



CMO Dojo

Top Marketing Automation Tools

Hi, my name is **Marty Fisher**

Founder of Sherpa Marketing
and Creator of CMO Dojo.



I help CMOs and 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.

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

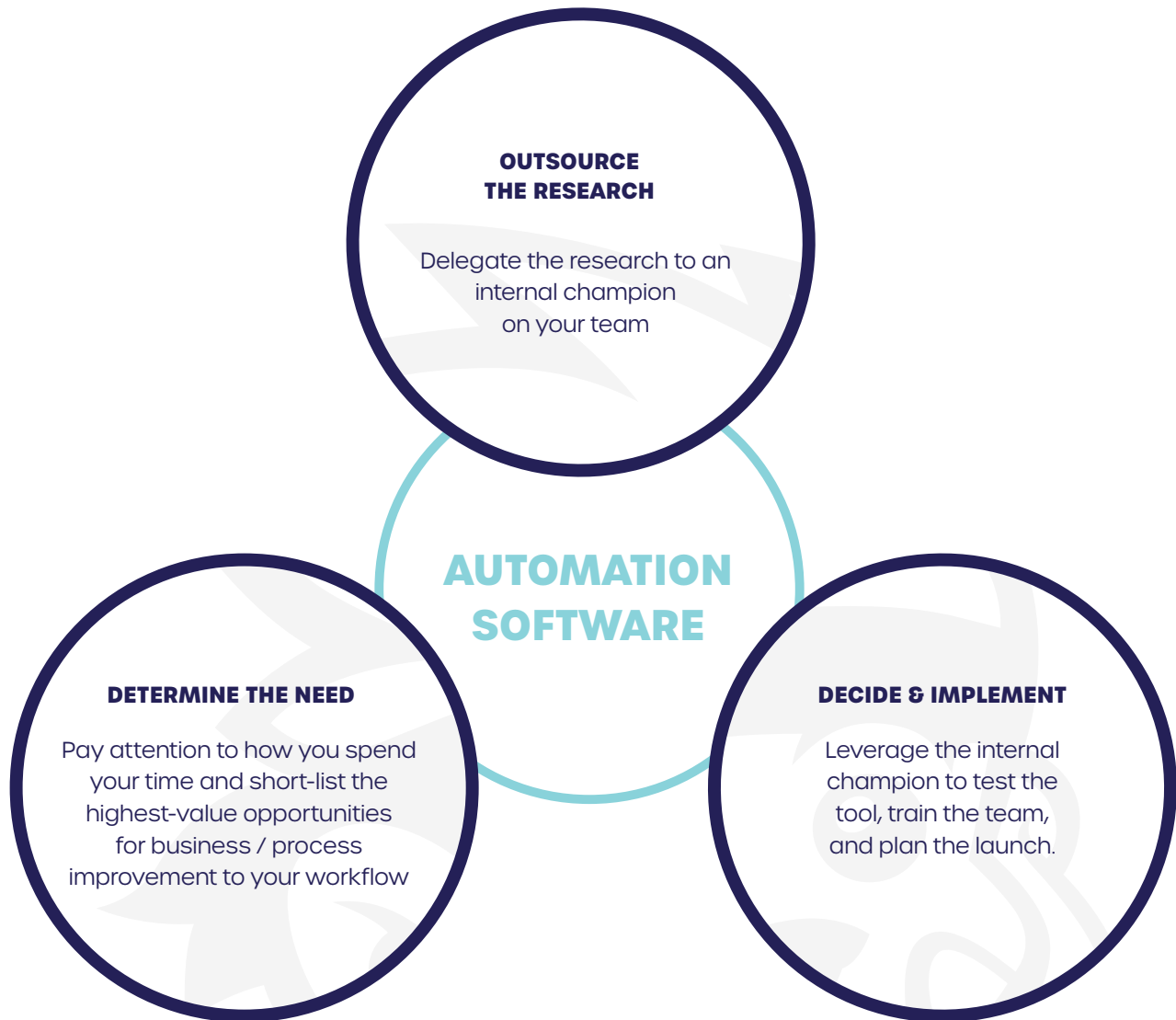
If you're a CMO or Marketing Director and you'd like my help personally to build a world-class marketing department and crush your targets this quarter, [book a FREE Strategy Session](#) now.

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





Step 1: Determine the need

Look for:

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

Step 2: outsource the research

Nominate an internal champion to take your wish list of activities that are automatable and research the best options.

Step 3: Decide and implement

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 in the tool and successfully onboarding your team.

Some of my favourite automation software:

1. Email marketing

- a. Mailchimp
- b. Sendinblue
- c. Activecampaign

2. CRM

- a. Marketing Automation CRM
 - Infusionsoft / Keap
 - Hubspot
 - Marketo
- b. Sales CRM
 - Pipedrive
 - Insightly
- c. General CRM
 - Salesforce

3. Measurement/Reporting

- a. SegMetrics.io
- b. iTracker360
(specific to Infusionsoft)

4. Integration

- a. Zapier

5. Chabot

- a. Drift

6. Scheduling meetings

- a. Appointlet
- b. Calend.ly

7. Workflow

- a. Automate.io



CMO Dojo