Clate Mask Interview

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Editor:

Hello and welcome today's guest is someone I've been itching to talk to for some time. Clate Mask is the CEO and cofounder of a company called Keap, which was formerly known as Infusionsoft. Now this is a company you may or may not be familiar with, but it is one of the most Revolutionary software as a service companies out there today. But what is Keap and how does it help power business? Well, we'll find out that and so much more. Clate, welcome.

Clate Mask:

Thanks so much. Great to be with you.

Editor:

Well, it's great to have you with us and for anyone listening, who doesn't really understand what Keap is or what it is that you do, maybe you could start by telling me what it is and what it does.

Clate Mask:

Yeah, the simplest way to say it is that it's sales and marketing automation software for entrepreneurs. Entrepreneurial small businesses, they're busy, they're wearing so many different hats. They're trying to get all kinds of different things done and it's really tough to not drop the ball with prospects and customers. So you need a system to help you follow up effectively. You need a system to help you to nurture leads, turn them into clients, turn those clients into rating fans and that's what our software does. It's an automation platform for small businesses.

Editor:

Is this what is known in industry as a CRM?

Clate Mask:

Yeah, a lot of people will refer to it that way. Sometimes we'll talk to entrepreneurs and small businesses and they're like, "I don't know what CRM ... I can't even spell CRM. So, we definitely refer to it as customer relationship management software, CRM for entrepreneurs, but simply put, it helps you to do a better job with your sales marketing and customer service.

Editor:

Great and what is it that inspired you to start Keap?

Clate Mask:

Yeah, well, we were helping small businesses do their sales and marketing online more effectively. This was years ago, 18 years ago. What we found was that there was so much disorganisation and chaos that made it really difficult for our customers to follow up effectively. So we created an automated way to send the right message to the right person, at the right time to build relationship, to do it efficiently and put more hours in the day for the entrepreneur.

Editor:

Makes sense and how difficult was that as a concept for you to achieve?

Clate Mask:

It's interesting, it took us about three years in the early days to get it right. We began using it ourselves and when we started to see our customers use this personalised, automated follow-up, we saw what a game changer it was. The funny thing is we weren't using it yet. We weren't using the automation aspects ourselves. We were using it to organise our contacts and follow different calling lists and things like that. But it was really manual and it wasn't until we started to see our customers using the automation, that we said, "Hey, you know what? We ought to use that ourselves." Once we started using it ourselves, it completely changed the game.

Editor:

For anybody who's never seen Keap and what it is capable of, I know that there's maybe some confusion, perhaps, because for a long time you were called Infusionsoft. Maybe you could just explain a little bit about how Infusionsoft evolved into Keap?

Clate Mask:

Yeah. So for years, Infusionsoft was this powerful sales and marketing automation software, but we heard customers and people who wanted to sign up for it, they'd say, "Oh, I need something lighter." I need a lighter, easier version of Infusionsoft. So we began creating that and when we got done creating it, we said, "You know what? Most people are going to start with this new product and then some will grow into Infusionsoft."

So Keap is the lighter, easier version of Infusionsoft and the reason why we renamed the company is that most customers will start there and we want our software to be known first and foremost for ease of use. That's not what Infusionsoft was known for. Infusionsoft was known for all the power, all the bells and whistles, all the things you could do, and we want that too. We want our customers to have that version. So today you can buy a number of different products from Keap. You can buy our Grow product, which is for the earlier beginners and then you can buy the Pro product for people that are starting to move up a little bit, and then you can buy our Infusionsoft product, which has all the bells and whistles.

Editor:

Great. So, I mean, it's a fully featured suite of solutions, I guess is what you're saying. That you went from learning to drive in a Rolls Royce with Infusionsoft, now you can learn to drive in a much smaller car and then advance up to the driving in a Rolls Royce.

Clate Mask:

That's exactly right and the car analogy is a good one. We've heard that many times where people said, "Infusionsoft's a Ferrari and I just need a Honda Accord," you know?

Editor:

Yeah.

