

Finding your ideal CRM & email software



The background of the slide features a traditional Indigenous Australian pattern of concentric circles and wavy lines in shades of red, orange, and black. A solid orange rectangle is positioned in the upper right corner.

Welcome to Country

We would like to acknowledge the traditional custodians of this land and pay our respects to the elders, past, present and future for they hold the memories, traditions, culture and hope of Indigenous Australians

Why are you here?

Have contacts in excel spreadsheet or still in business cards

Want to communicate but don't know how

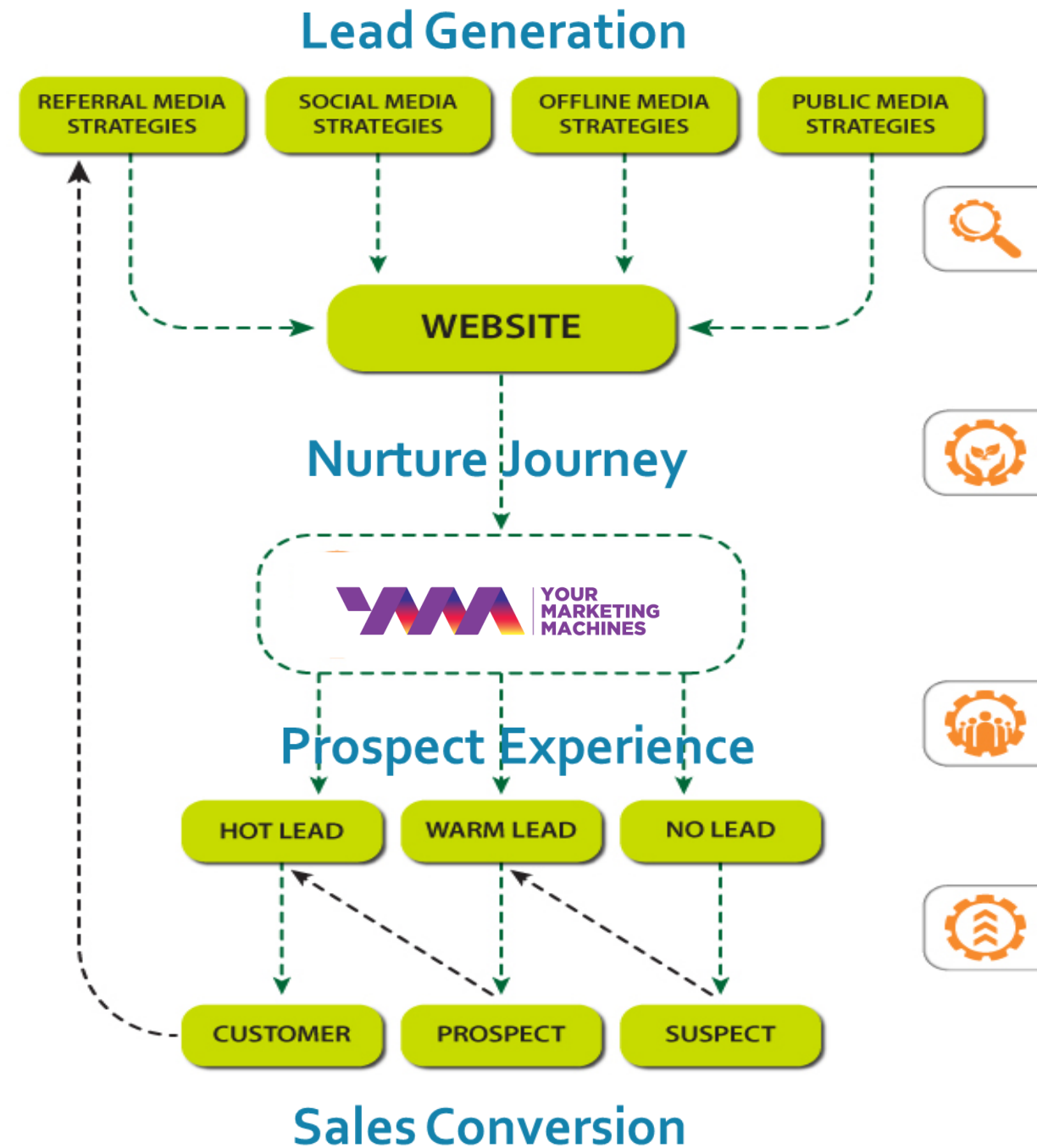
Told it is important

Need to make more money from my database

ALL OF THE ABOVE!

