

5 IMPORTANT TIPS

BEFORE YOU SIGN UP TO YOUR NEXT ONLINE SERVICE

Before you sign up to the new flashy awesome product that seems to be the absolute perfect match for you, it pays to do a little bit of due diligence. Doing some research will make sure that it is in fact the best product for your goals, and that there are no hidden charges. Or a fee service structure that forces you to upgrade for one small feature.

To help with the analysis of a new product, ask yourself the following questions and then work through the checklist to ensure you have everything covered before you hand over your hard earned cash.

1

Do you need the new product, or will an existing service or product you already have be adequate?

This may seem like a silly question but it can save you big time. Let's take for example landing pages. A landing page is essentially a single website page. You can create one on any website platform. You don't need to sign up to a landing page specific service just to create a landing page. If you have analytics installed on your website you can track the activity on your landing page. If you are after pre-made pages where you want to simply replace text and images, you can get landing page templates to load straight into your Wordpress theme. If you can set this up with minimal effort, you may save yourself \$30-\$100 per month depending on the service. If however, you struggle a bit with setting up pages by yourself and you just want to use a nice slick platform, then the online services are fantastic. The \$30-\$100 per month may be well worth it.

2

Work out your requirements of the product before you start.

This can also be a bit difficult if you are learning about what options are available as you start playing with new products. It's important though, to nail down your core requirements. The trick with this is understanding your current usage and possible future usage. This can have a large impact on the price you pay. For example let's look at a CRM (Customer Relationship Manager) tool. Most of these online tools cost structure is based on the number of contacts you have. If the product you are selling is a high cost product then you may only expect to have 200-300 or maybe even 1,000 customers (contacts) - this means that the CRM you purchase could probably get good value on a low contact plan. If however, you are selling a low cost digital product where you have 1,000's or possibly 10,000's of customers, then the CRM cost structure may be very cost prohibitive if it charges by the contact.



3

Integration, Integration, Integration.

I cannot emphasise enough the importance of integration. Integration is the ability for the online service to be set up to automatically connect to other online services to share data. For example, if you have a blog that people subscribe to, and you want that list of subscribers available to your email automation service then the blog service and email automation service must be able to be integrated. Often services will provide plugins, or something called an API (Application Programming Interface). This enables the software to talk to other software and share data. There are other online tools like Zapier that will then connect the different software's together. It's absolutely essential to understand about automation particularly if you intend to scale. You need to automate as much as possible as you will be unable to manually process or move data as your business grows.

4

Plan your free trial wisely.

Most platforms and online tools will have a free trial where you can utilise the product to understand whether it is right for you and your business. As these trials are time sensitive, it's important to allocate some time over the trial period to ensure you get the most value and to test the important features. One very important thing to remember when using your free trial is to understand exactly which features you are trialling. Some will be included in the base service offering, but it's very common for some trial features to be available only in the premium packages. It can be very frustrating to use a tool for a month, only to find out that the one feature you love and have begun using and relying on during the trial, is only available on the most expensive subscription.

5

Don't forget about your trials

Often when we are investigating new software we will try multiple services or products at the same time. As you start working with them you'll find the one that works better, or integrates better or the one you just prefer using. And so you focus on that one. It's during this time of high focus on ensuring the product is the best fit for your business that it's easy to forget the trials you have decided not to proceed with. If you haven't provided your credit card, then great, no problem. However, if it was a trial that you signed up to, for example, \$1 for the first month then full price for the second, then there is a high probability that you could forget and end up paying for that second month when you don't want to. Ensure you record and set yourself reminders so you don't forget the ones that could cost you.



DIGITAL CHECKLIST

FOR NEW ONLINE TOOLS AND SERVICES

■ 1. CHECK

Check whether the new online product is actually required. Can it be achieved with existing products?

■ 2. COMPARE

Compile a list of alternatives to compare.

■ 3. SEARCH REVIEWS

Search for online reviews on each product.

■ 4. SEARCH FORUMS

Search in forums where the products may be discussed to get third party feedback.

■ 5. FEATURES VS. PRICING

Break down the features on each alternative so you have a clear understanding of what is included at each price point.

■ 6. ELIMINATE

Ensure that each product meets your minimum requirements and disqualify those that do not.

■ 7. INTEGRATION

Ensure that the integration components of the product will work with your current systems. If they don't, do some additional research to see if they can be integrated with limited effort.

■ 8. TEST

Create a testing plan to ensure you test what you need to during the trial period.

■ 9. TRIAL

Trial each software/service making sure to record start and end dates of trials and any notes related to the product.

■ 10. RECORD

Record essential features that are available in the trial but are only available in premium versions.

■ 11. DECIDE

Complete testing and choose which product to use.

■ 12. CANCEL TRIALS

Ensure that you cancel any trials you no longer require and double check that you have not been billed for them.