

A hand holding a white envelope over a desk with a potted plant and papers.

10 Questions You Must Answer Before Choosing Marketing Automation Software

Brought to you by

Drip

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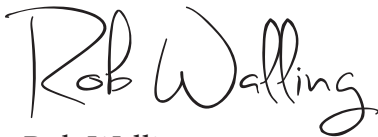
Introduction

Over the past few years, we've seen several players emerge in the marketing automation space. That's why, even if you already use an email marketing tool, you've probably wondered: "What email marketing software should I be using?"

We wrote this guide to help you answer that question with confidence. On the following pages, you will discover 8 key questions to consider when choosing marketing automation software. Some platforms are better for different situations, and there's no one-size-fits-all answer. These are what we've found to be the key questions to consider when comparing platforms.

Let these questions guide your decision, and hopefully you'll find a tool that not only grows your business, but delights customers with every message you send.

Warm regards,

A handwritten signature in black ink that reads "Rob Walling". The signature is written in a cursive, slightly slanted style.

Rob Walling
Co-founder, Drip

P.S. New to marketing automation?
Find out why it's the future of email marketing.
[\(Find out why\)](#)

The Questions

1. Are There Mandatory Training Fees?

Unfortunately, with many of the big marketing automation players, you have to speak to a salesperson in order to buy. No matter what. And several platforms also have mandatory training costs.

Be wary of hidden “set up” or “training” costs.

Ask your salesperson on the phone if there are mandatory training fees, or bring this up on Live Chat before moving forward. You’ll want to know the true upfront cost of getting started.

2. What Will Your Actual Monthly Cost Be? (Beware Of “Bait And Switch” Pricing.)

When you're looking at email marketing software, the actual monthly price can vary widely from tool to tool, once you include all the integrations and features you want to use.

For example, some providers like Infusionsoft and ActiveCampaign give you multiple pricing tiers, which look reasonable. However, when you want to integrate with common landing page software or your shopping cart provider, each integration can lift your monthly recurring price. These are sometimes called “add-on” or “integration” fees.

Before you sign up for marketing automation software, be sure to ask support how much you can expect to pay **after** integrating with your favorite tools.

3. Is The Email Provider “List-centric” Or “People-centric”?

This is big...

When it comes to email marketing, you have two camps:

1. List-centric. Your subscribers exist on different lists. If you send an email broadcast to multiple lists, subscribers receive duplicate emails and you are charged twice for the same subscriber. Most of the classic “email newsletter” tools are list-centric.

2. People-centric. You can apply tags to your subscribers, but each subscriber exists *only once in your account*. This lets you send the right message, to the right person, at the right time (not multiple times)—and reap the rewards of a targeted, relevant conversation.

People-centric tools give you the freedom to send triggered, targeted campaigns to leads based on web pages they've visited, products they've purchased, level of email interaction, actions they've taken and haven't taken, and much, much more.

These segmented, targeted emails almost always lead to higher open rates, click-thru-rates, and revenue.

The data doesn't lie:

- 88% of marketers who use personalization says it has a high impact on ROI and engagement. ([Econsultancy](#))
- 84% of marketers who use segmentation rate their email ROI as good or excellent ([Econsultancy](#))
- 77% of email ROI comes from segmented, targeted and triggered campaigns. ([DMA](#))

There's a reason that most classic list-based providers are trying to adapt and catch up to compete with the modern, people-centric tools.

Segmented campaigns are highly profitable. Choose a provider that's built for individual contacts with multiple tags—not "lists" with multiple contacts.

*“ We no longer have multiple “lists” of subscribers. Just a flat database of subscribers that could belong to *multiple campaigns* at once. ”*

