

# CRM Integrated Email & Marketing Automation Platform Product Comparison

Feature	IntelliClick/ GoldMine	Automation Platforms	Note
<b>LIST MANAGEMENT</b>			
Flag contacts to multiple target lists (groups)	✓	✓	
Prepare and use list directly within GoldMine	✓	✗	Requires export of data and upload to Constant Contact to create list
Option to validate lists for deliverable email addresses	✓	✗	
List integrity management - flag and clean up malformed and/or non-deliverable email addresses within GoldMine database	✓	✗	
Track undeliverable addresses & hard bounce	✓	⚠	Only tracked on automation platform; requires download and manual update to GoldMine
Automatically flag GoldMine data fields for list segmentation	✓	✗	
<b>CREATING EMAIL MESSAGES / CAMPAIGNS</b>			
On-line HTML template editor & template gallery	✓	✓	
Template preview, testing & content analysis	✓	✓	
Message Branding Exclusive To Your Company	✓	⚠	
Option to use GoldMine email templates	✓	✗	

✓	Supported/ Available	✗	Not Supported / Not Available	⚠	Limited Support / Availability	Key Differentiator
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<b>TRACKING EMAIL CAMPAIGNS</b>			
CANSPAM compliance with unsubscribe & hard bounce	✓	✓	<i>Unsubscribes and hard bounce emails tracked with service provider; not flagged in GoldMine</i>
GDPR and CASL regulatory compliance options	✓	✓	<i>IntelliClick: time stamped audit trail of opt-in stored in CRM database</i>
ALL results instantly & automatically stored in CRM system	✓	✗	<i>Requires manual update</i>
Details of web pages accessed stored in CRM system	✓	✗	<i>IntelliClick stores the URL of each page visit from links in your email</i>
Track & log web site visitor navigation behavior in GoldMine	✓	✗	<i>Contact specific behavior tracked</i>
Instant alerts (email, text messaging, scheduled phone call)	✓	✗	<i>IntelliClick offers static or dynamic alerts allowing assigned reps to be notified</i>
Schedule follow up phone call activity GoldMine from click	✓	✗	
Send email with literature fulfillment attachment from click	✓	✗	<i>No web forms needed for literature requests</i>
Schedule & manage event registration in GoldMine from click	✓	⚠	<i>No web forms needed to register for events</i>
Instantly update any data fields in CRM from a click	✓	✗	<i>Allows easy data base segmentation for future campaigns and/or drip marketing using workflow automation</i>

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Feature	IntelliClick/ GoldMine	Automation Platforms	Note
<b>SENDING EMAIL CAMPAIGNS</b>			
Automatically exclude unsubscribe email addresses (CANSPAM compliance)	✓	✓	
Schedule campaign send	✓	✓	
Use external computer resources to complete send process	✗	✓	<i>IntelliSend: no data is uploaded externally; local workstation or server completes the send process</i>
No impact to GoldMine server resources to handle message send	✓	✓	
Send & track emails merged to individual contacts	✓	✗	<i>IntelliSend: able to send individual or mass tracked communication</i>
Log of actual email message sent in GoldMine history	✓	✗	
Simultaneously send to multiple database target segments on behalf of different people	✓	✗	<i>i.e. send to different sales territories on behalf of the respective sales person all at the same time</i>
Send directly against target group within GoldMine	✓	⚠	<i>Service Providers: requires manual data upload exported from GoldMine</i>
Unlimited email accounts for send on behalf of others	✓	⚠	

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<b>REPORTING / ANALYTICS</b>			
Summary & details of tracked activity by campaign	✓	✓	
Real time access to <b>report</b> analytics within GoldMine	✓	✓	
Aggregate results across multiple campaigns	✓	✓	
Real time access to <b>dashboard</b> analytics within GoldMine	✓	✗	
<b>Automated reporting by email</b>	✓	✗	
<b>PRICING / OTHER OPTIONS</b>			
Web forms to <b>convert visitors to contacts</b>	✓	✓	<i>IntelliClick: Contacts added directly to CRM</i>
User Reference Guides, Videos & Best Practice Webinars	✓	✓	<i>IntelliClick offers a regularly scheduled Coach's Corner education series</i>
Software updates and technical support	✓	✓	
<b>Private training sessions</b> included with subscription	✓	✗	
<b>No Quota For Number Of Contacts Tracked</b>	✓	✗	<i>IntelliClick: No limit to the number of contacts tracked; Service Providers: price level based upon number of contacts stored</i>
Email Send Quota (monthly)	✓	✗	<i>IntelliClick includes a quota of 10-25K per month; Additional quota is \$1 / 1,000 / mo.; Service Providers: typically have no quota</i>

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