

# BUSINESS MADE EASY<sup>!</sup>

A man with short, light-colored hair, wearing a blue and white checkered button-down shirt, is smiling broadly. He is splashing in water, with white foam and droplets around him. The background is a light, textured grey.

**Episode 98**

## Why Automation Can Be Bad For Business

Full Episode Transcription

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Good day, good day, and welcome to the Business Made Easy podcast where we make business easy. Jason Skinner, your host here for another week of the podcast, that is all about growing your business, growing your bottom line profit, and giving you a better life as a result. That's what we're all about here at Business Made Easy Headquarters.

Thank you so much for joining me, wherever you are in the world. I am glad you're here with us. Don't forget to hit that subscribe button if you haven't done so already. And that'll make sure that you get each episode as it comes out to you. And if you do like the content from today or any of the other episodes of the podcast and you know somebody who may benefit from, that's in business that may benefit from, listening to the show, then please I'll be forever grateful for you to share that content. You can just share a link at business-- You can share the [businessmadeeasypodcast.com](https://businessmadeeasypodcast.com) website link, even if, if that would be easiest. But that will make sure that the show gets out there and, uhh, is I where I will to help as many people as we can. And that's, that's what I aim to do.

Small Business can be a lonely place out there at times. And it really can be a struggle for, uhh, business owners in particular. Uhm, you know, when they are facing the day to day grind and the likes, I do like to provide content that makes you feel like you're not on your own and, uhh, the topics that we raise are real and that, uhh, you know, there is help and there are solutions available.

And I want to point you to those, and give you the best possible outcome that we can. And today's episode interestingly enough is something that's been happening to me seem-- seemingly more and more. But I'm going to share with you to actual live, uhh, live case studies that I have experienced just within the last week. Now I promised uhh-- My wife Melissa said to me, she said, "Is this

going to be one-- Is this going to be a week-- One of those whinge fest episodes?" Because she knows I like to whinge." But I assured her, I assured her that it's not going to be a whinge fest episode. Uhh, it real is-- I want to share two case studies with you and go through them. And just pull apart why, uhh, why I thought there were problems and why I will never use these businesses that are doing these ever again.

And you'll hear why, in a second. But I probably if I whinge I apologize in advance. I'm not whinging or complaining. Uhh, well, I'm kind of complaining. But it's more so the lessons that I want you to take away from these case studies. And where things could have been done a little bit differently I feel and handled a little bit differently. So, let's get into that. But before we do, if you haven't already joined our free Facebook group, please do so over at [businessmadeeasy podcast.com/community](https://businessmadeeasy podcast.com/community). And I'd love to see you over there in the group. And we can share some stories and some cool stuff as well. Alright, so, on to my story.

And today's topic all stems around automation, automation, and process automation. And for those of you who aren't sort of fully up to date with, with process automation, what I'm talking about here is this idea that we can get computers to do stuff that humans don't. Humans used to do, that they really don't need to do. So, we can automate a lot of processes and systems in our businesses. So that we don't need to employ as many people, uhm, things can happen a lot more reliably and seamlessly. You know, it really can streamline the processes within your business. And I absolutely believe that. I believe in employing or engaging computers to get as much done as we can for us on an automatic system if you like. Or get the computer to respond in particular ways or to deliver certain things at certain times. And I guess the, uhm, the main

benefit and like the simplest process of automation, if you, if you want to think about it, is email automation.

You know, if we think about the marketing role within our businesses, a lot of you may use some form of marketing system; online marketing tool to deliver newsletters, regular emails, etc. Now, I use ConvertKit in my business. And, uhh, and I've been-- I've used a lot of the automation processes within ConvertKit. And automation allows me to scale and do or achieve a lot more than, uhm, than I otherwise would be able to do if I didn't have such a system. If I had to sit and write to every single person, uhh, one email at a time, even if I copied and pasted it, you know, it's a very one dimensional and very manual laborious task. Isn't it?

Because I've got to, actually, I've got to do that. I've got to send each email. But if I am able to send out an email automatically to everybody, and then if someone clicks something, and then another email or further correspondence to help someone, uhh, that could actually, you know, streamline my process and make things happen a lot, lot faster for me.