**Adrian Rosebrock, PylmageSearch
Drip customer**

4. Can You See The Customer Journey Of Individual Contacts?

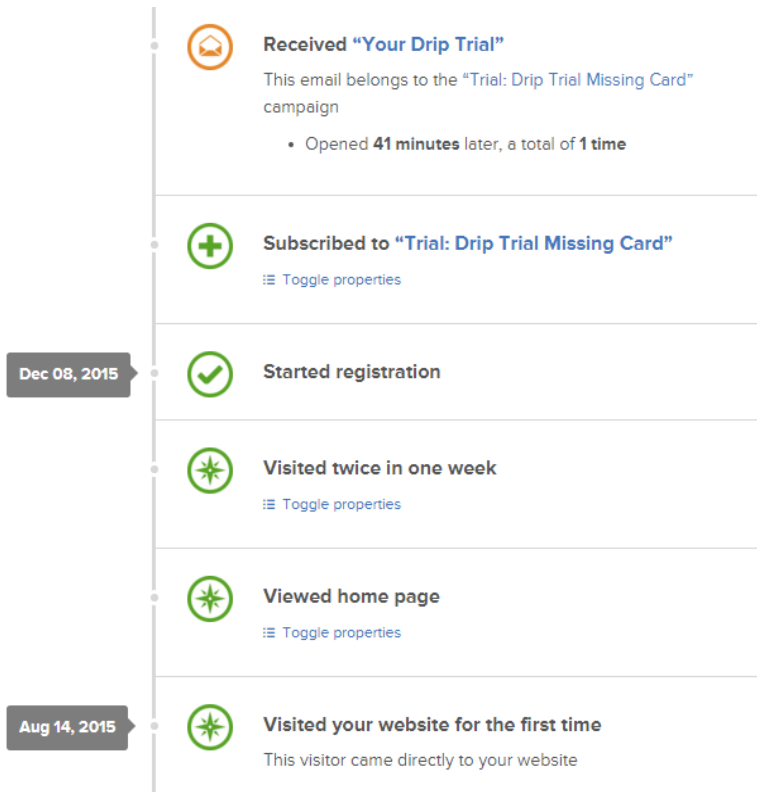
“ Half the money I spend on advertising is wasted; the trouble is I don't know which half. ”

John Wanamaker

There are a few marketing automation tools that allow you to effortlessly see the entire “journey” of your contacts. This gives you a more complete picture of your marketing, so you can pinpoint what’s working.

When you can see precisely which campaigns are converting, it’s like taking the red pill in *The Matrix*. Suddenly, you can see each contact with the ‘Customer’ tag, and pore over the exact journeys people take before becoming customers.

This view gives you an effortless channel to see which marketing campaigns are generating the most customers and revenue in your business. You’ll know which half of your advertising spend is working—and which half isn’t.



Customer Journey view in Drip, showing how one contact visited the home page, re-visited several times, then started a free trial before finally converting,

Make sure you can see the Customer Journey in your email provider for each contact. At the very least, you'll want easy reporting and ROI graphs for every campaign.

As Peter Drucker said, *"what gets measured gets managed."*

5. Can You Integrate With Tools You Already Use?



If you've ever tried to hack together different software tools, you know that the tech side of marketing automation can be a massive headache.

That's why, when you're choosing among email marketing platforms, it's a good idea to list out all the major tools you currently use in your business.

This way, you can quickly decide whether or not a particular email tool will “play nice” with your landing pages, shopping cart, CRM and more—and not just through Zapier. Zapier is good; but it's not what we consider a “first class” connection between two applications.

With Drip, you have direct, one-click integration with every one of your favorite tools. No hassle, no headaches, and no “integration” fees.

6. Will Moving From Your Current Email Provider Give You Nightmares?

Let me guess...

You've considered trying new email marketing software. But you already have subscribers and sequences you'll need to move over to the new system.

If that's the case, it can feel overwhelming to think about making a switch. However, it doesn't have to suck. Many platforms provide options to ease the pain of switching over.

At Drip, we give you 4 options, with different levels of ease.

Here are your options:

1. If you have a simple setup, you can just export a CSV of contacts from your current email provider and import into Drip. Done. You can copy and paste emails into sequences in Drip, which might take you an hour (or a few, depending on the complexity of your setup).
2. If your setup is more complex, we can schedule a short call to guide you through the process. We offer this call to new customers at no cost.
3. If you want us to migrate for you, we can do it for a small fee. Contact us for current rates (ranging from low- to high-hundreds of dollars, depending on complexity). Many of our customers are relieved to get this off their plate.
4. Finally, there are consultants who help companies with extremely complex setups move from their old email platforms and get set up on Drip, and typically charge between \$2,000 and \$3,000. Email us at support@getdrip.com for our latest recommendations on outside Drip consultants who offer this concierge service.

