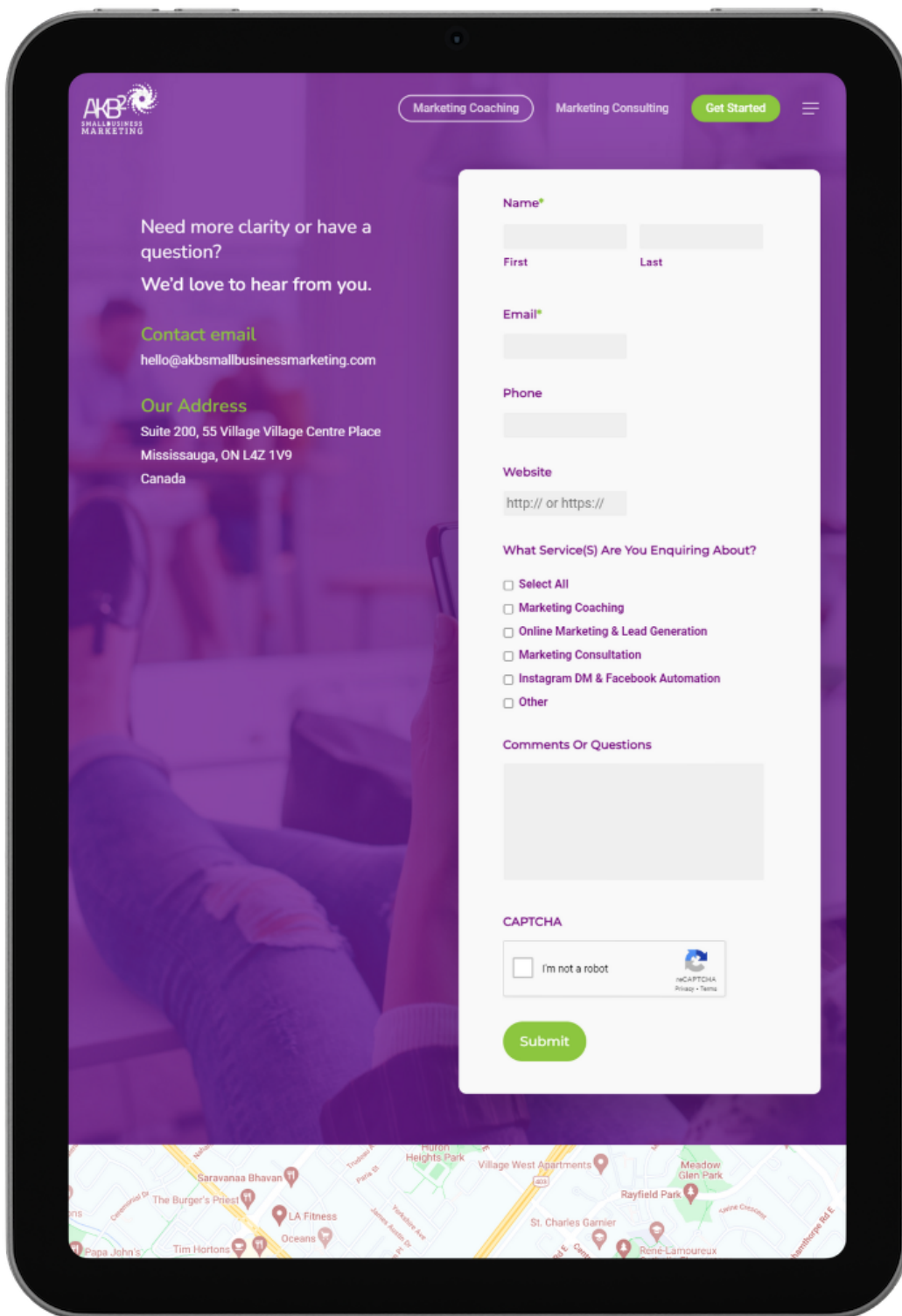
**10 AUTOMATION SECRETS:  
REGAIN TIME & SCALE YOUR  
BUSINESS WITH EVERY  
CLIENT INTERACTION**



# 1

## Lead Capture and Welcome Sequence




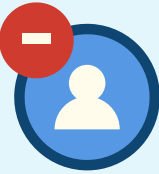

When a visitor subscribes to a newsletter, automation can immediately send a welcome email series that introduces your company and provides valuable content.