Clate Mask:

So we now have ... you can get started with the car that's right for you and if you want to get all the power and all the capabilities of Infusionsoft, you can upgrade to that. The reason we named it Keap is that for those who know Infusionsoft, you know that we've always been about empowering the entrepreneur and encouraging that entrepreneurial spirit. The reality is sometimes it's really tough and you just want to quit. Our message has always been to these entrepreneurial, small businesses, keep going, keep serving, keep growing and we call it Keap. We spell it with an A so that we can own it and it's been fun over the past year to start building this brand.

We'll continue to do that. We have a mission that takes us through the year 2030, and our mission is to simplify growth for millions of small businesses and we'll continue that encouraging entrepreneurial spirit to keep going.

Editor:

Oh, love it. Love it. Now, alongside your work with Keap, you're also a published author. I know that you coauthored the New York Times bestselling book, Conquer The Chaos. Maybe you could just tell me a little bit more about that, how you got involved in writing books.

Clate Mask:

Yeah, you bet. So boy, it's been about a decade since we wrote it. What happened was, as we were helping our customers, we saw these common challenges that were causing small businesses to not grow and entrepreneurs to be frustrated and not able to find the freedom they were looking for when they started their business in the first place. See, that's the thing about entrepreneurship is we get into it because we want to have freedom. We want to have impact. We want to have the control to earn what we're capable of earning. The reality is when you get into the business, a lot of times you don't

have freedom. You have captivity, the business controls you and owns you and dominates your life.

So as we saw this problem, we began to see very common patterns in what caused the problem and we also saw very common patterns among those who were successful in finding the solution. So we began to do some research around it. We began to collect our thoughts and really what happened was we had a bunch of friends and family and people we cared about who were asking us for all sorts of advice. We said, "You know, we just need to write this." So we wrote a book and we write all about the entrepreneurial mindset and we write all about the systems strategies that are needed in order to conquer the chaos and grow a successful business.

Editor:

Fantastic and congratulations for becoming a New York Times bestseller, I know how difficult that can be.

Clate Mask:

Thank you.

Editor:

It obviously looks like the book landed well, and many people obviously needed the information that's in the book. I mean, in terms of becoming a CEO, a cofounder of such a big company and seeing the growth of the company, I guess one of my key questions is how do you fit everything in?

Clate Mask:

It's a great question. I've got six kids and I'm busy with church responsibilities and leading a company. So it can definitely be challenging, but I've learned that there's no balance without priority and so you have to understand priority. I've learned that when I say yes to one thing, I'm saying no to somebody that I love. So I'm very careful about saying yes and that's, by the way, really hard, because I want to help more entrepreneurs. I want to be an advisor. I get asked to be a mentor or an advisor and I have a desire to do those

things. I love entrepreneurship, I love helping small businesses grow but the challenge is when you say yes to one thing, you really are saying no to another. At the end of the day, there's so much time you have, and you've got to make sure that your prioritisation is right and you say no a lot.

So those are a couple of things I've learned and then I just ... I have a whole bunch of little life hacks that I use, things like leaving my phone in the car when I get home for a few hours until I can get the kids down and have a little bit of time to come back to work or other issues. I do things like taking kids on trips to kill two birds with one stone, different ways of ... a rhythm that I have of making sure my wife and I are staying connected. So lots of different hacks. I've made it a life study to figure out how can you have balance and be an entrepreneur.

Editor:

Sounds good. I mean, I think maybe there's a new book there, Clate, to be honest. Clate's Life Hacks, I think that would be a big seller as well. I can't believe you said you were a father of six.

Clate Mask:

Indeed.

Editor:

I mean, so that really is quite a challenge because I guess the children obviously different ages and obviously they've got different interests and desires and you have to be able to juggle all of that alongside being a CEO. I know a lot of people think that their time is stretched anyway. So it's interesting to hear from your perspective, how you are able to do so much and achieve so much, but also still have that work life balance.

Clate Mask:

Yeah. Well, a lot of people will say, "Oh, there's no such thing as work life balance. It's more about harmony." Leave aside the semantics of it, there is a way to have both and it just requires a lot

of intentionality as an entrepreneur. It's tough because entrepreneurship is enveloping, it can be all consuming and we love it and you lean into it. But if you're not careful, your relationships, your health, the things that matter most can really suffer.

Editor:

Absolutely. I mean, so you've started Keap. How long ago was that?