7. Is The Software Easy Or Awful To Use?

“ *Simplicity* ”

Josh Ledgard, KickoffLabs

“ *Simplicity at the basic level.* ”

John Sonmez, Get Up and Code

“ *Painless and even ‘fun’ to use, which is saying a lot for e-mail software!* ”

Chuck Anderson, 101 Languages

Drip users, in a survey about their experience with the software

At the end of the day, the point of marketing automation is to grow your business. You want to realize a return on your investment and see a lift in revenue and profit.

We believe that you'll make the most sales from your campaigns when your software is easy to learn and intuitive to use.

But how can you tell if the software is easy to use... if you've never used it?

Before you sign up for any platform, it's a good idea to find people who are already using the software, and get their advice.

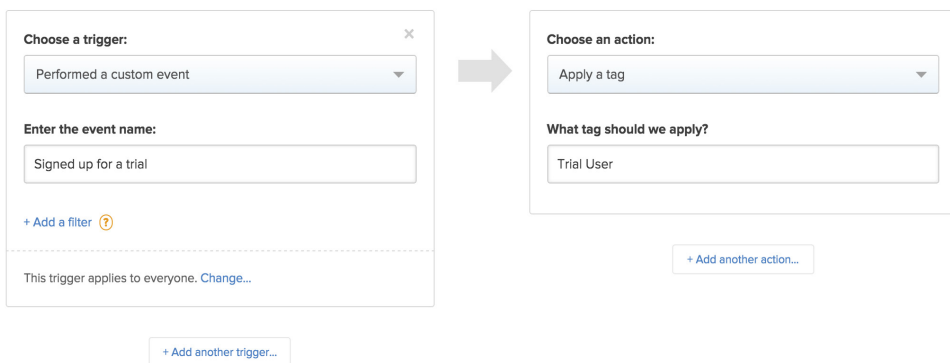
Is the platform simple? Do they need 1-on-1 support to set up campaigns? How long was the learning curve?

Let existing users inform your decision.

Below are a few Drip case studies, to help you decide:

- [How NinjaOutreach Achieved Nearly 1000% ROI and Rocked Black Friday Using Drip](#)
- [How Drip Helped A Single Founder Grow His WordPress Plugin Revenue by 5x](#)
- [How Ruben Gamez of Bidsketch Used Drip to Increase Trial Users by 30%](#)
- [How Adrian Rosebrock used Drip to Overfund His Kickstarter by \\$32,500](#)

8. Can You Set Up Automation Rules?



The image shows a two-step configuration process for an automation rule. On the left, a box titled "Choose a trigger:" contains a dropdown menu with "Performed a custom event" selected, a text input field with "Signed up for a trial", and a "+ Add a filter" button. Below this box is a "+ Add another trigger..." button. An arrow points to the right, where a box titled "Choose an action:" contains a dropdown menu with "Apply a tag" selected, a text input field with "Trial User", and a "+ Add another action..." button.

Automation rules are a fan favorite among marketing automation users. They are also very, very profitable—when implemented correctly.

Rules follow a simple if-then format, consisting of a “trigger” and an “action.” For example: **If a prospect buys via Paypal, then remove the tag ‘prospect’, remove them from the campaign ‘prospect marketing’, apply the tag ‘customer’ and subscribe them to the campaign ‘customer nurturing’.**

If you only create one rule, make sure you segment your prospects and your existing customers.

Why?

A few years ago, in a viral article called [15 Statistics That Should Change The Business World – But Haven't](#), Colin Shaw noted that *“it costs 6–7 times more to acquire a new customer than retain an existing one.”*

And yet, most companies don't segment their prospects and customers. They send the exact same sequences and newsletter to everyone, and they're leaving revenue on the table.

