
Module 16, Lesson 1 Handout:

Choosing the Right CRM or Email Management Platform

CRM stands for Customer Relationship Management, and it's simply the software that allows you to organize all your customer data. It helps you keep track of who is on your email list, where they live, what they purchased, what emails they are opening and clicking on and what they ignore, and what your engagement has been with them. It allows you to run reports and see a total picture of your business, so you can make great business decisions as you grow--or figure out why you aren't growing the way you want. If you have a sales person or customer service component to your business, it also allows you to integrate reminders to follow up, previous correspondence, and more. Many now also allow you to incorporate text messaging into your customer marketing efforts, and so much more.

If you ask 10 people which CRM or email platform is their favorite, you'll get 10 different answers, so it's very important to do your homework before choosing one for yourself. Some are much more user friendly than others. Some are more difficult to integrate into your site than others. Costs vary, too--and some platforms can be very expensive. Be sure you read up on a few options you are considering and really consider how you plan on using the software. Often, there are so many bells and whistles to uncover that you won't be able to fully utilize the features without a larger team or a ton of time on your hands, so don't get caught up in paying for nice-to-haves if you really won't be able to take advantage of them.

Some common CRMs include:

- Hubspot
- Salesforce
- Infusionsoft / Keap
- ActiveCampaign
- Klaviyo
- Sharpspring
- Ontraport

Email management software (or email service providers, ESP) is a more basic option than a CRM. It specializes only in sending emails, and doesn't have e-commerce capabilities. The biggest thing to

consider when choosing your email management software is budget. Some email platforms start out free, then increase in cost as you add subscribers.

When you're just starting out, a simple email platform like Mailchimp or ConvertKit can be great! But as you grow, you may need to build more robust email funnels or track sales all in one place. At that point, you may want to invest in a platform that can grow with you, like Active Campaign, or Ontraport, or one of the dozens of other CRMs.

- Mailchimp
- ConvertKit
- ConstantContact
- SendinBlue
- Emma
- Mad Mimi
- GetResponse
- Campaign Monitor

Now remember, new ESPs and CRMs are coming to the market all the time, and all of them are adding features and capabilities constantly. With the pace that technology moves, it's impossible to keep up with every single one on the market, and what you think might be right for you today may not be the best choice in a year or two, depending on how fast you grow.

So, be sure to do your research at the time you wish to make a choice and sign up with one, so the features they offer are current, and the competitive landscape is relevant.

Ask your peers or the TNS Community which options they like best, and start your research there. Chances are, the one you land on will not be the same one you have in a few years, so be ready to make changes as your business grows--because your needs will change.

Here is an exercise to help you choose the right path for your business:

CHOOSING THE RIGHT EMAIL MARKETING PLATFORM OR CRM		
Question	Yes	No
I am just starting out and haven't begun to build my list yet		
I already have an email list and am looking to grow it		

I plan on collecting just customer names and email addresses		
I plan on collecting as much customer data as possible		
I do not plan on selling anything on my website		
I am selling things on my website now and need to keep track of customer data		
I plan on selling things on my website in the near future and will need to keep track of customer data		
I will just be sending simple one-off emails and newsletters		
I will be sending customers through series of emails and newsletters automatically		
I have the desire and bandwidth to build customer email funnels		
I plan on having a salesperson or sales team or customer service representative to handle customer questions or concerns		
I plan on handling all customer questions myself		
I will need to run sales reports or other reports about my customers		
I would like to add text messaging into my marketing funnels		
I would like to speak to a human if I run into trouble using my software		
I am ok with just having access to live chat in case I run into trouble using my software		
I want the simplest solution possible, preferably DIY		
I am ok if I need to pay a developer to help me integrate a more robust system with my website		
I want a super simple Drag and Drop email builder to build my emails		
I plan on hiring someone to do my emails and html design is preferable		

I want super customized emails		
I am ok with some design limitations when I build my emails		
I want to be able to put emojis in my subject line		
I want to pay only one time per email address no matter how many lists I add them to		
I am ok paying for the same email address several times if I need to add them to different lists		

Once you have clarity using the exercise above on what exactly you need from an ESP or CRM, you can begin your research and find out who checks the right boxes for your needs, and within the budget you have to spend.