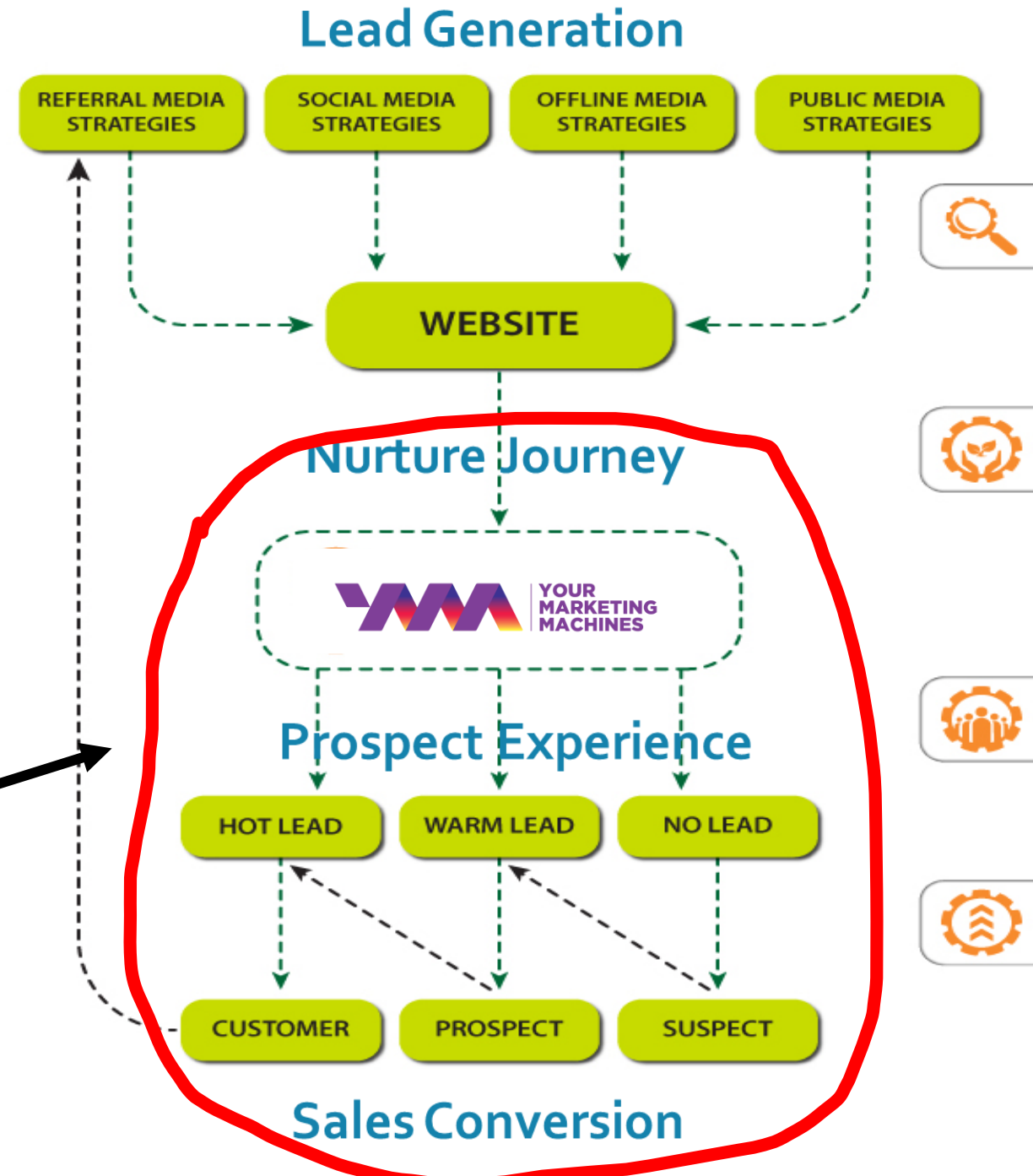


the power of leverage!





the power of leverage!



What you will learn...

What is a CRM & their benefits

Components of CRM

CRM vs Email Integration

How to choose for you

Create automated campaigns

What is CRM



What is CRM...Customer Relationship Management



Wikipedia states, “is an approach to manage your potential and current customers”



It is the data analysis about customer history with a company to improve business relationships



A range of communication channels ranging from website, email, social media, live chat, telephone and marketing materials

8 Benefits to you...



Better client relationships



Ability to cross-sell



Team collaboration



Customer service efficiency

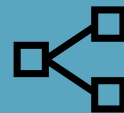
Benefits to you...