*“ The automation features are what really sold me. The fact that I could connect Gumroad/DPD to Drip and *automatically* tag and move subscribers around when they become customers was another *ah ha* moment for me. From there, my use of automations have exploded. ”*

**Adrian Rosebrock, PylmageSearch
Drip customer**

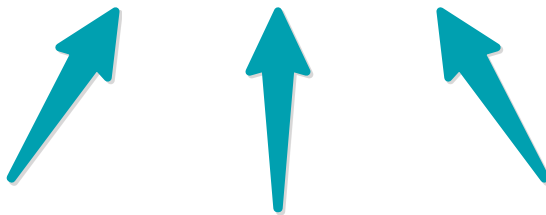
Don't miss out on the power of automation.

When you find a platform that lets you set up rules, start by segmenting your leads from your existing customers. As soon as someone purchases, your software can trigger a nurturing sequence that runs while you sleep.

A few ideas: nurture new customers with content to help them get the most from their purchase, increase your lifetime client value (LCV) by sending related offers and upsells, send evergreen surveys about your product, ask for testimonials, and create a referral engine. All of these messages can be automated with rules.

Pro Tip: at Drip, we give you [Rule Blueprints](#), to show you exactly how to set up the most popular and profitable rules. Look through rules collected from our users in software, consulting, online courses, and more.

(To see one of our secret, most profitable rules in action, [click here to visit our secret rule demo page.](#))



9. Can you create campaigns in a Visual Builder?

Creating automation rules is awesome.

Every point, every click...makes your life easier.

Until you've created 50 of them. Then comes the point where you ask yourself: "How does all of this tie together?"

Rules link to rules and on to other rules, but you can't visualize the relationship. Multiple rules firing from the same triggers...can wreak havoc on your brilliantly planned campaigns.

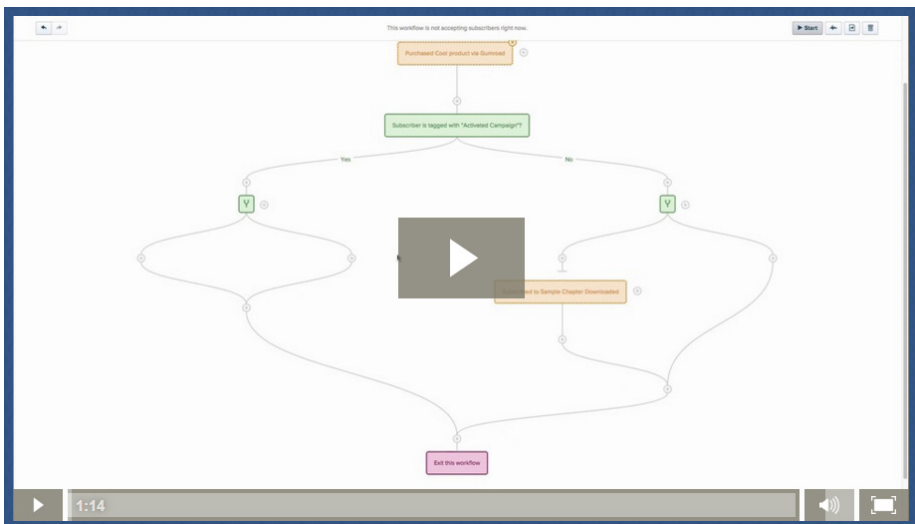
Individual automation rules are great for isolated tasks (and in Drip, Automation Rules aren't going anywhere). But when one rule feeds into the next, you need a way to see how they interact.

“As your marketing evolves and expands over time, you'll find that if you're not using a visual builder, you're doing it wrong.”

Visual campaign builders are next level automation. They solve the problem of not being able to visualize how rules chain together by showing you a visual display of email campaigns, delays, tags, and other actions. In essence, they make complicated things easier to build and maintain.

If you plan on weaving sequences and rules together, then make sure you choose an email marketing or email automation platform that has a visual builder.

To see Drip's visual builder in action, click below to watch this quick 1-minute video on *Workflows*:



10. Is the Visual Campaign Builder easy enough that you'll actually use it?

Visual builders are great. Visual builders that require a PhD...not so much.

