

SKILL 10

TECHNOLOGY

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STAGE II: PLATFORM

MODULE D: TECHNOLOGY

SKILL 10: CRM TECHNOLOGY

One of the biggest obstacles to building an online practice is knowing what tools (hardware and software) to use. This section covers many of the tools you'll need to quickly and efficiently build an online practice. If you are technically challenged, it's still wise to have some understanding of the technology involved. You can then hire a professional to set up your funnel.



Technology can be overwhelming at first. There's a **learning curve** in developing any new skill. You are building a foundation for your business, which will serve you for many years to come.

Some coaches *become* techies while overcoming all of the challenges they face at this stage. Others hire tech support people. Technology is constantly changing and advancing. Know your specific goals is important at this step.

We are not affiliated with any of the tools mentioned in this training. Our sole purpose is to support you, in making the best decisions for yourself.

The era two types of software you will choose from:

1. **TRADITIONAL CRM SOFTWARE:** CRM (Customer Relationship Management) Software may require that you get Technical Support. For this reason, it is **FASTER**, but it can also be **MORE EXPENSIVE** to use.
2. **DO-IT-YOURSELF SOFTWARE** is popular with coaches and entrepreneurs under 45. Do It Yourself. Technology is **LESS EXPENSIVE**, but it takes **MORE TIME**, because you have to Do It Yourself.

WE will look at CRM Technology first and make our recommendations, based on the research we have done. At the end of this section, we will look at Do-It-Yourself Technology. This can be a challenge, but it is well worth doing!

SYSTEMS MANAGEMENT SOFTWARE

I want you to be informed so you can make the best choices for your business. There are three types of Business Management Software:

1. Content Management Systems (CMS)

A **CMS** is designed to help users create, edit, and manage content on a website without needing specialized technical knowledge. Popular CMS platforms include WordPress, Joomla, and Drupal.

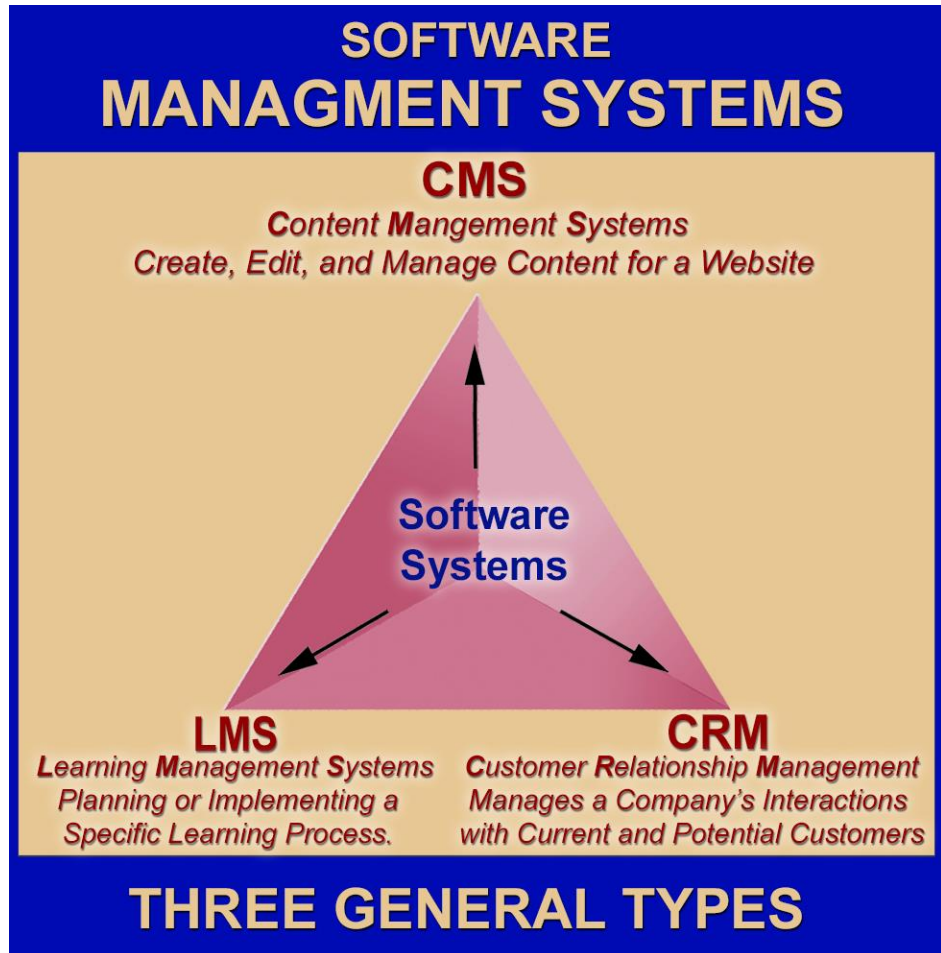
2. Learning Management Systems (LMS)