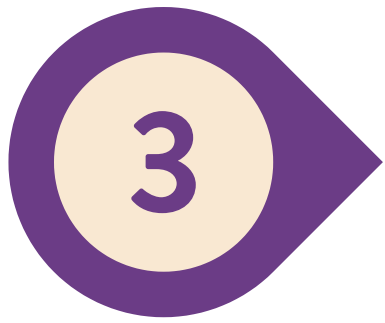
# 2

## Lead Qualification Automation

Use CRM software to automatically score leads based on their interaction with your content and website, so you focus on the most promising prospects.

Matches Right-Fit Profile	Downloads Lead Magnet	Opens Email	Registers for Masterclass
+20 Points	+10 Points	+5 Points	+15 Points
			
Visits Website Homepage	Revenue Falls Below Right-Fit Profile	Unsubscribes from Email	Email Bounces
+5 Points	-20 Points	-5 Points	-5 Points
			





## Re-engagement of Inactive Clients

If a client hasn't interacted with you for a set period (e.g., 6 months), an automated email can be sent to re-engage them with a special offer or feedback on why they disengaged.

**Subject:** *[Exclusive Offer Inside] We Miss You! ❤️*

**Body:**

*Hey there [First Name],*

*We've noticed it's been a while since we last connected, and honestly, we miss having you around. Our community isn't quite the same without you.*

*As a token of how much we value our relationship, we're extending a special offer just for you – enjoy a 20% discount on your next purchase or service with us!*

*Simply use the code WELCOMEBACK23 at checkout. This is our way of saying thanks for being a part of our journey.*

*We would also love to hear from you. If there's anything we can improve or if there's a reason you've been away, your feedback is invaluable.*

*Please help us elevate your experience by sharing your thoughts.*

*This special offer is valid until [expiry date].*

*Looking forward to welcoming you back with open arms!*

*Cheers!*

*[Your Name]*

*[Company Name]*

# 4

## Post-Purchase Follow-Up

After a client makes a purchase, automation can trigger a thank-you email, followed by a series of emails that provide additional value, special offers, coupons or feedback.

**Subject:** *A Big Thank You!*

**Body:**

Hey there *[First Name]*,

*Thank you for your recent purchase.*

*We're excited to have you as a part of our community and are here to help if you have any questions about your new **[product/service]**.*

*As our way of saying thanks, we've included a **[special discount/offer]** for your next purchase.*

