Welcome to Easy Email Marketing. I'm your host, Yael Keon, Mum, FIFO wife, MBA, coffee lover survivor super fan and creator of the email experience. In Easy Email Marketing, you'll benefit from my nearly 20 years experience where I'll be teaching you all the tips, tricks, and insider info on how to create feel-good non-spammy experiences for your subscribers.

Let's get stuck in. Welcome back to Easy Email Marketing. I'm your host, Yael Keon and today's episode is especially for those of you who offer services and answering the biggest question I get, which is what's the best software for me. Now I have done a more general episode about choosing the "best" email marketing software way back in episode five,

but that was a couple of years ago and while there haven't been any major changes, I thought it was time for an update and perhaps focusing in specifically on different business types. So a few weeks ago I did one focus on e-commerce businesses and now it's the turn for service-based businesses. So during this episode I'll be looking at a few of the most popular options,

some key things you need to know about each and how to make the best choice for you. Now of course, I can't cover every piece of software out there as there are just too many to choose from and that would be an impossible task, but I will talk about the ones that have come up most often in my conversations with clients and email experience students.

This is also very high level information as I don't want to be here talking for two hours. And my quick disclaimer is that I'm doing my best to accurately represent the features and plans, but these software can change anytime. So this is accurate as of June, 2023, but of course email marketing softwares can change these features and their pricing at any time. So please make sure to do your due diligence in reviewing their pricing and planning options when making your selection.

Finally, before I get stuck in, I just wanted to let you know I'm putting together a free ActiveCampaign Essentials Masterclass, which I'll be hosting live in a few weeks. On July 20th, there will be a replay available. So if you are using ActiveCampaign and you're feeling a little bit overwhelmed by all its features or it is something you are interested in exploring, I highly encourage you to sign up to it.

You can register at yaelkeon.com/activecampaign. Okay, let's talk services and really when it comes to services and email marketing, there are two main considerations that I want you to think about that perhaps other business types don't need to think about. So all email marketing software will typically do the same thing in terms of, you know, growing your email list, having welcome sequences and perhaps adding in some other automations.

They all do that stuff, but services have a couple of unique

considerations. The first one is knowing who is a client and who is a lead, who is a past client and perhaps when they had their last appointment booked or when they had their next appointment booked. Because all of this information is important to know within your email marketing software. At a very basic level,

just even knowing who is already a client or who has already had a discovery call with you or who is a lead means you can exclude those people from any time you're doing like some big promotion of your services for example. But going deeper, if you had information about their, you know, booking dates or their types of appointments that they have, you can actually start to use email marketing tools to create great onboarding experiences or offboarding experiences or getting those testimonials or just simply sending out some rebooking reminders,

all of that kind of stuff. So that is something very unique to service-based businesses and we need to get that information from somewhere. And in most cases, that comes from either like your CRM, so your customer relationship management system or your booking software. So your Calendly or your Acuity or your Sato, you will have some place where people are putting in this information and then it needs to come through at least at a high level to your email marketing software.

Now sadly, a lot of it doesn't directly integrate. So this is what we need to look up. We need to go ahead and look up whatever you're using now and see if it integrates with some of the software I'm suggesting or other software. Unfortunately, some of them don't integrate to anything, which is of course the bane of my existence and not even to Zapier.

And if that's the case, sometimes we have to get really, really clever using some sort of Stripe integrations and doing some big workarounds. Some will integrate only with MailChimp, which is unfortunate because as you'll see in this episode, I believe there is so much more potential with email marketing using other software. But if that's what you can link to and that's the only software you know,

that's the only email marketing software it will link to, then that's what you go with. The other option is of course if they do integrate with something like Zapier, you can connect the dots that way, but obviously a direct integration is always preferable to something that uses a third party tool. So that's just something to think about as I go through this episode because absolutely you want to have that information come through.

Yes, with any email marketing software you can do the list growth, you can send those emails, but having that extra layer of information makes all the difference. The second thing to consider is what else you want to be doing. So often I do find with service-based businesses that sometimes you know you've got that capacity limit, you've got that you can only do so many appointments in a

day,

you can only bring so many people onto your team. So you're looking for other ways to leverage your income and generally that takes one or two parts, which is doing some sort of e-commerce or adding some products into your offering or perhaps adding some digital offers like courses or memberships, et cetera. In both of those cases, we need to look at having an email marketing system that can support that as well.