Bottom line profitability



Increased client retention



Greater average spend per customer

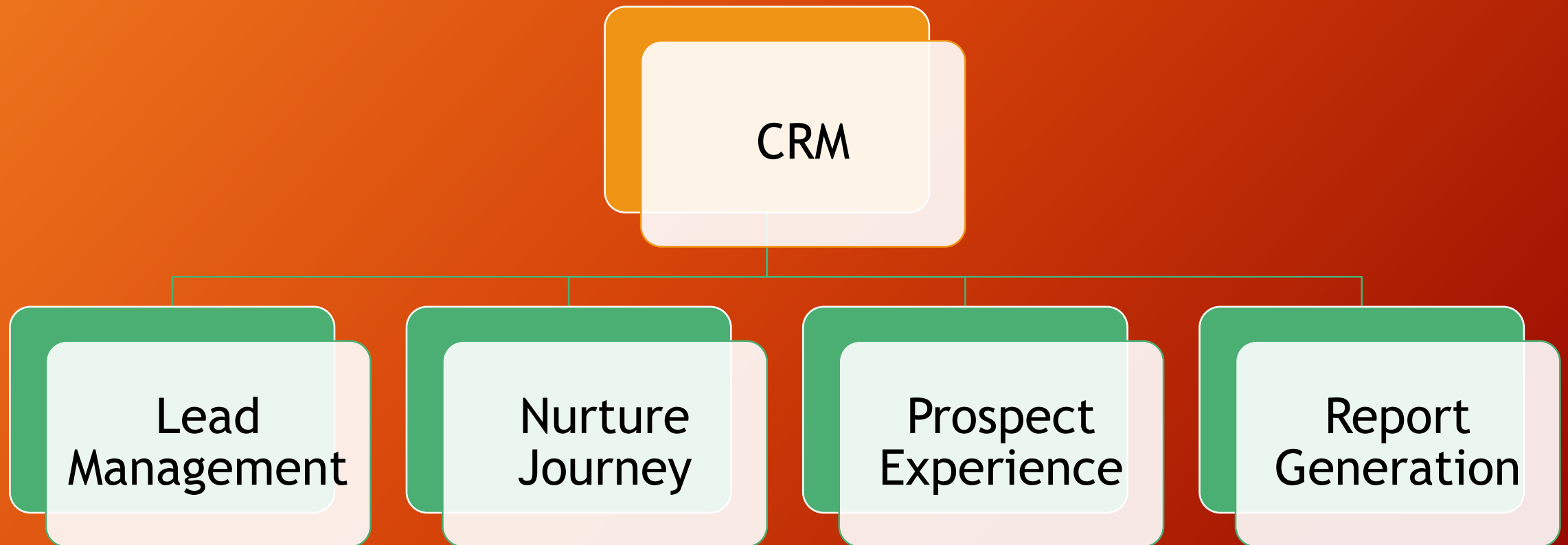


Reduced marketing spend



Components of CRM

Components of CRM



Lead Management...

Access to
crucial contact
information
such as

Demographic
details

Conversions

Lead score

Recent tickets

Activity on your
website (if
connected

Allow to make
phone calls

Collect
accurate data

Nurture Journey...

- Reduces double handling of data
- Allows easy follow-up of your clients
- Track open rates and click throughs
- Send messages to specific audiences