*It's a small gesture and our way to show our appreciation for your support.*

*Cheers,*

*[Your Name]*

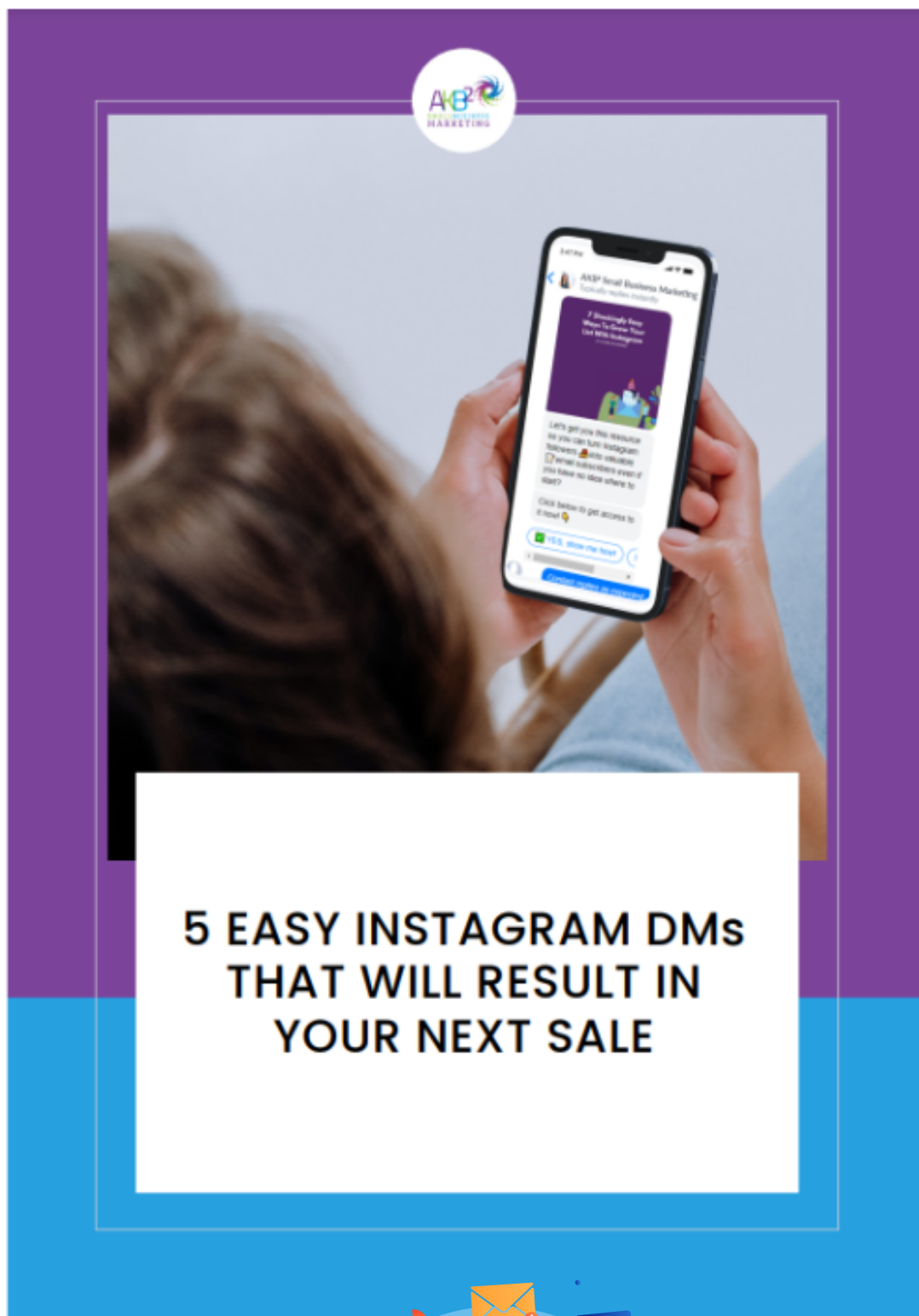
*[Company Name]*



# 5

## Educational Content Delivery

For clients who have shown interest in a topic, automation can drip relevant educational content over time to build expertise and trust, positioning you as a thought leader.





# 6

## Client Onboarding Process

Avoid the back and forth time suck of emails trying to sync calendars and create an automated onboarding sequence that sends new clients all the necessary paperwork, access to client portals, and introductory information.



# 7

## Feedback and Review Request

After a product or service delivery, automate the request for feedback or a review, which is crucial for quality control and online reputation.