So even if you've only got some basic e-commerce stuff in place, we still want to be able to have some basic e-commerce automations and we want to know who's purchased products, et cetera. And if you are doing, if you are looking to launch a program or something, obviously having a list growth and having that scalability and having, you know a lot more email marketing effort is really,

really important. And one other thing that I will mention here that's maybe not so relevant just to the software selection specifically, but just something to keep in mind is when we're talking about email marketing for services, we are really thinking it is a long-term relationship. So when we offer a service, we are not just asking people for their money, we are asking them for their time.

So the sell is often a longer process. For some things like getting a haircut, it might not be that huge a deal because people are like, okay, yep, I just need to get that done. That's just part of my standard routine. But sometimes we've even got that layer of asking people to invest in themselves or to make some sort of change.

So for all of this, that means we need to spend the time nurturing our customers. We need to have perhaps automations in place that are offering that deeper level of connection and we are just continually showing up. So email marketing is crucial, but it might not have the instant results that something like an e-commerce store might have. Okay,

that's my big overarching thoughts. Let's get into kind of the three options I think you have. The first option is just using your native email marketing within whatever software you are using for your CRM. So this could be, this is like your Salesforce or your HubSpot or it could be highly industry specific like Cliniko. Obviously there are way too many of these for me to mention and there are so many obscure ones that I have come across that we try to work with and they all offer different feature sets,

but this is basically wherever you manage your sales process, especially if you've got a sales team, but even if it's just you and you're just managing, that leads to sales process, you're managing your appointments and you're tracking all the information about your clients within the software. Now some of these do have email marketing included, not all, but I am going to use email marketing with a big asterisk next to it because personally being the email

marketing expert,

I find these systems very insufficient on the email marketing side of things since it's not what they were designed to do. It's just like this little add-on so they can be great for doing a lot of the client based work. So sending the forms out, sending reminders about appointments, onboarding and offboarding, it can be really good for those and they might even allow you to send newsletters.

But beyond that, things like pro list building through lead magnets or masterclasses or creating like a welcome series or a sales funnel or you're doing any sort of segmenting or any type of automation really that's beyond just like an instant delivery. Normally this is out of their scope. So initially you might find this sufficient if you still have a way that people can sign up to your list and you can support your clients and you can send out newsletters and you're getting enough sales,

then go for it, stick with it. I'm not gonna tell you you need to have a dedicated email marketing software. And it can be handy to have things all in one place. However, if list growth is a priority for you, if you aren't getting the sales that you want in terms of your lead nurturing side of things,

then looking at a dedicated email marketing platform is probably something you should be doing. Which leads me to option two, which is your entry level options and these give you the basic features at a lower price point but don't include necessarily a lot of the fancier ones that you might look at, like some of the fancier automations. So the most popular option and the one that is most heard of is of course MailChimp.

I've already alluded to it. Some of these CRMs say "we integrate with email marketing" but they only integrate to MailChimp. And I don't actually consider it entry level pricing anymore as it does have a free plan, but it just does not give you the email marketing capabilities that you need. But you can start relatively low at about $20 a month for about 500 contacts on the essentials plan.

But for full features and to get the most outta the automations, I just recommend going with standard and that starts at about AU$30 a month for 500 contacts. So for that you'll get the ability to have a few different audiences, although we want to try to minimize that as much as possible and create great automations. However, if you did wanna have multiple lead magnets or you had multiple ways in which people can sign up to your list,

this can become a challenge in the way that lists and audiences are managed. So everyone just gets added typically to the same list, whether they're a client, a lead or a subscriber. And because of that it can be very difficult to say who gets what, like welcome automations for example. So you need to get clever with a lot of workarounds.

You can't just say, everyone who joins my list gets this same welcome series because often your welcome series will have a promotion at the end which says book in with me, but we don't want clients to get that for example. So we would need to use some filtering to filter them out, whereas instead with other software, you can have them enter in different ways,

create different experiences based on how they enter, but then merge them into one newsletter list together. And that newsletter list or group does not trigger any automations. But if you are curious about MailChimp and my top tips about how to get the most out of it, check out episode 26 where I talk in more detail about it. Personally though, if I were looking at entry-level software,

I would instead go with something like MailerLite and this gives you all the same functionality and more for free for up to 1000 subscribers. Plus you have the added feature of groups, meaning you can easily manage and send emails to different groups of subscribers based on actions they have taken. So based on the different ways they have signed up, you can create different experiences for them,

send them different welcome emails and you can do things like send an onboarding sequence for your clients for example. So I go into a lot more detail about MailerLite in episode 29, so you can definitely check that out. I've been playing a lot with this lately as I have been re-recording the whole MailerLite tutorial section for email experience students. And I admit there are some really cool features in there,

like the groups I've just mentioned, their automation capabilities are pretty good. You can add in some e-commerce stuff and even like they've got this really cool surveys feature within their emails, which you know, I absolutely love. So have a think if you're going entry level personally, I would lean more in the MailerLite direction. It just comes down to does it integrate and can you link up the two systems?