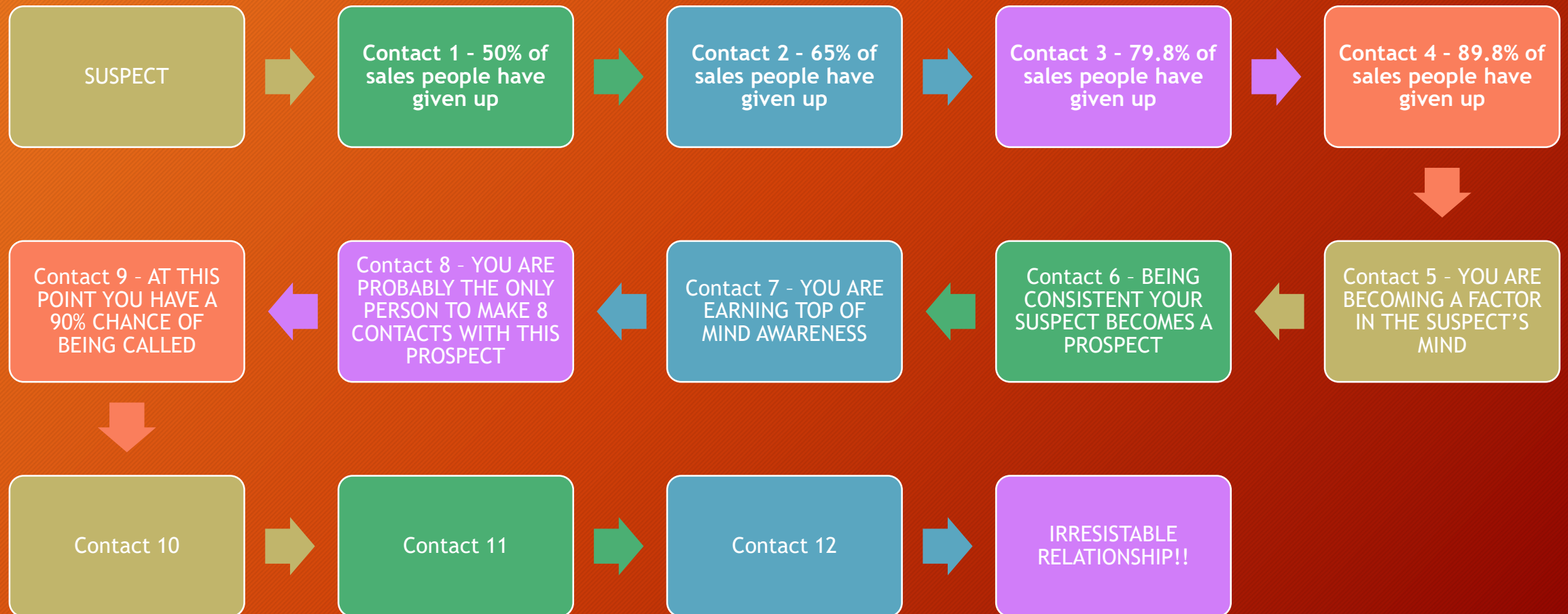


Prospect Experience

- AKA - Pipeline Management
- Allows for multiple phases before the lead decides to buy
- Part of the decision-making process heading towards YES
- Content is King!

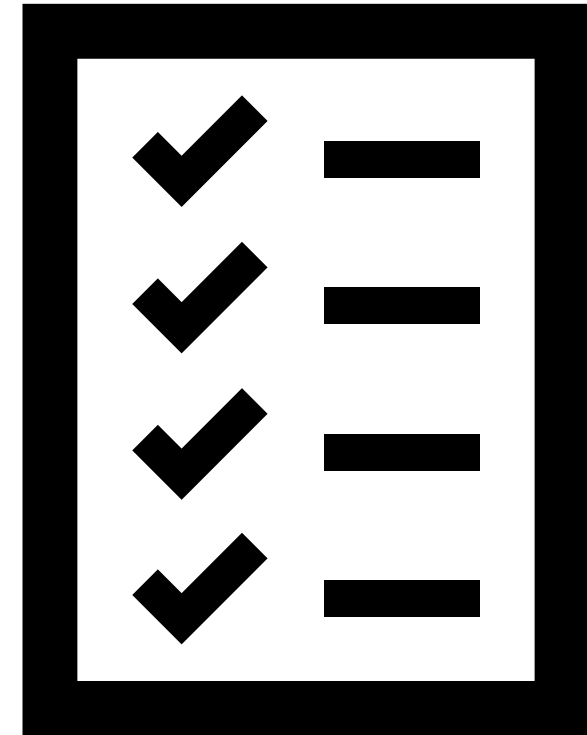


Prospect Experience ... the customer relationship model



Report Generation...

- Lead conversion
- Conversion rates
- Closed deals
- Size of database
- Population percentages
- Open rates/bounce/unsubscribes



What do I need in my CRM?

Demographic	Psychographic	Geographic	Business
Name	How met	Suburb	Industry
Email	Likes	Post code	Size
Phone	Dislikes	State	Transaction value

Who is going to be my CRM Champion?

Consider...

- Expertise
- Time investment
- Content writing capability
- Data analysis expertise



100

pipedrive™



insightly

 Microsoft Dynamics™

vs.