An **LMS** is a software application or web-based technology used to plan, implement, and assess a specific learning process. These are often used in educational settings. Examples of LMS include Moodle, Blackboard, and Canvas.

3. Customer Relationship Management (CRM)

A **CRM** system helps manage a company's interactions with current and potential customers. It uses data analysis about customers' history with a company to improve business relationships, specifically focusing on customer retention and ultimately driving sales growth. The focus is on your customer's journey.

There are many ways to build your online presence. A robust **CRM** will integrate the best features of a good **CMS** and a good **LMS**. This is what we recommend.



CMR (CUSTOMER RELATIONSHIP MANAGEMENT) SOFTWARE

Everyone has a *Contacts* app on their phone. Contact apps let you store and organize contact information (phone numbers, email addresses, etc.) for everyone you know. Your business contacts require more information. You may need to track the products people are interested in, what services they've purchased from you and much more.

CRM's (Customer Relationship Management apps) do this. Customer Relationship Management software organizes your contact information and manages your relationships with current and prospective clients.

A **CRM** is your own internal network or *operating system* that helps you manage and facilitate every transaction that takes place within your funnel. A robust CRM that performs each of the seven tasks below may be more costly, but more efficient.

Here, we'll give you an overview of the current technologies that meet the specific needs of health professionals, coaches, activists, entrepreneurs, artists, and visionaries. These technologies are constantly changing and improving. You may need to talk with a technology specialist, who can come up with the best **CRM** plan for you. Here are seven areas that your CRM software should integrate:

- 1. AN EMAIL SYSTEM**
- 2. A LANDING PAGE-BUILDER**
- 3. AFFILIATE TRACKING SOFTWARE**
- 4. A PRODUCT DELIVERY MECHANISM**
- 5. A SHOPPING CART / MONEY TRANSACTOR**
- 6. A CUSTOMER COMMUNICATION INTERFACE**
- 7. AN INTEGRATED CRM SYSTEM**