# 8

## Referrals and Testimonial Request

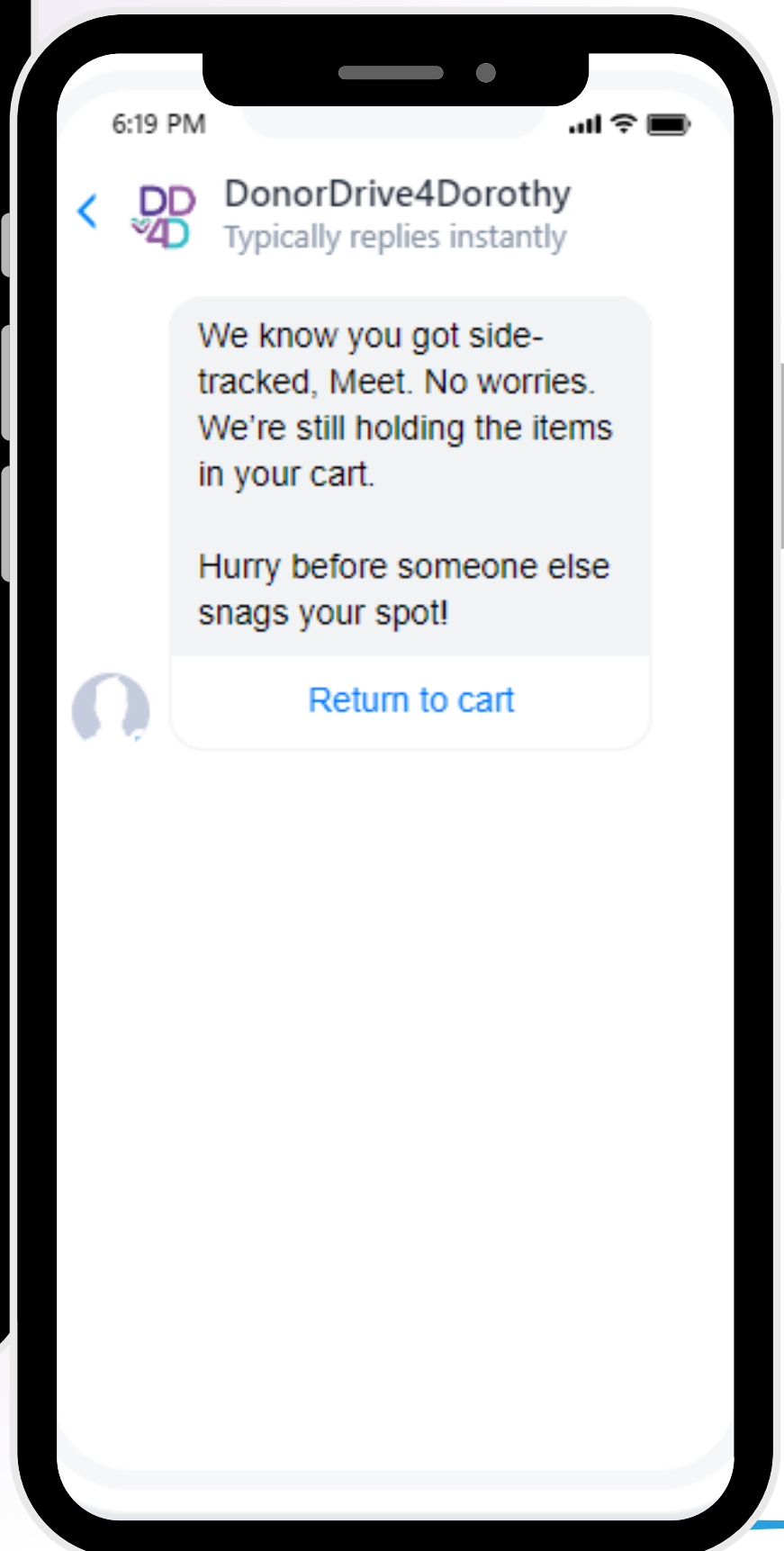
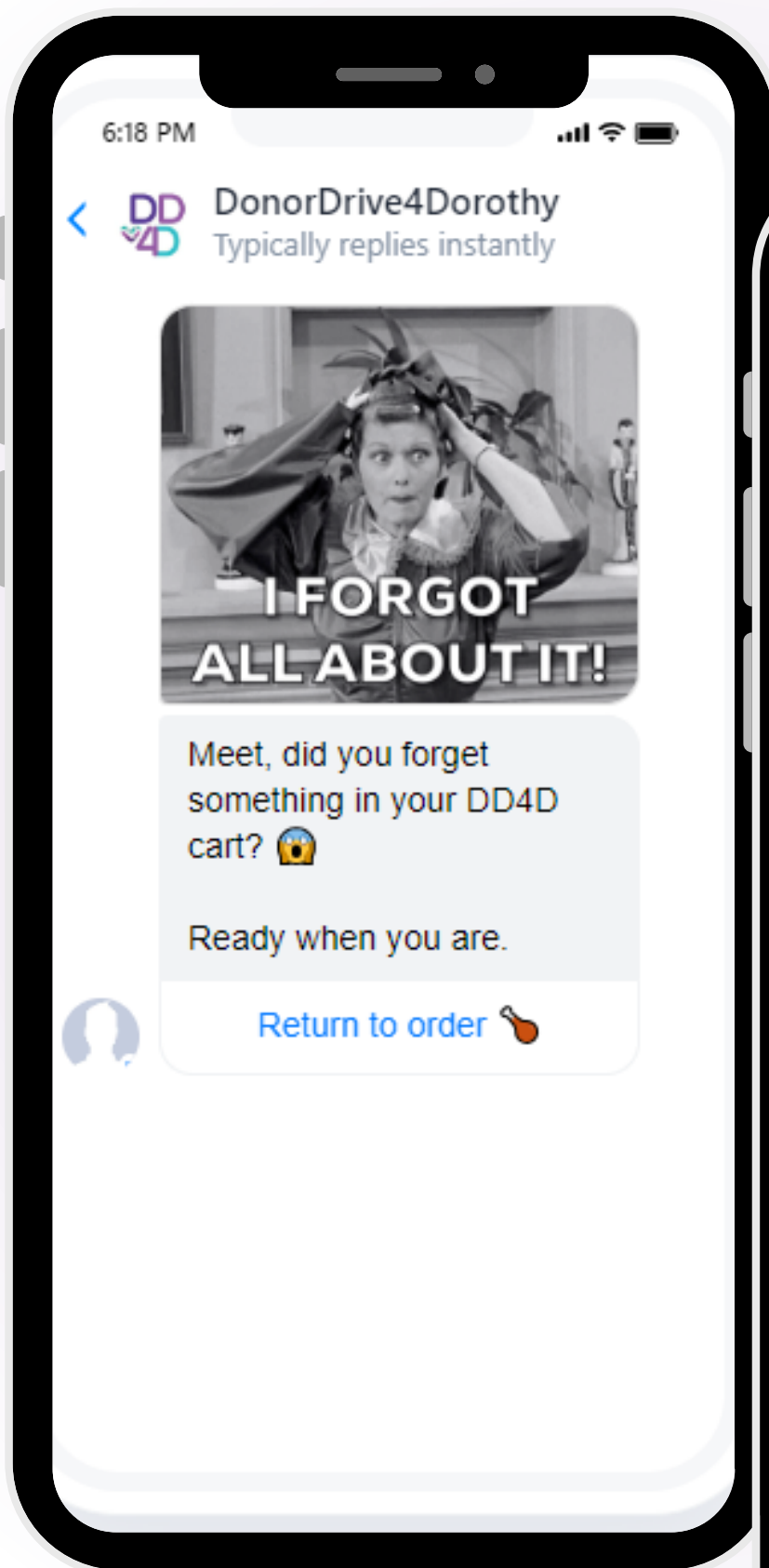
After a client has made a few purchases and appears very satisfied, automation can send a request for a testimonial or an invitation to join a referral program, incentivizing them to share their positive experiences with peers and colleagues.



# 9

## Cart Abandonment

If a client adds items to her cart but doesn't check out, an automated email can be sent after a specific period (e.g., 10 mins) to remind her of her cart and offer help or incentives to complete the purchase.



# 10

## Milestone Celebrations

Automation can be used to celebrate clients milestones, such as sending a discount or a small gift on a client's birthday or anniversary.



Hey Dorothy,  
You deserve a birthday trip!

And there is nothing best than gifting yourself with a trip to celebrate this date so especial and get on new experiences to enrich your life.

To help you to plan a trip for this or the year, **here are some recommendations of places** perfect to celebrate your big day whether you want to go alone or together with you loved ones.



Cayo Espanto, Belize



Patagonia

## Wrap Up

---

Each of these touchpoints represents an opportunity to strengthen the relationship with your clients, increase the customer lifetime value (CLV) and provide exceptional client care by automating tasks that would otherwise be time-consuming if done manually.

They can be tailored to fit the specific needs of your business while maintaining the human touch.

These powerful automation strategies are guaranteed to help you regain valuable time to focus on what matters most like income generating activities or spending time with the ones you love.

If you are ready to automate like a pro, free up your time and scale your business to the next level let's **connect**.

