Autoresponder, Shopping Cart and CRM Technology Guide In Plain English For Busy Business Owners

Clients and colleagues often ask me to recommend online marketing tools and services for automating and improving their online marketing efforts.

Here are some of the tools with which I have direct experience, and the pros and cons of each.

Unless you have at your disposal an army of IT people, it is NEVER a good idea to build your own autoresponder systems, shopping carts or CRM systems.   There are very good systems already available, so why reinvent the wheel?

Even if you do have an army of IT people, if you're sending emails to prospects and clients (and you should be), it's essential that you use a **third party system** to manage your email delivery. Here's why:

With the torrent of spam out there, Internet Service Providers (ISPs) such as Gmail, Yahoo, Hotmail, Bigpond, Optus etc. routinely filter (i.e. delete) bulk emails.

- If you are not "white listed" with major email service providers, your messages may get eaten straight up, even if your list is 100% opt in and you have never sent spam email in your life
- If any of your email recipients hit the "Report Spam" button or lodge a complaint about you, your sending address or mail server may be blacklisted by ISPs
- Taking on the whitelist / blacklist challenge directly with ISPs is literally a full time job

For these reasons, it is highly recommended to outsource your email to a third party.

This third party service provider will keep your database for you as well as send email follow ups and broadcasts on your behalf.

What's more, the best providers have long-standing relationships with ISPs, which means their delivery is very good – 98% or more in some cases.

> *NOTE!* Choosing your email autoresponder system is an important decision. In order to ensure the integrity of their anti-spam policies, many email systems DO NOT allow you to import an existing email list without at least a "double opt in" requirement (i.e. making everyone who is added to the list **confirm** they still want to receive messages from you).
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> This "double opt in" requirement has the effect of significantly reducing your list size, so it pays to choose the right system from the start.

AUTORESPONDER SYSTEMS VS SHOPPING CARTS VS CRM SYSTEMS

At this stage, it is worth discussing the similarities and differences between email systems, shopping carts and Customer Relationship Management (CRM) systems.

> ➤ An **email system** ONLY handles the sending of follow up messages and broadcast emails.

> ➤ A **shopping cart** enables you to transact orders and take payments online, but you should keep in mind that when a customer orders, they need to be taken off your "prospect" list and added to your "customer" list. That's why your email system and your shopping cart need to be able to "talk" to each other. If your email system and shopping cart are NOT integrated in some way, you'll end up with multiple databases and a world of confusion.

> ➤ **CRM systems** allow you to keep track of your prospect and customer information, contact history and sales pipeline.
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> They typically DON'T offer sophisticated emailing functionality (e.g. sequential autoresponders), despite manufacturer claims. That means you may need BOTH an email system and a CRM system. Depending on your exact situation, that could either be a very workable compromise or an IT nightmare – see below.

> *NOTE!* If you have affiliates, or a complex sales process, or a variety of online and offline campaigns you wish to track, your situation is more complex still – great care is recommended to choose a system that will work in both the short and long term.

Below are a number of technology options that I have direct experience using, have extensively tested, and regularly recommend to clients:

Autoresponder systems

[Aweber](#) – if your main requirement is a good email list management system that is easy to use, with a range of powerful functionality if you need it, Aweber is one of your best options

STRENGTHS:

- Very nice interface – easy to set up and use

- Best deliverability in the industry – approximately 98%

- Excellent reporting capabilities

- Extremely useful testing functionality (e.g. you can test signup forms and email variations and receive reports on the effectiveness of each version)

- Excellent support desk and resource library

- Integrates well with most other shopping carts and systems, including Marketer's Choice / 1ShoppingCart (see below).

- Cost-effective monthly billing based on your total list size (not pay-per-email). As a guide, a list of 500 email addresses costs US$19 per month.

WEAKNESSES:

- In order to preserve its very high delivery rates, Aweber is very anal when it comes to importing lists – existing lists have to be imported with a double opt in requirement. In most cases, this is more of an inconvenience than a deal-breaker

MOST SUITED TO:

Email newsletter management and sending White Papers or Special Reports with sequential follow up emails. Can be used to deliver electronic products or information over a series of days or months. Very suited to most enquiry-generating websites (as opposed to e-commerce websites)

[iContact](#) - easy-to use, versatile autoresponder system with good deliverability and no double opt-in requirement when importing existing lists.