1. EMAIL LIST MANAGEMENT

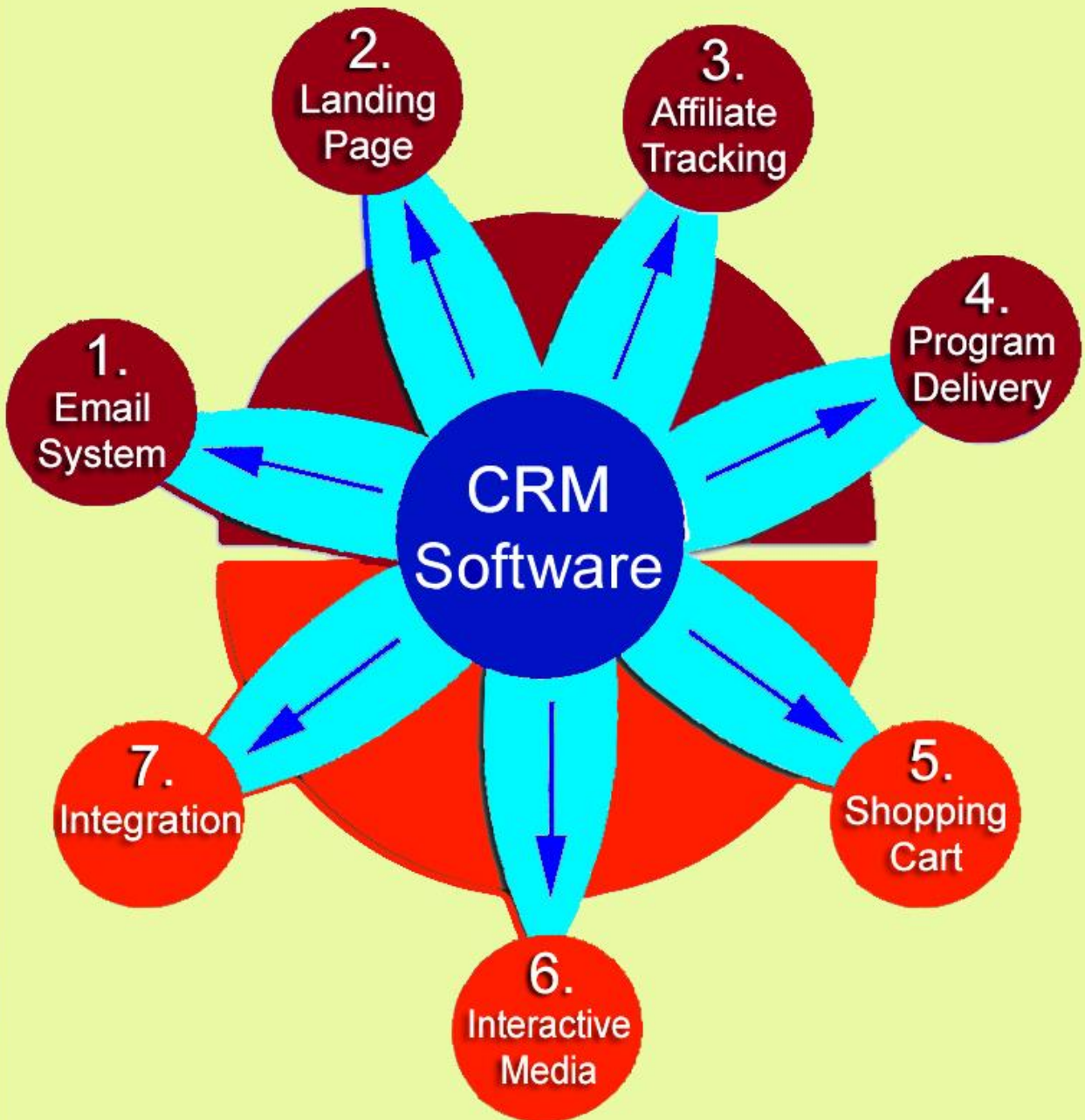
You may have heard that “money is in your list” or “your list is your retirement”. If you want to build an online business, the first and most important thing you need to build is your mailing list (Skill 16).

When it comes to building your list, you want to build it on a reliable, user-friendly platform. You also want to make sure that your platform offers some more advanced automation capabilities as your business grows.

Your email delivery system needs to be flexible and integrated with the other software that you will use to build your funnel. Other factors include:

- **AUTOMATION:** The level of automation that you want.
- **COMPLEXITY:** The complexity of the funnel or funnels that you have.
- **COST:** The investment you're willing to make.

CRM FUNNEL SOFTWARE



SEVEN COMPONENTS

Different companies offer different services. Decide what your end goal is *before* you commit to a specific email service! Email Services like **CONSTANT CONTACT**, **I-CONTACT**, **ACTIVE CAMPAIGN**, **AWEBER** and **MAIL CHIMP** are adding more and more services to their email systems, which allows you to build and segregate your list.

Why do you need to segregate your list? You may have some brand-new customers, while other customers have already bought products and services from you. In order to keep track of who has bought product “A”, you need to be able to *tag* them, so that you're not selling them the very same product they've already bought. If you don't segregate your customers in this way, it doesn't leave a very good taste in their customer experience.

You might also want to send your email list a newsletter, blog, or special news item occasionally. You may choose to do this to your whole list or just to a part of your list. *Tagging* allows you to identify the behavior and the needs of your customer, within the software technology you use.

Someone joins your mailing list for a free gift, and through one of the emails you send to them, they decided to sign up for a webinar. With basic email marketing tools, the subscriber starts receiving two sets of emails, one for the regular list they signed up for and one for webinar reminders.

With advanced programs, you can easily move the subscriber to the webinar list so they continue receiving the webinar reminder emails, and after attending the webinar, they will automatically be moved to another marketing campaign that suits them, based on their action on the webinar.