So, automation can be a great, great thing. So, I want to get this very-- this point very, very clear. Automation in your business; I believe these days, the tools, technology, uhh, know-how, all that stuff is there now. And I think we should be looking in using it in our business as much as possible. So I don't-- I don't want you to go away from today's episode going, "Oh Jason said automation is no good." You know, don't do it. Uhh, but I do want to talk about what roles automation plays in your business and why it's not right at every-- for every function within your business. And uhh, that's a really important distinction to make. Automation is great for process-driven, repetitive tasks. I feel I think it's great for, for that. But as you'll hear from my two case studies in a moment, it's

not the best for every, uhh, interaction. And you need to build in some points where the humans-- where humans can step in, when that automation doesn't work or where that automation, uhh, is just not, uhm, in good keeping with customer relationships.

And the first one I want to share with you-- First story I want to share with you, I had a parcel being delivered recently. And uhm, I didn't, I didn't choose the couriering company or who the courier was, but I ordered the product online. Uhm, and this was the first thing-- I rang up the shop-- I rang up the store to buy the goods and they said, "Oh no, you can't buy the product. Uhh, I can't order the product for you. You need to go on to our online store and do that." Uhm, that's a side issue. I'll talk about that another time. But I went online, did what I was told. Went online, ordered the product and waited for-- paid for it, everything like that. And I got a notification saying, "Here is your tracking order." Uhh, and it's being, I won't mention the couriering company. Uhh, I don't like to bad mouth people, but the-- Here is the couriering company, and here's the tracking number and, uhh, your goods are on their way. So, I've great peace of mind. And that was good. Correspondence to say--.

So, I don't mind automation for that process. That's, that's a function I've been, it's a simple function, I've been let to know that the goods are on their way. And here's the tracking number if I've got any troubles. And this is where it went wrong. So, I'm expecting the goods to arrive, and uhh, any day, day one went past, day two went past, nothing. And then day three comes by and I get an email at the end of the day, saying, "We tried to send your-- We tried to, uhh, deliver your goods, nobody was, uhh, available to collect them. (This is an email. This is an email.) Uhh, no one was available to collect them. So, we've returned them to the depot. Please call this, please call this number to rearrange redelivery of the

goods." Well, the very first thing I thought to myself, hang on a second, they have not delivered those goods because-- or tried to deliver those goods because we, uhh-- our office is actually on a street front in a, in a retail street, front if you like. Uhh, very busy sort of area and we're there from-- our office is open from 8:30 'till 5:00 o'clock, Monday to Friday. So, they absolutely, there is absolutely no possible way that they could have tried to deliver those goods. I suspect that we got to the end of the day and the courier decided he had too much to do, and just took it back to the depot, is how it felt. And that was the explanation given to me subsequently from the shop owner.

But anyway, now the story. So, I get this, I get this, uhh, email that says, "Call this number 1300, blah, blah, blah, and reorganize delivery." So, I was a bit angry because I knew that we were there, knew I was able to collect-- to receive the goods but, ring the number and I get an automated phone response. And you're-- and it was one of those ones where it's push 1 to do this, push 2 to do this, push 3, and so on. And you're sort of wondering which option you need to choose to talk to somebody. Because option one was push 1 to reorganize delivery of previously failed delivery. So, this must happen a lot, I'm thinking. So, I push 1, go through to the next thing, "Please enter your tracking ID number and we will organize." So, entered the tracking ID number. Now again, computer, computer-automated, automated. There was absolutely-- to cut a long story short, no option whatsoever by calling that number to speak to a human, to actually talk to a human.

Now the problem I had with order--. Yes, I could have just organized redelivery, but if I had have just organized redelivery, they couldn't access-- they couldn't get to us last time. They clearly didn't go to the right place last time. Why would I want to send the goods back to the wrong place again? It was no point

organizing redelivery without speaking to someone because clearly, the courier driver didn't know, uhh, where we were. So, uhh, there's no point reorganizing that, I thought. So, it would have been better to talk to a human. I could be wrong-- I might be wrong. I might be, might be, uhh-- my wife would probably disagree with me necessarily on my frustration with this. But I just thought really, there's a point in that line that, uhh, automation has to stop. When you get to a point that-- there needs to be an outlet for or a place where a human can come in and build that relationship for you, I believe. And I think this is where automation, uhh, does fall apart; it does not build human relationships.

Human relationships are built through working with humans and talking with humans. Not responding to automated phone messages. And that because every time-- my frustration level just built and built and built every time I got put to another number that I had to push or enter another number. My opinion of that brand was eroding like there was no tomorrow. I mean, there wasn't much there left to erode after they didn't deliver it in the first place. But my opinion of that brand was just eroding with every push of that phone button. And this is my point: If we are serious about building relationships and building our brands, and building our businesses, uhh, and that aspect of business, then we need to step in. We need to have humans available to properly manage and grow that relationship with our, with our customers and potential customers, because you cannot automate that process.

