



CHOOSING THE RIGHT EMAIL CRM FOR YOUR PRACTICE

As a marketing technologist serving the integrative, naturopathic and functional medicine provider community, I frequently have to weigh in on a provider's "tech stack".

In order to nurture your prospective patients to the point where they know, love and trust you enough to schedule a Discovery Call with you... you need a system to deliver a series of emails.

Most practitioners we work with, typically have one of the first generation email autoresponder solutions like Mailchimp, Constant Contact, iContact or Aweber.

To decide whether that solution is still the best bet in terms of features and pricing, consider this:

EMAIL CRM CAPABILITIES TO CONSIDER

#1 - Sending Emails

- Obviously at the core of an email CRM. The first generation systems like Mailchimp, Constant Contact, iContact and Aweber provide for a basic autoresponder, but don't allow for sophisticated automations where signing up for a specific email automation also unsubscribes people from another automation.
- For example, if you create a nurture email sequence designed to get prospects to sign up for a Discovery Call, you need automation to stop that email sequence as soon as a prospect has signed up for a Discovery Call. Makes sense? Second generation email CRMs like [ActiveCampaign](https://bigboost.marketing/activecampaign), GetResponse and Convertkit allow that.
- Our top recommendation for handling email-only:
<https://bigboost.marketing/activecampaign>

#2 - Collecting Payments

- Yes, you might collect payments in person, or through your EMR. But once you have online courses or anything where a purchase requires a fulfillment email sequence, then you should consider whether you need to upgrade your email CRM to also include payment processing capabilities.
- Many practitioners “frankenstein together” different systems like ActiveCampaign and a shopping cart like ThriveCart or SamCart... but that starts to add up, and the integrations are never 100% reliable. That's why we recommend [Ontraport](https://bigboost.marketing/ontraport) or Kartra... see more at <https://bigboost.marketing/ontraport>

#3 - Delivering Courses

- If you're going to offer courses, you could go with a standalone solution like Kajabi, Teachable or Thinkific.... but as with accepting payments through third-party providers, you now add a third system into the mix with overlapping capabilities.
- The better solution is to go with a platform like [Ontraport](https://bigboost.marketing/ontraport) or Kartra that combine all these capabilities into one cohesive platform.

- While Keap (formerly Infusionsoft) has the capability for online courses, you need an extra plugin like Memberium (with a monthly subscription payment) to add that capability... driving up the cost.

#4 - Tracking Affiliate Referrals

- Once you've enrolled affiliates to promote your offers, you need to track their leads and associated sales. Depending on what they are promoting (i.e. a course), your course software like Kajabi, Teachable or Thinkific have a basic affiliate tracking feature.... but only for people that buy through the affiliate link within the first 30 days.
- This means, you can't have affiliates promote a lead magnet that has a much higher optin conversion than a sales page for your course... so you're missing out on thousands of potential buyers.
- Systems like Keap (formerly Infusionsoft), Kartra or [Ontraport](#) handle this without problem.

NEED HELP TO DECIDE?

ActiveCampaign: <https://bigboost.marketing/activecampaign>

ConvertKit: <https://convertkit.com/>

GetResponse: <https://www.getresponse.com/>

Thinkific: <https://www.thinkific.com/>

Teachable: <https://teachable.com/>

Kajabi: <https://kajabi.com/>

Ontraport: <https://bigboost.marketing/ontraport>

Keap (Infusionsoft): <https://keap.com/>

Kartra: <https://home.kartra.com/home>

If you want our help to select the right technologies and softwares for your practice, [click here to schedule a free strategy session](#).

ADDITIONAL TRAINING OPPORTUNITIES



Do you want access to curated resources that will allow you to level up your practice marketing? Do you want a place where you can get your stickiest questions answered?

We take our mission seriously to help our community attract, nurture and convert more prospects into patients... and that's why we're continuously adding practical how-to tips and suggestions to our free FB group: <https://facebook.com/groups/predictablepatientflow/>



If you'd like to skip ahead and discover the **5-Step Strategy Our Clients Use To Attract 15+ New Patient Prospects Each Month** (Without Having To Become A Marketer or Tech Wizard):

<https://bigboost.marketing/ppf>



If you'd like to learn **How We Help Health Practitioners Be Seen As The Go-To Choice (And Fill Their Practice)**, join us for a special on-demand training : <https://bigboost.marketing/webinar>

MEET ULI ISERLOH

As a marketing technologist, Uli Iserloh has been advising entrepreneurs and organizations on marketing strategy and marketing technology for over 17 years – specializing in building automated marketing systems that position health practitioners as the go-to experts in their community.



After 10 years in the pharmaceutical industry, he founded Big Boost Marketing, an award-winning digital marketing agency serving many of today's Functional Medicine leaders. He also serves as the COO of the Evolution of Medicine, and regularly speaks on marketing automation and technology.

You can follow Uli on Instagram @ <https://instagram.com/uliiserloh>

Email: uli@bigboostmktg.com

Website: <https://bigboost.marketing>

Facebook: <https://facebook.com/groups/predictablepatientflow>

Youtube: <https://www.youtube.com/uliiserloh>

Pinterest: <https://www.pinterest.com/uliiserloh>

Phone: 908.864.7192

Big Boost Marketing

84 Washington St, Suite 2W

Hoboken, NJ 07030

To review your marketing approach and website, schedule your complimentary strategy session via <https://bigboost.marketing/apply>