These advanced online marketing functions may not be your priority as you are starting out, but if you start with a wrong tool, you won't be able to expand your business when you need to, due to the limitation of your tools.

Consider using **MAIL CHIMP**, **AWEBER**, or **ACTIVE CAMPAIGN** to start out with. There are more complex systems, which offer email services within their larger platform. **KEAP**, **CLICK FUNNEL ONTRAPORT**, and **KAJABI** integrate email management with other CRM functions.

You will need to decide now if you want one robust and comprehensive CRM program that does everything or if you want to ‘mix and match’. All-in-one programs can be expensive, while mixing and matching may be more work.

Your customer is embarking on a journey with you. Understanding this allows you to create a good customer experience (journey). Your emails help them to choose the step that is best aligned with their particular journey.

2. PAGE BUILDING TECHNOLOGY

Once you have identified your **CUSTOMER EMAIL SYSTEM**, you can consider what software you want to build your Landing Page (or Sales Page or Opt-In Page). The following programs are often used for building Sales pages:

1. LEADPAGES: Lead Pages is fairly easy to use, it's inexpensive and Lead Pages offers many templates. Lead Pages also plugs into WordPress. The page builder editor in Lead Pages isn't as powerful as the one in Click Funnels though, and the pages aren't shown in a funnel format. Lead Pages offers suggested content guidelines, which can help you follow what an online marketer has done and simply change the words to match your work, creating the content of your page fairly quickly. But you won't have as much flexibility as Click Funnels provides you.

2. CLICKFUNNELS: Lead Pages requires some technical knowledge, so if you're new to technology, Click Funnels is a "drag and drop" technology with many templates to create professional landing pages, opt-in pages and sales pages. Click Funnels allows you to actually design your funnel. With other tools, you can design pages separately, but you don't see them all under one funnel, which makes it harder to track and get all the data simultaneously. Click Funnels is also a very powerful page builder. You can quickly create any page you like, the way you like it. Within a few minutes, you can get your landing pages up and running.

3. OPTIMIZE PRESS is a WordPress theme designed for building membership pages. A self-hosted WordPress site with an Optimize Press theme is a great way to design landing pages. Use Digital Access Pass as the shopping cart, affiliate tracking tool and membership management tool. You can integrate WishList and S2member for building membership areas. You can't directly check your Landing Page conversion rate with this program, so you'll need to invest in analytic tools such as VWO or Hot Jar.

4. INSTAPAGE is a landing page software that includes A/B testing, lead capture forms, editable templates, and easy integration with Mailchimp, Salesforce and others. Setup is simple. Instapage allows you to add shapes, images, videos, and buttons, so you can create any type of webpage you need. Instapage also has a built-in analytics tool so it's easy to analyze page performance.

5. KEAP is a comprehensive tool that can be used for Page Building. However, it is not always easy to build pages with Keap. One coach I know used ClickFunnels is a more user-friendly page building technology than Keap.

KAJABI is also an all-in-one CRM programs that include page building technology.

3. AFFILIATE TRACKING

If you choose to work with Joint Venture Partners or Affiliates, Affiliate Tracking Systems are important to have. If you partner with an affiliate, you need to have a way of tracking the business that they send to you, so you can pay them accordingly. Affiliate Tracking Software does this.

Some of the more robust systems used such as **KAJABI**, **CLICKFUNNELS**, **ONTRAPORT**, and **Keap** offer this feature already built in. These systems are often used by coaches, therapists, and health practitioners. But there are many combinations to choose from.

If you aren't going to use a more robust and inclusive model (such as the systems mentioned above), then you can add the affiliate program plug in **LEADDYNO**. Go to <https://www.leaddyno.com/>.

4. A PRODUCT DELIVERY MECHANISM

If you are delivering courses or programs, you will need a platform that can deliver your programs well, such as **THINK-IFIC**, **LEARN DASH**, **LIFTER LMS**, **MEMBERIUM**, **MOODLE** or **CUSTOMER HUB**. **WPME** and **KAJABI** are two integrated systems that feature product delivery.

THINKIFIC is a fast and efficient tool for creating and selling online courses. You can use Think-tific free of charge to build your course and put your membership platform together. When you are ready to sell your training, you can choose the plan that suits you the most.

