

# WHICH EMAIL MARKETING *Platform* SHOULD I USE?

It's frustrating to keep trying different email marketing systems and getting down the line with one before finding it can't do what you want to it do and having to start over. It's also overwhelming looking at all the options.

Here is a 2-part process to analyse them for your particular situation and business.



## Section A

Answer these 11 questions:

**1.** How many contacts do you have right now?

**2.** How many will you have in 2 years' time?

**3.** How technical are you?

**4.** What are the essential functions to make it do what you want?

**5.** What are non negotiable features for the way you like to work?

**6.** What are your 'nice to haves'? Rate each NTH with how much you'd like it between 1 heart and 5 hearts.

**7.** What is your budget?

**8.** What is a red flag for you? (E.g. about the company, how long they've been in business)

[Empty grey box for answer]

**9.** How important are each of these features (decide Important or Not and dismiss the 'Nots')

- |   |  |
|---|--|
| <b>1.</b> Graphical email design (FYI we advise against this) | <b>9.</b> Using tags   |
| <b>2.</b> Tracking  | <b>10.</b> Integration with your website platform  |
| <b>3.</b> Integrated shopping cart/payment system             | <b>11.</b> Integrated page builder   |
| <b>4.</b> Integrated CRM                                      | <b>12.</b> Integrated affiliate partner sales tracking platform  |
| <b>5.</b> Reporting   | <b>13.</b> Having a lot of Custom Fields (so you can ask for any info you want rather than what the system prescribes) |
| <b>6.</b> Tracking  | <b>14.</b> Phone support   |
| <b>7.</b> Automation  | <b>15.</b> Live chat support   |
| <b>8.</b> Segmentation  |  |

**10.** What is the most basic email marketing function you need it to do?

[Empty grey box for answer]

**11.** Draw out what you'd think of as a fairly standard email marketing funnel/system/flow.

[Empty grey box for drawing]

## Section B

Now you're going to use the answers to the questions on the previous page to assess the different email marketing platforms for your specific needs.

Open up each of the email marketing platforms (see the links to a lot of them in your members' area) in a new browser Tab and then go through each web page to look for the following, in this order:

- 1.** Does it offer your essential functions (A4)? Close all of the tabs that don't.
- 2.** Does it include all of your non negotiable features (A5)? Close all tabs that don't.
- 3.** Does it have any red flags (A8)? Close all that do.
- 4.** Of those remaining, which 5 has the highest scores in the Nice to Haves (A6)?

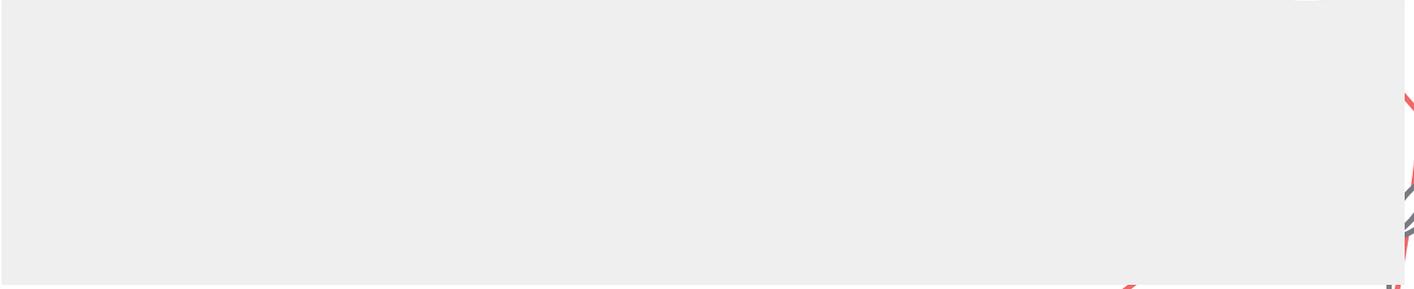


- 5.** Do you know anyone who is using this system? (Make a social media post and ask 'Who do I know who uses X, X, or X?' If no one you know uses it, deduct a few points.

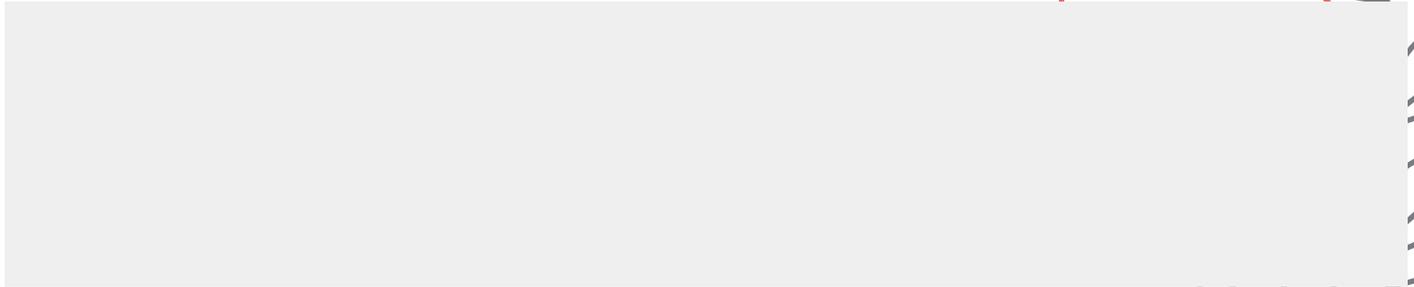
- 6.** Of the ones remaining now you're going to take a free trial or book a demo where you will...

- (a) Build the most basic email marketing function (A9) and then
- (b) Build a standard one (A11).

- 7.** Make notes as you go about things you hadn't thought of that are nice to have and score them 1-5 hearts.



- 8.** Make notes of any red flags and score each individual red flag 1-5.



- 9.** Anything that can't do what you want it to do, close the tab.



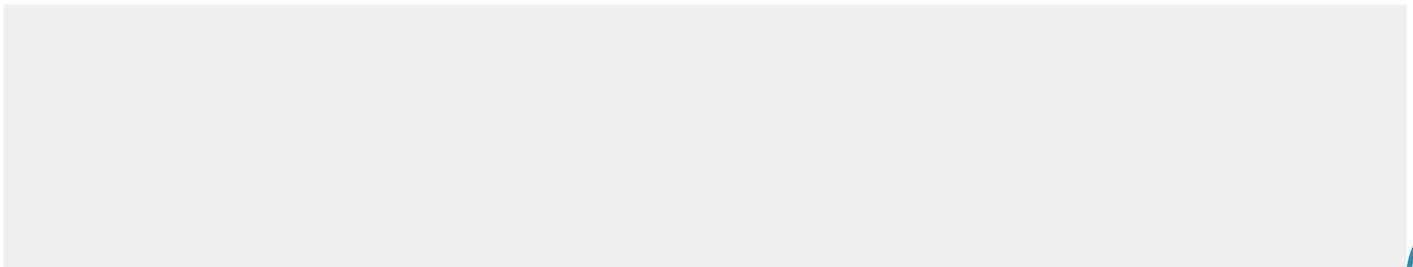
- 10.** Of all the important features (A9), rate each of the features you kept as Important out of 5. Close any that don't score at least 3.5.



- 11.** Now rank these in order that you enjoy using them.



- 12.** Look at the prices of the remaining ones and rank them in order of price for how many subscribers you will have in 2 years' time.



- 13.** Now place the two lists (B10 and B11) side by side and decide which one to proceed with based on weighing up price and enjoyment of using them.