Infusionsoft®



MailChimp

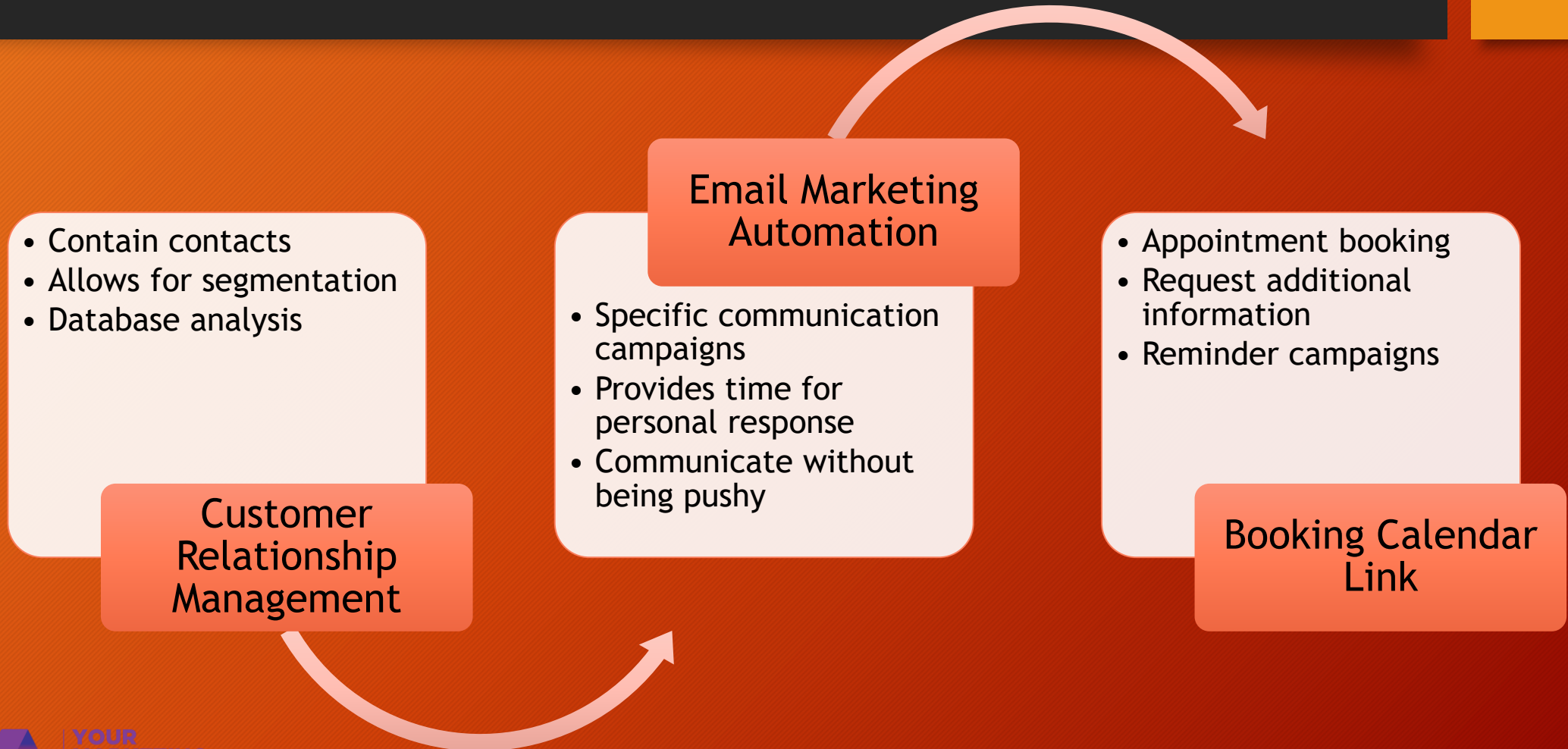
 monday.com

keap

ActiveCampaign >

HubSpot

Software Integration to create leverage



Hubspot...

- Excellent choice for small business and first time CRM users
- Is free for basic program but increases with more functionality
- Simple to use as CRM and Pipeline
- Has both Sales and Marketing Dashboards
- Allows for some email marketing
- Can integrate with Office 365
- Start from AU\$68 per month for 1 user to AU\$1620 per month for 10 users



Keap...



