

The Story Copywriter Podcast

Episode 3: The Systems Expert



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Nurturing potential customers is not a one person game. You can't do it all by yourself...

You must decide which role or roles you're going to take on yourself. The four roles are:

1. The Business Owner or Product Owner
2. The Systems Expert
3. The Copywriter
4. The Implementor

In the last episode we were talking about the role of the business owner in telling stories and moving people towards making a sale. In this episode, we're going to talk about the role of the Systems Expert.

Who is the systems expert in your business?

The systems expert is the person that has the best understanding of your email marketing tool. There IS always a systems expert, even if that person doesn't necessarily regard themselves as such.

Normally it's the person who logs in to the email marketing tool the most often.

We have a lot of powerful email marketing functionality at our fingertips. I think there's a real opportunity in having someone embedded in your business who really knows how the tool works. Someone who really knows how to get the most out of it.

I've been a 'systems expert' a few times throughout my career.

In my first job after university I worked for a manufacturing company. On my first day of work, my boss Marjorie said to me, "*We have this CRM system called Goldmine. The sales team don't really like it, but it's what we use to manage leads*".

Even then as an 18-year old, I had this kind of red flashing light going off in my head. I was like well, "*if the sales team don't like it, then why are we using it*". I think the reason the sales team didn't like it was because they hadn't been trained to use it. There simply WAS no systems expert to show them how to use it!

I had the thankless task of entering prospect data into Goldmine and assigning a sales rep to that prospect. It was a horrible job but a great way to learn the system. I ended up knowing more about Goldmine than anyone else at the company, so I ended up becoming the de facto systems expert..

As the systems expert I ended up training the salespeople on how to use Goldmine and manage our leads. Although I had never agreed to play this role, I was the best placed person to deliver that training. I knew the company processes and had the best working knowledge of the CRM system.

In 2007 and as a result of my work with Goldmine, I ended up working with another CRM company called ProspectSoft. At ProspectSoft we did a lot of marketing in house. We sent a lot of emails. We would export a CSV file of contacts from the CRM database into a tool that allowed us to send an email to each contact through our own internet service provider.

Which was a bit like sending 30,000 emails from your Outlook address to contacts who don't really remember who you are. Consequently, we got a lot of spam complaints!

One day the Sales Director walked into our office and said, "*Look, we're trying to close an £80k deal, but the prospect isn't receiving my emails*".

We discovered that our entire prospectsoft.com domain had been blacklisted as a result of our activity in marketing - sending emails without a robust unsubscribe mechanism.

To this day I still don't know what the technical team did to get us un-blacklisted. But this was a hugely stressful period in my life.

We ended up switching to an email marketing platform called Communigator, which was a sophisticated email marketing platform.

I used it a lot and quickly became the de facto systems expert for CommuniGator too.

The systems expert is usually the person with the best technical knowledge of the tool, but I think there is a change coming...

I believe the systems expert needs to play a larger strategic role. Rather than just being the de facto, or accidental expert in your email marketing tool, they also need to understand and help guide your strategy. They need to understand your processes and recommend the appropriate email marketing technology to achieve your goals.

This technology may not be a single email marketing system. The systems expert may be responsible for implementing a technology stack that may include a email marketing, landing pages, integrations for Facebook custom audiences, and other tools.

All of this has to come from YOUR strategy and YOUR processes. So the systems expert must understand your strategy and your processes first.

On this podcast I'm going to cover three ideas:

1. It's not about the technology
2. Build with less 'code'
3. Segment your audience

1. It's not about the technology

The systems expert is by nature a technical role. If you've ever logged into Keap, HubSpot, ActiveCampaign or Drip, you'll know these can feel like technical systems. Not technical in a coding sense, but technical in terms of building the automations and building the flows. There's a certain kind of logic to it.

One of my mentors Chris L. Davis calls the systems experts the 'Automation Service Provider'. There is currently a move from the systems expert having isolated expertise in one particular tool to having wider general expertise.

The goal of the Automation Service Provider is to understand your strategy and understand your processes. Then to recommend and implement the appropriate marketing automation based on the processes that you have mapped out for your business. .

Those processes should be independent of the technology.

It's easy to get bogged down in the more technical aspects of tagging customers, creating custom lists and implementing flame scores.

Instead the systems expert needs to be mapping out processes. We need to know what communications are going out, when and to what segments.

When someone enters your world, presumably there's a form on your website...

What happens after they complete that form?

What data do you collect?

What are you going to do with that data?

How many emails are you going to send them?

Are you going to add them to a Facebook custom audience?

Are you going to send them any direct mail?

Answering these questions up front and determining the process dictates which technology to use. This must be process first rather than technology first.

I've been involved in a few projects where I've been the Infusionsoft expert - the systems expert in the client's business.

In those cases my clients chose Infusionsoft because that's what their competitors were using. Which is completely the wrong way to select any technology for your business.

Selecting the technology for your business has to be driven by YOUR needs. It has to be driven by YOUR strategy.

Most of their Infusionsoft campaigns were a mess. Sometimes Infusionsoft wasn't the right tool for the strategy they were trying to implement. Often they were using various apps to duct tape Infusionsoft to other systems. It would have been easier for them to use a different system with better native integrations.

Sometimes, Infusionsoft was the wrong system to begin with. Other times they had a series of people working on Infusionsoft campaigns who didn't really know how to use it. Consequently tags and custom fields were a mess. Little thought had been given to the overall customers journey.

The longer you use a tool, the more email sequences and automation flows you're going to have. If your campaigns are a mess this only compounds over time and as your list grows.

It's rare that I come across clients that not only have a very clear grasp of what is going on in their email marketing platform, but also documents exactly what campaigns and automations they have created.