KEAP is a comprehensive automation tool that can be integrated with many other tools. It is not a delivery platform, however. Delivery is the one function it doesn't have. When you want to deliver a product with Keap, you are limited to what Keap can integrate with its system. The best option is Memberium.

MEMBERIUM is the only membership platform that easily integrates with Keap. This is a recommended Program Delivery Platform if you are using Keap.

MOODLE is an open source and free platform. Here, you will need to be more tech savvy. Different platforms will have different visual styles, different abilities, and different ways of delivering products.

DIGITAL ACCESS PASS (DAP) is a Membership platform that can work with or without WordPress. Most people use **DAP** with their WordPress site. If you want to set your tool fairly quickly, get the MSIAB license of Digital Access Pass. Here, their team works with you one on one to help set up your site more efficiently.

5. SHOPPING CART

Most of the bigger, robust systems (including **KAJABI**, **ONTRAPORT**, and **KEAP**) have a built-in shopping cart or they have options to integrate with separate shopping carts. If you are going to be delivering products, it's important that you have a working tagging system that can identify purchases and deliver your products and courses automatically. That is what we mean by *integrated*.

There are many shopping carts to choose from on the internet. If you want to link a shopping cart to your website without integrating it to a bigger system, you can use: **STRIPE**, **PAYPAL**, **WOO COMMERCE** (a free gateway program) or **I-SHOPPING CART** (www.iShoppingCart.com) and others. Foreign Shopping Cart programs include **PAPAYA**, **VERTO**, **REMOTE**, and **DEEL**.

Decide how much you want automated and how important each element is to you. Choose the shopping cart that comes with your system if it is easily integrated. If you have specific needs, you can get a programmer to integrate systems. For instance, if you want to integrate different currencies from other countries, you can use Stripe, but this would have to be programmed.

6. CUSTOMER COMMUNICATION

How do you like to communicate with people? Do you prefer audio, video, or email? This will help you determine how you need to integrate your platform.

ZOOM: If you like working with video and audio together, Zoom is the best interactive program available. All you need is a computer and a link to the particular platform you are using. You can be the host and others can participate freely. You can record video calls on Zoom. Zoom is a good platform for producing your own videos and webinars. Because of the shared screen option, you can do Power Point presentations and perform demonstrations for people. Zoom is a downloadable app and it's free.

UBERCONFERENCE: If you prefer working primarily with audio, UberConference can work from your computer or from your telephone. UberConference is a free service that works well when more privacy is needed (for instance, teleconferences in which confidentiality is important). There is no video option. One can record conference calls. All you need to do is download the app, from zoom.com or from uberconference.com.

TELECONFERENCE.COM is primarily a telephone-based conference system. Teleseminar.com is a free platform. It was much more popular before the two above platforms came into existence.

7.. AN INTEGRATED CRM SYSTEM

Make sure that the CRM technology you use *integrates* with other technologies you want to work with. Technology alone is never the problem. The *integration* between the different technologies is critical. **Here are our ten top CRM choices:**

1. **CLICKFUNNEL:** The emphasis here is on creating multiple funnels. The internal email sequence works but it's slow and it's limited. It needs to be combined with a CRM that provides more extensive services.
2. **HONEYBOOK** is good for managing appointments and individual clients It provides invoicing and payment processing, proposal and contract creation, professional templates, and basic reporting. Its online payment software allows you to accept payments via credit cards, debit cards, and direct deposit once a project has wrapped. The HoneyBook Starter Plan is \$19 per month. Individual clients only.
3. **HUBSPOT** is a CRM that manages your contacts, your sales pipeline, your business growth, and your digital marketing, while nurturing leads. HubSpot CRM is easy to set up and use. It was created for small and mid-sized businesses. Its tools are designed to accommodate small teams with limited resources. No shopping cart. HubSpot's CRM is 100% free, with no expiration date. Advanced CRM features are available in premium editions for \$90 and \$159. More users and prices rise dramatically. Second only to SalesForce in popularity. Good customer support.
4. **KAJABI** is a popular technology that integrates the above platforms seamlessly. You can build landing pages, deliver programs, track affiliates and manage email with Kajabi. It's \$119 for less than 1,000 users. This program appears to be very popular among many coaches.