STRENGTHS:

➤ No double-opt in requirement when importing existing lists – if you have a large existing list, iContact may be an excellent solution.

➤ Similar to Aweber – good deliverability and easy to use

WEAKNESSES:

➤ In terms of functionality, Aweber is the winner, although the ease of importing existing lists is a very useful feature.

Shopping Carts

[Marketer's Choice / 1ShoppingCart](#) –an excellent shopping cart solution for the majority of small businesses, consultants and information marketers

STRENGTHS:

➤ Easy to set up and edit new products

➤ Integrates easily with a large number of credit card payment gateways and merchant account providers

➤ Computes sales tax, shipping charges, bulk discounts, special offers etc

➤ Has a full-featured affiliate system

➤ Detailed reporting tools and campaign tracking is built in

➤ Autoresponders including list management of unlimited lists, follow up messages and broadcast messages

➤ Pay-by-the-month billing means you can get a full-featured shopping cart for very little up front investment

Although *Marketer's Choice* does come with an integrated autoresponder system, it is not quite as easy to use as *Aweber*'s product. My recommendation is to use *Marketer's Choice* + *Aweber* instead of relying on *Marketer's Choice* alone. The small incremental investment is more than worth it.

WEAKNESSES:

➤ *Marketer's Choice* also has a double opt in requirement when importing lists.

➤ It is possible to "outgrow" the functionality of *Marketer's Choice*, although this is not likely to occur until you're transacting over $1 million dollars online annually.

MOST SUITED TO:

➤ Small and medium-volume marketers who require a robust and versatile shopping cart system

InfusionSoft – high-end, integrated autoresponder, shopping cart, affiliate program and CRM system in one. A direct marketer's dream come true.

STRENGTHS:

➤ Combines the best of Aweber and 1Shopping Cart into one product (plus tonnes more functionality on top)

➤ Combines ALL your online and offline marketing data in one place

➤ Supports seamless integration of multi-channel, complex sales processes.

➤ Also supports OFFLINE marketing methods including direct mail, direct faxing, voice broadcasts etc.

➤ A sophisticated tool for sophisticated marketers – proper deployment of all this functionality should lead to 200 to 300% higher marketing ROI.

WEAKNESSES:

➤ InfusionSoft is substantially more expensive than the systems above (about US$299/month)

➤ Because of all the functionality supported, it is much more complex and there is quite a learning curve (well worth the effort)

Salesforce.com – leading online-based CRM system, combining a very slick interface with extensive functionality – but beware the price tag

STRENGTHS:

➤ The largest player in the online ("Software-as-a-service / SaaS) CRM space with the most mature technology

➤ Easy to use and customise

➤ Manages contacts, leads, opportunities and sales

➤ Can be used in concert with an autoresponder system such as Aweber, albeit WITHOUT full integration of databases.   This means you need to keep your "prospecting" emails (e.g. newsletters) separate from client contacts.

WEAKNESSES:

➤ Quickly gets expensive if you require a large number of users or advanced functionality

➤ Not effective as a complete email autoresponder system (and add-ons come with a high price tag)

➤ Extending the functionality often involves additional investment

[Zoho CRM](#) – an excellent alternative to Salesforce.com that is not *quite* as slick, but comes at a fraction of the price.

STRENGTHS:

➤ A very good alternative to Salesforce.com that offers much the same thing at a fraction of the price (with up to 3 users FREE)

➤ Easy to customise and get data in and out.

➤ Can be used in concert with an autoresponder system such as Aweber, albeit WITHOUT full integration of databases. This means you need to keep your "prospecting" emails e.g. newsletter separate from your client contacts.

WEAKNESSES:

➤ It doesn't have the bells and whistles offered by Salesforce.com (which 99% of small businesses don't need anyway)

We have set a number of clients up with Aweber to manage email lists, and Zoho to manage customer contacts.

If your business has a relatively low number of clients but a high average transaction price (e.g. consultants, big ticket products), this is often a very workable solution.