



The
Marketing
Dojo

Top Marketing Automation Tools

Hi, my name is

Marty Fisher

Founder of Sherpa Marketing
and Creator of The Marketing Dojo.

**I help marketing
leaders build world-class
marketing departments
that produce predictable,
measurable results.**

You can find productivity tools for just about anything these days which means you can approach your research a little bit differently.

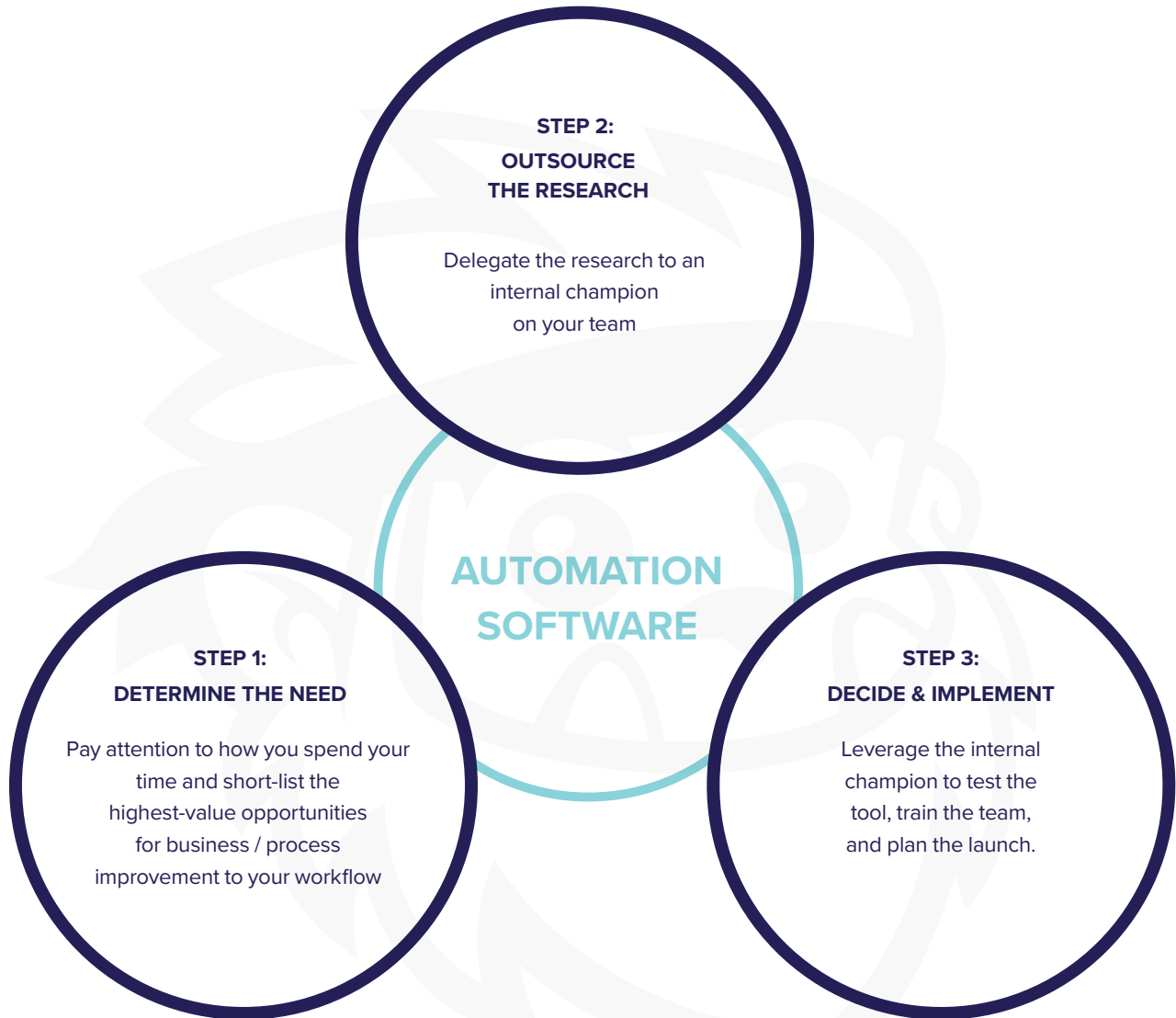
If you're looking for idea-starters, this list of [Marketing Automation Tools](#) will give you a good place to start.



Leveraging Automation

Leveraging automation helps you become more efficient, increase productivity and reduce the amount of errors. It streamlines work-flows and processes and removes the laborious manual alternative. It helps to maintain a consistency throughout your internal processes and your touch points with your clients and prospects.

Here's how to start leveraging automation for your business today.



Step 1: Determine the need

The first step is to do an audit of all the tasks you or someone in your organization currently does.

Look for the following tasks:

1. Repeated tasks (e.g. emails)
2. Paperwork (e.g. invoices)
3. Spending time finding things (files)
4. Things you wish you had time to do

To be more thorough, keep a running list in your notebook or on your computer and as the week goes on you'll start to notice what tasks are taking up your time.

Step 2: Outsource the research

In this step, Google is your friend. Nominate an internal champion to take your wish list of activities that are automatable and research the best options.

Do this by reviewing the tasks you want to automate and breaking it down further by understanding what the task is accomplishing. From there you can research tools that achieve the result you are looking for out of an automation tool.

Create an excel spreadsheet to help you evaluate tools that perform the same function. What features are necessary? Which ones are nice to have? Review the different levels of the product and compare to your business needs. Will a free basic version do the job, or do you require multiple licenses for multiple users?

Read the reviews from third parties, take the virtual tour, gather as much data possible to help you make an informed decision.

Other things to consider when creating a consideration list are:

- 1. Support:** You are buying a tech tool, so you want to make sure that the provider offers tutorials and other customer support options.
- 2. Limitations:** What limitations does the software have if any? Are there limitations on the number of users, accounts, contacts, how many emails can be sent in a month. This is where it's important to know what exactly you want the software to accomplish.
- 2. Pricing and Scalability**

Decide and Implement

Step 3: Decide and implement

When making your decision, review your spreadsheet and ask yourself, what exactly the automation tool is meant to accomplish. If you're looking to save time, but all the reviews say that it is clunky and hard to learn.... maybe look at an alternative.

Decide on an option. Most should come with a free trial.

Utilize the free trial by getting your internal champion to test out the software and get it as close to "ready" as possible before pushing it live.

Hold them accountable for training you and any other users of the tool and successfully onboarding your team.

Some of my favourite automation tools:

1. Email marketing

Mailchimp

Sendinblue

Constant Contact

2. CRM

Marketing Automation CRM

- Infusionsoft / Keap
- Activecampaign
- Marketo
- HubSpot

Sales CRM

- Pipedrive
- Insightly

General CRM

- Salesforce

3. Measurement/Reporting

SegMetrics.io

iTracker360 (specific to Infusionsoft)

Databox

4. Integration

Zapier

Automate.io

5. Chabot

Drift

HubSpot

6. Scheduling meetings

Appointlet

Calend.ly

Microsoft Bookings

7. Workflow

Automate.io

If you're a Marketing Leader and you'd like my help personally to build a world-class marketing department and crush your targets this quarter, [book a FREE Strategy Session](#) now.

My team or I will hop on a call and figure out the **#1 thing** you need to close the gap.

[BOOK A CALL](#)

sherpamarketing.ca/strategy-session



The
Marketing
Dojo