It's useful to understand Kujabi's business model. The site uses Artificial Intelligence. There is no sales team. If you ask questions, it's difficult to get specific information. Instead, you are encouraged to sign up for a trial subscription, which we did. We found that every function of Kujabi is a miniature sales funnel. If you want to build a website or sales page, for instance, there are templates, but most of them will cost you money. Many of the coaches who recommend Kujabi are affiliates, meaning that they are getting a percentage of anything you purchase. Buyer beware.

5. **KEAP (Formally INFUSION SOFT):** With Keap, you are investing in a comprehensive tool. But many people who get Keap pay for it for a year or two and end up not using it at all. If you are planning to use such tools, make sure to get the initial coaching package that the company offers.

Many people get Keap Software to manage their email marketing, landing page design, affiliate tracking and shopping cart in one place. The downside is the

high initial investment and steep learning curve to get Keap up and running. Hence the nickname, “*Confusion Soft*”.

6. **MONDAY SALES:** Basic is \$190, Standard is \$240, and Pro is \$380 per month. Prices is tiered, per-user pricing. Adding users incurs additional costs. There are some missing features. The company is based in Tel Aviv, Israel.
7. **ONTRAPORT** is the CRM Software program that I use. My tech support person likes the fact that you can get a 15-minute Zoom consultation at any time you need one. You can get also answers to your questions on their live chat. Every function on our list is included, although you may need to integrate your program for product delivery. Not too complicated. Good for starting out. Warning: The cost increases to \$200 when you have 200 users or more.
8. **PIPEDRIVE** is a sales pipeline CRM designed to help small businesses manage leads, track sales and close deals. Pipedrive helps teams streamline and consolidate sales data in one unified CRM sales tool. Pipedrive was designed for sales teams. The Advanced package is \$29 per user; the Professional package is \$49 per user, and the Enterprise package is \$79 per user. Warning: Two users (you and your tech support) and these prices double. Three users and prices triple, etc. Prices quickly rise with extra features.
9. **SALESFORCE** is a highly customizable platform. With Salesforce, you can tailor your CRM to meet your specific needs, requirements, and shared data integrations. Many features are sold separately, so it can get expensive. Salesforce is a robust and easy-to-use platform thanks to a powerful, fast, and easy- user interface. Salesforce is the Number #1 best-selling CRM Software today. It is often used by larger companies.
10. **ZOHO** is a cloud-based software that offers flexible pricing to businesses of all sizes. Zoho's CRM platform is enjoyed by small businesses because of its flexible price structure and capabilities. Along with email marketing, social CRM, marketing automation, and sales capabilities, Zoho provides customers with essential CRM tools. Known for their low prices, the Standard Plan is \$14, the Professional Plan is \$23, the Enterprise Plan is \$40, and the Ultimate Plan is \$52. You must take the free trial membership to learn more.

OUR RECOMMENDATIONS:

1. **COMBINE** three or more minor programs, such as MailChimp for email, Zoom for program delivery, and Stripe for Shopping Cart and forego a CRM for now,
2. **KAJABI** is a very popular do-it-yourself CRM program used by coaches and entrepreneurs. We have seen a lot of successful coaches use this. .
3. **ONTRAPOT:** If you are using a tech support person, **ONTRAPORT** is a robust CRM Program that offers comprehensive support to tech people.

DO IT YOURSELF TECHNOLOGY



FREE GOOGLE PROGRAMS

You can build a virtual office inside your computer using these Google programs. Google Drive, Google Classroom, Gmail, Google Forms, and Google Voice. These are excellent tools and they are all free!



iPhone APPS

There are many free or inexpensive apps that allow you to build your Web Presence from your iPhone: Telegram and What's App (phone and messaging); Boards (Video Sharing); Canva (Graphic Design); PhotoShop Lightroom (Photo Editing); Typeform (Online forms and surveys); Kajabi (Do-It-Yourself CRM); Bill Pay and Slack (Shopping Carts). These will be reviewed in greater detail in the live class.

PUTTING IT TOGETHER

You will put all of this together during Skill 12. You will come up with your Technology Plan. You will also put together your Support Team (Including Tech Support) during Skill 11. You may not have everything that you need to *implement* your Tech Plan now. But get started now by identifying what you want and need. There will be plenty of course corrections along the way.



**This is where a lot
of people get stopped.**



**MAKE YOUR
TECHNOLOGY PLAN NOW!**