



Introverted Visionaries Automate Tech Stuff – Customer Relationship Management (CRM) Checklist



To hire tech person to help with software setup:

Option #1: Ask the CRM you sign up for - for tech people trained in the software (see if they have a list of those certified in the software or can direct you to where to look)

Option #2: <https://join.upwork.com/mQJuPHt>

(that's our affiliate link if you wish to give us credit for referring you)

This list is updated as of May 2026

1. **Technical stuff**

☐ **CRM/Email Marketing/Merchant account integration (choose 1):**

Purpose: To have a software that sends emails in automated way to patient prospects & existing patients to inspire new patients to book, increase retention, referrals

NOTE: All Options #1-3 offer free migration from another CRM software & landing page creation feature

Feel free to use the links below if you'd like to give us credit for referring you

Option #1: MailerLite

https://www.mailerlite.com/?linkId=lp_170762&sourceId=wup&tenantId=mailerlite

Best overall for simplicity, affordability & most practitioners starting or growing to multi-6 figures





Income On Autopilot

Accelerator Mentorship

- o Free plan: Up to 500 subscribers, 12,000 emails/mo
- o Paid plans: Starting around \$10/mo for 500 contacts
- o Advanced plan: Starting around \$20/mo depending on list size
- o Unlimited emails on paid plans
- o Includes email marketing, automations, landing pages, forms, popups & simple websites
- o Pros: Very easy to use; affordable; clean interface; excellent beginner/intermediate option; strong email deliverability; visual automation builder; easier to maintain than Keap or Active Campaign; landing pages & forms included; good balance of simplicity + capability
- o Cons: More focused on email marketing & automations than advanced sales pipeline or team management; less ideal for larger clinics wanting all business operations inside one software; fewer advanced automations than Active Campaign; landing page customization more basic than dedicated page builders

Option #2: Keap (previously InfusionSoft)

Best for established practices wanting robust automation + CRM in one place

We use this ourselves & it's robust

Trial: <https://freetrial.infusionsoft.com/signup>

Call Jeremy Weber (602) 445-6216 to get the discount below:

Jeremy.weber@keap.com

****50% off x 4 mo + Coaching (1-time); \$99 for 5 sessions (normally is \$499)**

- o Basic Plan: Starting at \$99/mo for up to 500 contacts, unlimited emails up to 15 hours of free migration services from another CRM
- o Pros: Lots of features in one place (CRM, email marketing, e-commerce); plenty of room for growth; visual view of campaign is easy to follow, flexible

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Income on Autopilot Accelerator – VIP #2: Cash Machine Foundation – Tech Stuff
The Tech Stuff Checklist





email formats & campaigns; excellent list segmentation capabilities; great support & training; strong integration options, sms capabilities

- o Cons: Learning curve; higher start-up costs, simple landing page designs-not as good functionality to edit color & font from template (this is typical of CRMs that are more all-in-one that include landing page design feature)

Option #3: Kit (previously ConvertKit)

<https://app.convertkit.com/users/signup?plan=free-limited&lmref=DWL7ug>

- o Free for up to 1000 subscribers (but no automated email sequences, visual automation builders, third party integrations at free level)
- o \$10-25/mo for up to 300 subscribers; \$50/mo for up to 1000 contacts unlimited emails (full features including free migration from another CRM)
- o Pros: Easy to start using. Excellent deliverability, creator-friendly, simple interface, strong automations. Has CRM, email marketing, landing pages, has a nice visual builder
- o Cons: More expensive than MailerLite as list grows, simple landing page designs-not as good functionality to edit color & font from template (this is typical of CRMs that are more all-in-one that include landing page design feature); there are areas that don't autosave

Other reputable CRM options:

Ontraport, Active Campaign, Go High Level (latter liked by marketing agencies but not as user friendly)

Kartra, Simplero, or Kajabi (latter 3 can also host automated online courses all in one)





THE TECH STUFF

WHAT YOU NEED TO AUTOMATE CAPTURING & NURTURING LEADS



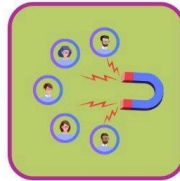
Traffic



Landing
Page



Decide to
Opt-In



Collect
Leads



Email
Leads

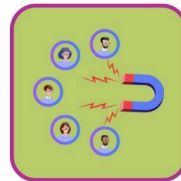
WHAT YOU NEED



Landing
Page



Connects &
Communicates



CRM
(Customer Relationship
Management)

CRM=
collector of leads
+
email automation system
+
(ideally payment
integration)