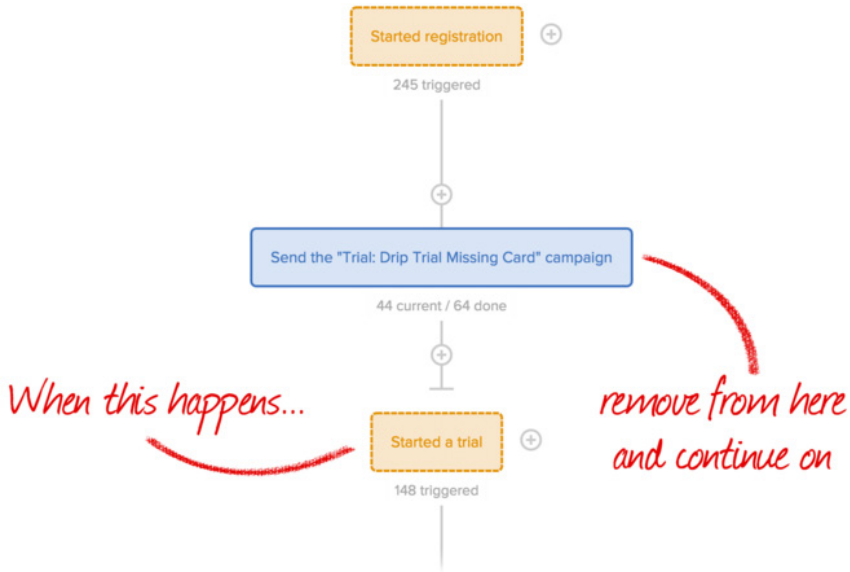
If you've tried using one, you may have found yourself saying: "I have no idea how to use this thing; it's not at all intuitive," or "This is really powerful, but it sure has a lot of little bugs."

If you feel overwhelmed by the complexity of a builder, run into bugs, or are told you need to pay thousands of dollars to learn how to use it, you've made a wrong turn.

There are only a handful of visual builders available, and the difference in power and usability is striking. Look for an interface that's intuitive to use.

You also want a visual builder that lets you create purchase "goals." If you've ever wanted to send emails just for customers (such as asking for testimonials, sending a post-purchase "check in", or cross-selling other offers), then you're going to want goals.

Goals jump a subscriber forward as soon as they take some desired action. This lets you move contacts to a separate campaign—or stop sending emails altogether—as soon as they purchase.



When a subscriber converts, you can stop sending marketing emails and start sending customer nurture emails—without you lifting a finger .

Believe it or not, in some visual builders, there's no easy way to configure goals. This forces you to manually add the rule: *"did they purchase yet? if not, continue to the next email; if they did purchase, stop this campaign"* after every single email you add. This makes for crowded, complex diagrams that get very confusing, very quickly.

With Drip, we made sure to create your visual builder with goals and an intuitive UI, so you can create virtually any funnel that you can diagram on a whiteboard—without the overwhelm and confusion.

Below are a few examples of production *Drip Workflows* built by Drip users Richard Patey and Brennan Dunn, showing the power of a visual builder:

- [Richard Patey: Visualizing Email Workflow - The New Drip](#)
- [Brennan Dunn: Using Drip's New Workflow Editor To Create A "At Your Own Pace" Email Course](#)

Bonus: we've also put together step-by-step guides for campaigns called [*Drip Workflows Blueprints*](#). These blueprints cut your learning curve dramatically with:

- [eBook Downloads](#)
- [Email Mini Courses](#)
- [SaaS Trial & Onboarding](#)
- and more...

Give these blueprints a shot, and watch how quickly you get the hang of *Workflows*. Within minutes, you'll be up to speed and building the advanced marketing funnels that will grow your business.

About Drip

Drip is lightweight marketing automation that doesn't suck. Have you heard of Eloqua, Marketo, Ontraport, or Infusionsoft? If so, think of Drip as a lightweight alternative that gives you the bulk of the value at 10% of the sticker price.

When you try Drip free for 21 days, you can reap the benefits of more sales and profit—without having to talk to a salesperson, sign an annual contract, pay for mandatory training, or hire an outside consultant just to learn the software.

Start your 21-day free trial today:

[See Plans and Pricing](#)

[Request A Demo of Drip](#)

“ We've seen 12x more leads since we started using Drip. It's a must-have for any company. ”

Jeff Epstein, Ambassador