- Baby brother of Infusionsoft
- Great for small businesses with up to 2000 database
- Integrates CRM, Email Marketing, payments, Lead Scorecard
- Automated campaigns & tag system
- Separate/group based on behaviour
- In-built dashboard
- Price starts from AU\$139 per month

Infusionsoft...

- The Granddaddy of CRM
- Perfect for 3000+ database and regular use
- More than a monthly newsletter
- If high number of transactions
- One stop automated platform if customer/sales driven
- Integrates with other software
- Price from AU\$190 per month for 5000 contacts for marketing automation



ActiveCampaign...



- Designed for small businesses
- Only pay for what you need
- Automate lead prioritisation and contact management
- Seamlessly create engaging emails & use social media marketing
- Has over 100,000 users worldwide
- Over 150 integrations
- Price range from \$15 pm to \$279pm with 3 to 50 users

Mailchimp...

- Email marketing service that can handle large volume
- Can set up automated campaigns
- Offers business-enhancing analytical features and strong technology tools
- Easy to use and affordable
- Free for up to 1800 contacts
- Prices start from \$10pm to \$199pm

MailChimp

Implementation Plan - What do I need?



What data am I going to collect?



What am I going to do with the data?



How often am I going to communicate?



Am I going to segment the database?

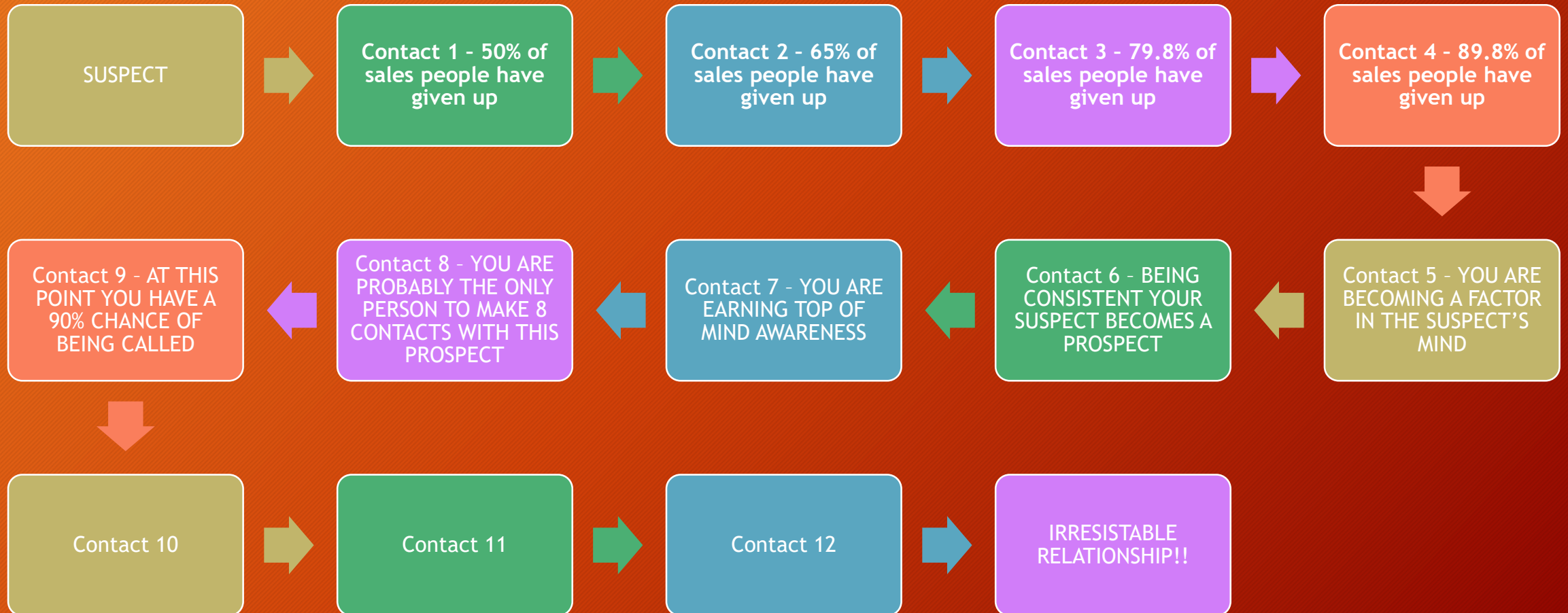


Which CRM tool will best suit me?