It's the documentation that gives new systems experts a clue as to what was set up, why it was set up, and how each element maps to the business process that you've identified.

Documenting processes is an important job for the systems expert. They must document what they're done for themselves and for any future systems experts.

It's relatively simple to document processes. You can do it in a flow chart builder or spreadsheet. I document all of my sequences using a combination of Airtable and Lucidchart. With Lucidchart I can map the flow between different automations and between different email sequences. It helps create a high level view on how the different sequences move from one to the next.

I use Airtable to detail what emails are sent in each sequence, including the copy that goes in each email. This is also useful as a backup of the emails I write. Your email copy should not ONLY exist in your email marketing platform. You need a backup.

The role of the systems expert is not just to decide which technology to use. It's about understanding strategy, understanding processes, documenting processes, and then selecting the appropriate technology to implement the automation surrounding that process.

2. Build with less 'code'

The second idea I want to cover is that you should aim to build with less 'code'.

I don't mean to use less actual code. What I'm talking about is building with as few automations, and as few campaigns as possible. Try to maintain a simple structure so that you can look at your list of automations or campaigns* and easily see what each is doing.

* I'm referring to campaigns and automations in a sort of fluid sense because with ActiveCampaign your sequences of automated emails are called automations but in Keap (from Infusionsoft) they are called Campaigns. And in ActiveCampaign, campaigns are single email broadcasts. The terminology can be confusing.

Often when I look at other people's list of automations, it's just a mess. There are more automations than are necessary to deliver the strategy. There is also no clear naming convention so it's very difficult to pinpoint what is going wrong. Nearly always there is no documentation - no way to know what automations have been created in the past, why they were created or what emails are still actively being triggered in those automations.

This creates a problem if you tag a contact in your email system, and suddenly that contact is receiving five or six emails because you forgot you used that tag as the trigger in several email automations. Without clear naming and documentation you won't easily know where the emails are being triggered from.

Honestly, it gives me a bit of a nervous twitch just describing these issues! Especially because they are mostly a function of poor organisation.

That's why it's important to keep things as simple as possible. When you go into your list of automations it should be obvious what each automation is supposed to do. Each automation should have a single goal. There should be a granular structure where you create more automations but attempt to do less from any single automation.

Maybe the automation is trying to get a customer from one point to the next. For instance, after someone opts in on my Story Copywriter website for my 7-day storytelling course they are added to an automation flow.

This automation sends those people seven emails. At the end of the seven emails there is an invitation to join my Nurture Email Mastery course. Getting people to sign up to the course is the goal of this automation. I don't include further emails that talk about the benefits of Nurture Email Mastery - because those belong in a **separate automation**.

There are three important elements of 'building with less code'.

First, keep a simple granular modular structure to your automations and try not to do too much in any single automation.

Second, maintain a clear naming convention so that you can look at your automations and know what it is supposed to be doing and for what purpose you created it.

Third, add clear notes to the automation itself. In Keap and ActiveCampaign you can add notes to automation flows. It's rare that I see people adding notes to their automations. You should also document your automations in a spreadsheet or a tool like Airtable. This allows anyone to easily reference what automations have been created and what they're supposed to do.

3. Segment your audience

Your systems expert must understand your strategy and your process. As part of this they must also understand segmentation.

There are two ways that you can segment people: you can segment people based on:

1. Who they are
2. What actions they've taken in the past

In my business my two main segments (who they are) are business owners or digital marketing professionals. Although people can sit in both segments if you run a marketing agency. People in each segment receive different emails that talk about different pain points. They also receive different offers.

You can also segment your contacts based on their activity. There's an old direct marketing concept called 'RFM', which stands for Recency, Frequency and Money. Following this, you can segment your database by contacts who opened your emails most recently, or those that clicked on links in your emails most frequently. You can segment your database by people who spent the most money with you over their lifetime that they've been on your email list.

Most email tools will let you segment based on RFM in some way. You can also export your data to Google Sheets and calculate it yourself.

Tools such as Keap and ActiveCampaign have a flame scoring option. When people engage with your emails the system adds points to their flame score. Over time those points decay if the contact is no longer engaging with your emails.

The flame scoring or points gives you a snapshot of the hottest contacts in your database. If you have a special offer you can send it only to your most engaged contacts.

I'll talk more about RFM in another episode.

It's important that your systems expert understands both forms of segmentation.

If you are maintaining a single list and sending broadcast emails to the entire database, then I think you're leaving some degree of money on the table.

There is money to be had in segmenting your database. Try to send contacts more relevant offers based on their interests. Send your most expensive offers to contacts that have spent the most with you and most recently. Don't send your highest value offers to those that rarely engage with your emails.

If you segment based on who your contact is and based on their RFM activity, you will nearly always increase your email marketing return on investment.

That is one of the goals that the systems experts must play.

Summary

The systems experts used to be the person with deep knowledge about the tools being used. But now I think we're moving to a situation where the technology is fragmented across different tools.

Rather than having an all in one CRM system that does everything, you might find a technology stack will help you better achieve your outcomes.

The goal of the systems expert has also expanded. They must now understand your strategy, understand your processes, and then recommend and implement an appropriate technology stack to achieve your objectives.

Your systems experts should help you build with less code. They should create simpler automations in a modular structure, where it's clear what each automation is supposed to be doing.

The systems expert must also document everything they set up and maintain a clear naming convention. With this in place, if your systems expert leaves or stops working with you, you can easily jump into the systems expert role. It will be clear what automations are active, what email sequences exist in those automations or what emails will be triggered when any given tag is added to the contact record.

If you don't have documented processes and clear naming you'll have automation chaos.

If you're not segmenting your database, either by who people are, or what they've done recently, you're leaving a degree of money on the table.

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