Clate Mask:

So we started the business back in ... Officially, we started it in 2001. It was actually 2002 when I joined, took about three years for us to figure out our product and our niche in the world and what we were doing with CRM software for entrepreneurs. Then it started to take off and we've been growing it ever since and been through all kinds of ups and downs and market corrections and product and business model adjustments, all sorts of things, but it's a tonne of fun. It's a real challenge every day and I love helping entrepreneurs.

Editor:

Sound amazing. Are you from an entrepreneurial family yourself, Clate?

Clate Mask:

I am. My dad's a teacher. My mom stayed home and raised six kids until my youngest brother, Jeff started going to school. Then she started a interior design business and just built it from the ground up and began to design model homes. Anyway, she was very entrepreneurial and most of my brothers and sisters are doing very entrepreneurial things. I come from a family of six and I think all but one or two are running their own businesses.

Editor:

Wow. How much luck would you say plays a part in what you do?

Clate Mask:

There's definitely luck. I have a lot of faith and so I tend to see it as blessing and divine providence more than just a dumb luck, but

there's no doubt that ... Let's put it this way. For all our best efforts, we can't control the outcomes as much as we'd like to think.

Editor:

That's very true. Very true. Who would you say are your heroes? Who do you look up to in both business and also perhaps even on a more personal level?

Clate Mask:

Yeah. You know in business, we have a few people who have mentored us over the years that I think are ... I'm super appreciative of. Certainly Michael Gerber in terms of small business. In terms of marketing, Dan Kennedy, Bill Glazer, and our very first customers, a guy named Reed Hoisington, just really good direct response marketers. Then in terms of building great companies, we're big followers of Jim Collins. We've had an opportunity to spend time with him. So those are some of the business authors, or entrepreneurial leaders that we really look up to. By the way, I'd also throw a Patrick Lencioni in there, his work is incredible.

Then just on a more personal level, my parents. I've got great parents who are just ... they're fantastic. They have a capacity to love and to inspire and build people up and I'm one of the beneficiaries of that. So I really admire the way that they build others around them and I've been really blessed with great parents.

Editor:

Sounds like as well, with you being one of six children, I mean, that shows that their dedication is certainly there. For you to feel so empowered and for them to have instilled the love and the passion, I guess, in you to be able to go out and achieve, I mean, that does certainly speak about them very much as well. Do they advise you? Do they still call you up and say, "Clate, we think you should be doing this with your business instead of ... "

Clate Mask:

It's funny you ask that. I'm a big believer in coaching and I went to them a few years ago and said, "Hey, I'd like to just do a little coaching session with the two of you and receive coaching from you." I pay a really high price coach to help me out. Over the years, I've either met with him once a week or once a month and I went to my parents and said, "I'd really like to get a little coaching from you." So we started back then meeting once a month, we still do that. Of course, I see them more often than that, but I see them at least that often. That session is all about getting a little bit of business and life advice.

Editor:

That's great, I guess, in terms of leadership as well, you could learn so much from them. If they've been, as you are now, a father of six children, leadership comes into being at home as well as being at the office, I guess?

Clate Mask:

Absolutely. Yeah, there's a lot of leadership required when you have a big family and four of them are now married and two of them have a child of their own. So our family is getting bigger and bigger and I'm leading an organisation there too.

Editor:

Yeah, it sounds it.

Clate Mask:

I got to be clear, she's the day to day leader and does an amazing job.

Editor:

So what is your ultimate goal? Both personally and professionally, I guess personally, it's got to be with the family, but what are your hopes for those guys and also for Keap moving forward?

Clate Mask:

Yeah. For my kids, I want them to be great husbands, wives, fathers, mothers, faithful, good people, hardworking, and they're doing that. I'm so proud of them, they're doing awesome. For Keap, I think the small business failure rate is astounding. I think that there's a very big difference between having a business and being an entrepreneur. I think that that difference is very much the difference between success and failure. So, my life's work in business is about helping small businesses become great entrepreneurs and helping people to be successful in their business because they are willing to roll up their sleeves and do the work, and they understand what work they need to do and just empowering them to do it. What we do here is we empower and liberate entrepreneurs from the frustrations and struggles that they experience that unfortunately, a lot of times causes them to quit the business.