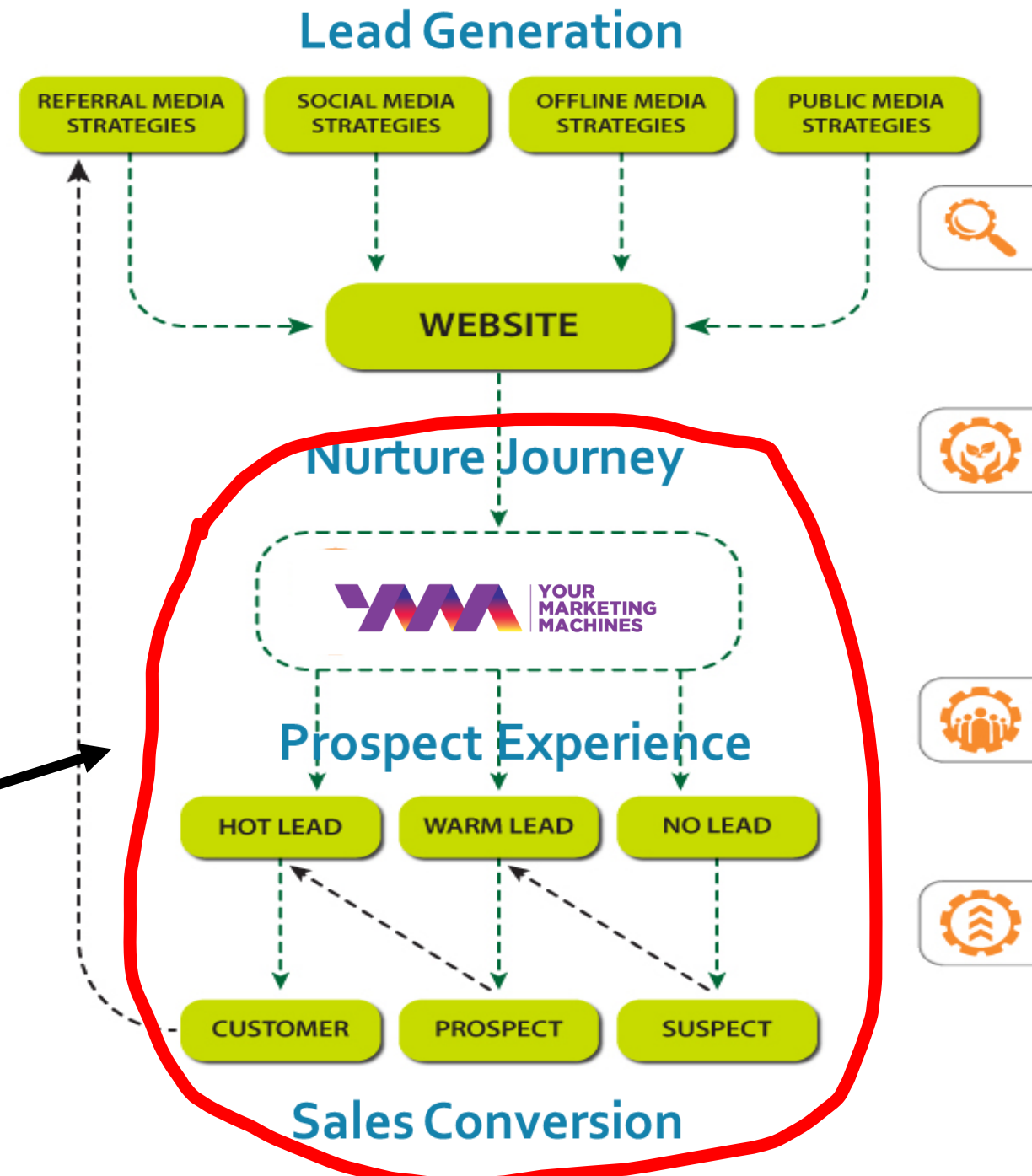
What will I say?

Prospect Experience ... Map out What you Want





the power of leverage!



Your Next Steps

- Book for the next workshop - www.asbas.rdadbrisbane.org.au
- Book for your 1 to 1
<https://adams.businessstation.com.au/Identity/Account/Login>
- Join me on my next webinar -
- Create a Sales Team You Don't Have to Pay for, but makes you thousands in revenue! Wednesday 18 September 6pm to 7.30pm
- Using Mailchimp to increase customer engagement & profitability. Wednesday 25 September 5pm to 6.30pm

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