

	ActiveCampaign	MailChimp	Constant Contact
General			
Monthly Cost	\$70/mo. for up to 25 users (500 contacts)	\$17 per month for up to 5 users (500 contacts)	\$45 per month for unlimited users (500 contacts)
Initial Setup Process	Assisted Onboarding	Moderate Self-Onboarding	Moderate Self-Onboarding
Mobile Application	Yes	Yes	Yes
User Interface	Moderate	Simple	Moderate
Template Library	Yes	Yes	Yes
Security			
Admin Access Controls	Yes	Yes	Yes
Encryption	256 Bit Encryption	256 Bit Encryption	256 Bit Encryption
2FA	Email / Text / Authenticator App	Email / Text / Authenticator App	Email / Text / Authenticator App
Marketing			
Websites / Pages	Landing Pages Only	Landing Pages and Websites	Landing Pages and Websites
Segmentation	Most Robust	Robust	Moderate
Physical Mailings	With Postalytics Integration	Postcards	No
Built-In Social Media Posting	With MeetEdgar integration	Moderate	Moderate
Message Timing	Custom Controls	Delayed Send	Custom Controls
Campaign Triggers	Robust	Robust	Moderate
Post-Send Automations	No	Yes	No
RSS Import	Yes	Yes	Yes
Reporting & Tracking			
Pipeline Tracking	Yes	Limited	Yes
Reporting Capabilities	Yes	Moderate	Moderate
Exporting Capabilities	Moderate	Robust	Robust
Searching & Filtering	Moderate	Robust	Moderate
Integrations			
CRM Integration	Built In	Wealthbox	Built In

Email Marketing Comparison

Zapier Integration	Yes	Yes	Yes
Other Integrations	JotForm, Calendly	Acuity, Calendly, JotForm	JotForm, Acuity
<u>G2 Rating</u>			
Overall	4.6/5	4.3/5	4/5
Ease of Setup	8.3/10	8.6/10	8.4/10
Ease of Use	8.5/10	8.7/10	8.4/10
Quality of Support	8.9/10	8/10	8.1/10
Summary			
Best For Firm Size	Medium-Large	Any	Any
Best Features	Robust pipeline and sales tracking features	Longevity and stability of the platform	Compliance-approved by many BDs and RIAs
	Personalized support	User-friendly interface with a strong help library	
Worst Drawbacks	The system is robust but takes some time to master as a result	No one-on-one support offered	No date-based campaigns other than anniversary
Outcome			
ActiveCampaign	ActiveCampaign is a feature-rich system designed to maximize your marketing potential. It offers granular control over the timing and content of the messages each of your contacts receives. You will have to pay for one-on-one onboarding training as it is only available on the Pro plan or higher, making this a better fit for those who are comfortable with tech or larger, more established firms.		
MailChimp	Mailchimp is one of the biggest names in email marketing and for good reason - they have developed a solid platform that is both robust and user-friendly for email marketing, social media posting, and now postcard sending. It's a great fit for those who want email functionality and don't need one-on-one support.		
Constant Contact	Constant Contact's interface is somewhat outdated and its features are limited in comparison to the other tools. With no date-based campaigns other than anniversary / birthday messaging, the primary attracting feature is that it is pre-approved by many BDs and RIAs.		

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