Now, uhm, I'll give you an example. We use a system to book my calendar appointments. Now, years ago-- not so many years ago, actually, this last year, uhh, you know, why the way appointments were made in my business for me, was that-- were that we would have an administration person who would take the phone call and would go back and forth with the person over the phone,

uhm, to try and find a mutually suitable time to come in and have an appointment. And, you know, yes, that did have a human element to it and it was good. But it was also a very task-orientated thing. And quite often the clerk would have to say, "Well, look, I've got to go back to my sparse and see they're available." You know, it wasn't always a convenient experience. And this is where automation did help. Did work because now I use a system called Calendly. And basically when someone inquiries about making an appointment with me, I basically can send them a link to my diary, and they can click on that link at their own volition and their own time. And when their sparse is available, they can get their times right, and they can see what's available. It automatically book the time at their convenience in my diary. And that works beautifully.

But if I was to then-- if they were having a trouble with that, and then I subsequently to push them into another automated sequence because they couldn't book with that system, then you can see my point, the relationship would erode. So it's good for-- automation is great for, uhh, process type tasks, like my case in point with the first example where they sent me the email to let me know my delivery was on its way, and this is the tracking number. Uhm, even an email to say, "Hey, your goods-- we're delivering your goods today. And we expect to be here between this time and this time." Automation is fantastic for those things. But as soon as something goes wrong, you cannot automate the solution to that-- to the problem I believe that has gone wrong. If the automation derails, you can't then fix that derailment with further automation. You need to step in. You need to have a human going in there at some point in time to actually, uhh, do that, to fix that process, and to make everything, uhm, everything right again.

Now, I had a similar situation with, uhh-- I had a similar situation with another service provider we've been using where-- whereby I got an email out of the blue. It was a payment gateway solution. I got it, I got this email out of the blue and it said, uhh, "We have suspended-- Mr. Skinner just let you know that we've-- Pending verification of your account, we're suspending your account. So, you won't receive any further payments, clearances from your website until we've properly verified your account. Best regards, the verification team." And I get up in the morning, I get this email, and I go, "What? What's this, I've already been verified. What's going on? You know all the questions. Melissa told me to settle down." I get quite passionate about this stuff. Uhh, but, see, the email was quite blunt, like quite, it was-- I mean it was explanatory, but it was pretty well out of the blue. And it said, "Please provide-- We're not going to suspend your account until you provide the following information."

So, I thought, well, that's not good. I don't want my, uhh, my revenue to turn off just while these guys are walking around. So, I promptly responded to all the questions and information they needed, sent it back, never heard anything back. And I've gone, "What's going on here?" I looked a little bit further, it said, "Verification can take up to three business days depending on, provided you've given us all the information." Well, I know I'd given all the information. But it was sort of a week and a half now, and I still hadn't heard anything. Not a boot, not anything, not any response at all. Now, this is where automation would have worked. Because if they'd sent me an email to let me know at day three, that uhh-- which could easily be automatically done. "Mr. Skinner just letting you know that we do have the information. And Joe Blow is currently processing that. A human's looking at that now for you, and here's Joe's contact details if you've got any questions." Uhm, that would be a totally different experience to me. But I didn't hear anything. So, I thought, "Okay, well, I'll go on to their

support." Run up-- get on to the support, plug the support number in and, uhh, and I got nothing. I literally, it said-- I came up on the-- explain what it happened in the support request, and then when I hit submit, nothing came. Nothing came back. And it just said on the screen, uhh, "Your support request has been submitted. Thank you." That's it.

So, wait again, another day goes by, nothing, still no payments coming through. And I'm looking on the dashboard. And I'm seeing amounts building up on my dashboard and they're stable, but nothing coming through to our bank account. And I go, "What is going on here?" So, uhh, and it's a relatively new service that I've used, so I was kind of a bit dubious as to, to whether or not it was up to anything. But I set, uhh, I file off another support request, all right, I say, "I wrote to you yesterday, did you get this? Could someone respond, please?" Nothing. And this went on about three or four times. In the end, I'm quite frustrated by this point. My blood was really boiling, actually. I wrote, uhm-- I went, uhm, through the website and I just scrolled the website looking for some form of contact number. Anyway, I stumbled across one right down the bottom in the footer like, was what, "We really don't want you to read this. But if you absolutely have to, here is our number, here." So, I get the number right, and I ring the number and I get the push 1 to do this, push 2 to do this, etc. And I go, "Here you go, you're going to get one of those automated things." But as luck would have it, a human actually answered the phone for me. And I explained the situation and nicely, of course, and explain the situation. And basically, uhh the problem was fixed overnight.