And so sometimes with that integration, maybe it just means that you might have to use Zapier to link up the the two together. And within the email experience, I actually show you how to do all that, how to structure all of that. So if you're curious, go to yaelkeon.com/experience. And finally option three is going more advanced into multipurpose platforms.

So this is where I was talking about if you were doing more than one thing. So if you're adding in so e-commerce or you are adding in running online programs, you might want to have something that enables you to do all of this and really separate out your subscribers into their unique groups based on you know, what type of thing they've been buying, what they're engaging with.

So MailerLite can actually do this quite effectively and it does have some e-commerce features. It won't give you all the bells and whistles of e-commerce dedicated software, but if they're just a

small extra need, you could do that and MailerLite might be still sufficient for you. However, if you did want all the bells of whistles, many integration choices and lots of like advanced segmenting,

like when you think about email marketing and you think about, okay, what would my welcome sequence be or what would this be? If you get a lot of, oh, if this happens, then that happens. If you start thinking of a lot of scenarios in your head, or what if it was this type of subscriber or things like date based based on like wedding dates or birthdays of kids,

or you wanted to really get fancy with, you know, different categories or setting some goals. So pulling people out of automations, ActiveCampaign can do all of that. So I really think this is the go-to choice if you want to start having lots of different scenarios. And while you can begin on the light plan, I do find this limited,

so I would instead recommend going with Plus, but it is pricier. It starts at about $73 Australian a month for up to a thousand contacts. But for that you get fully flexible automations. You get the landing pages, you get easy management of your lists and tags, you get some e-commerce features, and it does have a whole separate CRM package in its sales packages.

So it's called the deals module. And if you don't have an existing CRM and you are interested in having something that builds a pipeline for you, like a sales pipeline with deal stages and it tracks your win loss ratios, you can even have a sales team put in or it can just be you, but have that all in one with your email marketing.

So as your lead or your customer moves through your pipeline, you can actually trigger off emails to go or reminders or notifications to yourself. And even you can track your phone calls and it can even put in all the emails back and forth emails you have with these clients. So in your Gmail, so it has nothing to do with ActiveCampaign,

it's from your Gmail or you can send it from ActiveCampaign if you want to have that all in one place, all in one dashboard, you can build this in to the marketing as well. And that starts from about 139 a month for both the marketing plus the sales. So I'm not sure if that makes a lot of sense, but basically it's one of those things that is hard to describe without actually seeing it in action.

It's got a lot of these capabilities and when we open your eyes to it and you go, oh, that's what it can do, I absolutely would it is just eye-opening and to open up initially, I'll be honest, it can be overwhelming. Sometimes you need someone to guide you through it, particularly if you aren't the most tech savvy person out there.

But if you do want full flexibility and you do want to automate a

lot of the things, I would recommend having good look at it. So that's why I'm hosting the Free Live ActiveCampaign Essentials Masterclass in a couple of weeks. So we'll be looking at the big picture of how it works and how to get the most out of it.

So what do all those features really do? What the pricing plans mean, how to set up your segments, lists, tags, and automation so you know what goes with what without needing to click through everything. We'll talk about how to create ultimate personalized experiences using automations, and we'll also look at those deals and how to simplify your sales process and whether you should consider adding this functionality.

So a replay will be available to registrants. So make sure to sign up at yaelkeon.com/activecampaign and I would love to show you through this software. Okay, but back to choosing the right one for you. Here's really the bottom line. Take what I've said here and just go with something or choose two and have a deeper look at it by signing up to the free plan or going to the free trial and having a go.

Or just watch some YouTube or support videos to see what you like. Then of course, make sure whatever you choose can integrate with your existing booking software or it will support any of that future growth ideas you have. But then decide having some email marketing setup is better than none and you can always change later. It is not over complicated to migrate to something else.

Okay, hopefully you found all of that helpful. Thank you so much for joining me today. I would love to hear from you about what you have enjoyed from this episode or what you want to know more about in future episodes. So please let me know over on Instagram, I'm at @yaelkeon and I'll see you in the next episode. Thank you for listening to Easy Email Marketing.

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