So, we have a big mission to simplify growth for five million small businesses by the year 2030. That's all about an entrepreneurial movement and helping business owners become great entrepreneurs and teaching them the principles and how to do it and giving them the software to put it all into practise. So we have a big mission. It's something that isn't going to be accomplished in six months or a year. We've been up to it for 18 years and we'll be up to it for at least another 10.

Editor:

Yeah and I mean, as you say, the failure rate for small businesses is still incredible. When you think of how other industries now have evolved and how efficient some industries have become, but for those people starting out, those startup businesses, the failure rate still is way too high and Keap can help businesses to overcome some of those hurdles, I guess?

Clate Mask:

That's right. We teach a methodology called lifecycle marketing. It's really just a way for entrepreneurs to get their brain wrapped around their business and to understand that there are these three phases of

the customer life cycle. You have collecting leads and then converting them to clients and then creating fans out of those clients. Business can sometimes feel so dizzying and frustrating, but it's really as simple as that. Collecting leads, converting clients and creating fans. Then underneath that, there's three sub steps of each one and we teach that customer life cycle and then we give you a system to automate it.

When you do that, all of the techniques and shiny objects and different things you pursue as an entrepreneur get settled into place and you can put them into a system to help you run your business. The outcome is not just that you get more leads and more clients and more fans, but you get peace of mind and you're able to conquer the chaos, as we say in the book, and you're able to have a great business and a great life. That's really what our work is all about.

Editor:

I guess it also stops those prospects from, if you like, falling through the cracks-

Clate Mask:

Certainly.

Editor:

... because you have a systemized way of being able to follow up with every single lead that comes into the business. I know for many small business owners that I speak to, that seems to be one of the key problems that, of course the sales people will be chasing the hot prospects and therefore, the cooler prospects, shall we say, I think some people call them tyre kickers. The people that come in that actually need to be nurtured to come through into the business. They're the ones that sometimes get left behind.

Clate Mask:

Yeah. You nailed it there. One of the main problems that causes small businesses to not grow like they should is prospects slip through the cracks and they slip through the cracks because they're

not hot today. Virtually every business owner does a good job talking to the lead that's ready to buy today, you know?

Editor:

Yeah.

Clate Mask:

But most aren't. Most are interested, but the time's not right and they must be nurtured. Well, business owners don't have time to do that nurturing, which is why it doesn't happen. They've also told us over the years, "I don't have any system or process for doing that." They've also told us, "I'm not sure exactly what to do there. What to say, when to say it, all of those kinds of things." So Keap is a platform that enables them to nurture those prospects but get them to the point that you can convert them to clients and then more importantly, turn those clients into lifelong raving fans, but all along that customer lifecycle are pitfalls where valuable prospects and customers slip through the cracks.

It can be a prospect that gives you a business card, or you see at an event at the very beginning of your interaction, or it can be actually a customer that has bought from you repeatedly but doesn't realise that they've bought product X, Y, and Z, but you also offer A and B and they go to a competitor to buy A and B because you haven't nurtured that relationship and stayed in touch with them and created a true relationship where they look to you for the solution to their problems. That's what customer relationship management is. You manage the customer lifecycle and build that relationship, so that opportunities don't slip through the cracks.

Editor:

And that is a key thing for any business. So, I mean, for anybody who's listening right now, who is either thinking of starting a business, or already has a business, how can they find out more about Keap and also the solutions that you offer?

Clate Mask:

Yeah. We have a lot of learning resources on our site, keap.com dot, K-E-A-P.com. There's all kinds of things from blogs to reports and all sorts of resources that you can get there. That's probably the best place to go. You can learn more about lifecycle marketing there and how to think about your business holistically. Whether you use our software or another solution, we really are just trying to teach the world about lifecycle marketing, because it really does help the entrepreneur conquer the chaos that's going on in their mind and gives them a framework for how to successfully grow their business and not lose their sanity in the process.

Editor:

Sounds ideal. Sounds like utopia, but it's great that you have those resources. As you say, anybody that wants to find out more about Keap should go to K-E-A-P.com. Clate listen, it's been an absolute pleasure chatting with you. I really appreciate your time. Thank you for taking the time to join us today.

Clate Mask:

Thank you so much. Great talking with you.

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