But what it highlighted to me was, they were relying on automation to do particular tasks and roles in a job and in their company. But again, it was letting them down by eroding any goodwill or any efficiency. So, they're being-- they're

thinking, "Oh, how far each other being efficient, and, you know, look how great we are, look how great our customer service is, look how quick we can do things." But when you, when you, when you need, uhm--. You can't automate the relationship and automation can erode that relationship so, so fast just as quickly, if not quicker than a bad human on the end of the phone can erode that relationship. So, when you're looking at automation in your business, my takeaway from this is, look at the touchpoints within your business. Look at the customer touchpoints within the processes that are vital and should never be automated. Uhm, so, you know, yes, it's one thing to send uhh, uhh, an email-- an email marketing campaign and have emails go out and, you know, you've got--. You're systems like, uhm, InfusionSoft or Keepers, as it's called now, which can automate all these funnels and do all these, create all these funnels. And when someone does this, they go here, and when they do this, they go here. You can do all that, that's fine. But don't overlook the touchpoints, the human touchpoints when a human needs to actually see or talk to another human.

And one of the great tools that I love, and it's really, really simple to do with it--. Really simple to do this, and a great, great idea for you, uhm, is you can set up video type automation, or systems that will allow you to interact with the customer quite quickly, uhm, on a human-to-human basis and build that personal goodwill. It's like to -- I have spoken about this before on the show -- but it's like putting credits in a bank account when you talk to another human and they have a good experience with you or your business. So, you know, uhm, really putting the-- taking the time to put these human touchpoints in can be really beneficial. Uhh, what I'm talking about here is automating a little bit of that and making that easier. Using programs like Bonjoro and I've had the-- the founder of Bonjoro, uhh, on the show before and I use Bonjoro myself in my business. Uhh, great program, I'll put a link to it in the show notes for you, check

it out. But, uhh, at [businessmadeeasy.com/episode98](https://businessmadeeasy.com/podcast/episode98) will be the link for the show.

And what Bonjoro does is-- is you can set up Bonjoro so that, let's just say, something happens in your funnel, a particular event happens, a potential customer does a particular thing. Let's say, somebody buys something. So, someone's gone to your online business or someone's done something within your actual business and-- it's not just for online businesses, there's you know, if you've got a physical business, someone may have made a booking. Someone may be coming into your business at a particular point in time and you're looking forward to seeing them or, you know, might be a special event or anything that you can use this for any of that. But what Bonjoro will do, allow you to do, it'll allow you to record a personal message and send it to somebody via email. So, they'll get an email in their inbox, and it'll say, uhh, "Hi, Jason, Joe Blow has recorded a Bonjoro message for you. And click here to watch it." And you can say anything on that video message. I've seen this done really, really well. I know the guys at ConvertKit do this when someone signs up with their, with their, uhh, program and I'll put a link to ConvertKit in the show notes for you.

But ConvertKit, uhm-- When you sign up for the-- for their software, uhh, their emails automation software, basically will send you, uhh you know, you get a Bonjoro video message saying, "Hey, welcome to Bonjoro-- to ConvertKit. And we're looking, you know, glad you're a customer and hope everything goes smoothly. Here's some resources that will help you or here's what to do to get started." In a personal touch being-- it's been automated to a point. Somewhat that the computer sends an email to you or to your Bonjoro account and puts it on your to-do list and says, you know, the thing you need to do is open up your Bonjoro every morning and [inaudible]. This my Bonjoro messages, I've got to

send this morning, and you can send a video personal message. Now, that's not talking one on one. But it's putting a face to your business and a face to your brand. Now, let's go back to my example with the courier company and the delivery that when, when uhh--. They literally had no way of talking to human. I mean, literally no-- I actually hang, I hang up from the first call and I thought I'll go to their website and surely I can go to their sales or something like that there. And I rang every single number and everything was--. I don't know how they survived. But anyway, there was just no way of talking to a human.

