

ATTRACT CLIENTS ONLINE

Tech Training

What is CRM?

- Customer Relationship Management
- Technology that manages a business's customer and prospect relationships

Your CRM Needs to Have...

1. Tag based capabilities (ideally)
2. Integration with your page builder
3. Integration with your automated webinar service
 - Most CRMs have all of these through their API, but double-check
 - Zapier integration
4. Ability to make automated decisions
 - Example: If contact meets criteria A, send email A. If B, send B.
5. Integration with your order processing/checkout system
6. Ability to send automated emails
7. Ability to add/remove (or start/stop) specific email sequences after specific actions
 - Example: If contact registers, clicks, buys, etc.
8. Ability to send broadcasts to specific audiences
 - Example: Buyers who haven't seen webinar A
9. Ability to track notes on specific contacts
10. Ability to create custom fields
11. Ability to create forms that collect additional information (possibly Custom Fields)
 - Particularly for Strategy Sessions, you need more than name/email/phone.
Consider collecting fill in the blank answers to inform specific conversations.
12. Stats reporting (opens, clicks, opt-ins, leads, purchases, etc.)

Ideal (but not necessary)

13. Ability to add tracking/automation triggers on pages
 - Generally tracking code/pixel you add to a page, similar to Google Analytics
14. Ability to track deliverability or stats per inbox provider

CRM Recommendations

- Infusionsoft
- ClickFunnels
- Ontraport
- ActiveCampaign
- Drip
- MarketHero
- Maropost (Enterprise)

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- ... and a variety of others

Page Builders

Need:

- Integration with your CRM
- Ability to edit header (add tracking codes)
- Ability to host pages on your domain
 - You want **yourdomain.com/mypage**, not `yourname.pagebuilder.com`
- Ability to add/edit text, images, buttons, HTML, video, height width, colors, etc.
- Ability to control thank you page
- Ability to remove menus

Ideal:

- Drag & drop creation
- Templates
- Stat tracking (clicks vs. opt-ins, etc.)

Options:

- Wordpress with the right plugins
 - ThriveThemes, OptimizePress
- Leadpages
- Clickfunnels
- Unbounce
- ... and a lot more

Webinars

Need - Live:

- Audio + Slides
- Ability to create & send a link to join a webinar at a specified date/time
 - If you're controlling registration this is really all you need, because you can send out a link with the specified date/time.
- Ability to send links to viewers at specific time
- Ideal:
 - Control over registration & thank you pages
 - Control over email follow up
 - CRM integration
 - Automatic recording & replays
 - Data reporting (show up, stick through, drop off times, etc.)
 - Chat functionality
 - Chat recording
 - Automatic button at specific time (or on command)

Need - Evergreen:

- Audio + slide upload or video file

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- CRM integration
 - Ability to apply tags/start automation for registrants, show ups, and completed webinar
 - Ideal - Apply tags/start automation at specific time intervals
- Add button or link at specific time code
- Automated CRM follow-up or integration
- Ideal:
 - Chat recording
 - Tracking of link clicks
 - Show up/stick through stats

Options:

- Live: Zoom
- Live: GotoWebinar
- Live: Demio
- Live: Webinar Jam / Evergreen: EverWebinar (same company, separate products)
- Both: Stealthseminar

Video Hosting

Options:

- YouTube
- Vimeo
- Wistia
 - Paid option that has deeper information reporting (drop offs, especially useful for VSLs)
 - You have full control of the player, unlike YouTube, so you can add your own end screen, links, redirects, and even collect emails in the video embed.
 - With certain integrations you can also tag contacts with different follow up sequences if they watch a chosen percentage of the video.

Order Processing

- Need:
 - Ability to collect payments
 - Upsells (or integrations with upsell programs)
 - Control over order form look/feel
 - CRM integration
- Options:
 - Stripe
 - Paypal
 - Merchant account (Authorize.net, others)

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- Infusionsoft with integrations
- Clickfunnels with integrations
- Membermouse with integrations
- SamCart
- ... and hundreds of others

Tracking & Analytics

- Need:
 - Google Analytics
 - Ability to add tracking code to the header of **any/all** of your webpages
 - Wordpress plugins will do this
 - Competency with spreadsheets
 - Ability to monitor total opens, clicks, leads, sales, and upsells in your CRM/Analytics
- Ideal: Google Tag Manager
 - Add tracking codes to pages very easily, but a challenge to set up
- Consider:
 - Visual reporting software such as Google Data Studio (free) or Wicked reports (expensive)