But imagine if, imagine if I got a personal message from the courier driver that says, "Hey, Jason, I'm just here outside, blah, I've tried to deliver your parcel, there was no one there. Give me a call on this number, and I'll organize redelivery for you. Or, you know, or call out dispatch team or call a person, a human and we'll get, we'll get the good sorted in to you." And it's about caring. It really is about caring about your customer, and how they consume or use your product. And whether that be a courier service, whether it be a lawn mowing service, or whether it be, uhh, you know--. You can use automation all you like, but don't over ignore-- don't ignore the touchpoints, the human touchpoints and where they are necessary. And the best way to do this, if you're looking for a way to do this-- I hope I haven't ranted too much. I promise, Melissa. [laughter]

The best way to do this is to map out your customer journey, map out what happens. Uhm, so you know, it might be event 'A', this is going to happen. So, what happens if event 'A' goes wrong? Well, we go down this path. So, you can do a flowchart sort of thing. What happens if event 'A' does go right? Well, this will happen and get your go to this stage. So, map out that customer journey. And try and look at where the customer touchpoints are at each point along that way. You don't want to overdo it, you want to use automation, where you can do

as I said, use to book appointments, use it to confirm things. Uhh, use it to communicate that things have happened as the customer expected. But the moment that something goes wrong, or something hasn't happened that the customer was expecting, okay, because this is about managing expectations of customers, uhh, you need to know what's the touchpoint. How are we going to communicate with that customer so we can get them back on track. And meeting their or exceeding, better still, exceeding their expectations of what they expect from our service or product. And that is just so, so critical.

So, my message to you this week, my whole point of this podcast is, yes, use automation. I've given you a couple of tools there, ConvertKit. As I said, I'll have a link in the show notes to that. Bonjoro's an amazing tool for using automation. But my main point is for doing video automation, I should say. But my main point is don't ignore the touchpoints and don't try and automate human relationships because you cannot successfully, I believe, do that. It's the same with bots. I haven't even gone down that path with bots. But just quickly, there was a situation where I was-- I got onto one of those chat things one day and as-- I had a particular problem needed to solve, so I thought--. I like the chat thing. The chat works really well for me provided it's a human on the other end of the chat, that is actually doing the uhh, the chatting that knows what they're doing. Whereas, when you use chats--. So, it's a great efficiency tool like that because I don't really like the telephone a great deal. I don't mind using the chat. But with the chat, you can't hook a bot up on the back end of it and call that your support team. Because, uhh, this chat that I had-- I needed to talk to a particular person and this computer-generated bot was sending me around and around and around. And he could tell the questions just what a human would ask and it was the size I tacky. That again, blemish my whole experience with that thing.

So, another example of automation, you know, if you're going to put chat, the chat is automation in itself to a large extent, even if you have it on the initial thing, and it might say how can I best direct your, your call, or your query today? Would you like sales or support or whatever, and then you spoke to him, and that's fine, too. But really, when you're going to have those chat things, make sure it's a human on the end and they're talking, they're talking with the customer so that, uhh, you know, they're getting the support, they're getting the support that they need.

And one, just quickly one, one company that I know that does that really, really well is WP Engine. Their support is absolutely amazing when it, when it comes to, to having human on the end. And yes, there's a bit of automation in the process in the sense that, you know, it all starts up that way but, uhh, which I'm sure saves them time and money. But they build their relationship with me every time I have a technical question. There's a human there, uhh, answering it. So, anyway enough of our ranting for this week. [Chuckles] I didn't want to be negative. Uhh, and I certainly hope you didn't get that as a negative episode. It's a positive episode in the sense that I want you to remember and stay focused on those, uhh, stay focused on those human touchpoints and those human relationships and the importance of human relationships in your customers' journey, and exceeding their expectations.

Already, I hope that's been beneficial, beneficial for you. We're at Episode 98. So, we're getting very, very close to the, to the big 100, which I still can't believe. And I'm very much looking forward to that, to that episode with you. But until next week, that's all I had time for and I'm going to hand you over to Mia now. She's going to take us out again for Episode 98. And until next week, you have a

fantastic week and, uhh, here's to your success. All the best and take us out Mia.  
Bye guys.

## Thank you for Tuning In



We hope you enjoyed this episode.

If you have any feedback or questions about the content in this episode please don't hesitate to drop me a line at [jason@businessmadeeasypodcast.com](mailto:jason@businessmadeeasypodcast.com) I would love to hear from you.

Other things that you might like to help grow your business.

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Thank you again,  
I appreciate you!

*Regards  
Jason*