

# CRM Automation

Leveraging your & your employees' time

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# A word (or two) about me...last time.

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- Employee #6
- [www.infusemybusiness.com](http://www.infusemybusiness.com)
- Drawing for free 2-day consult (March 19<sup>th</sup>)
- <http://twitter.com/bardley>
- <http://facebook.com/iambardley>
- <http://linkedin.com/in/bardley>
- Uhh, what'd you say?

Umm, what is  
CRM Automation?

# Features we're going to talk about

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- Tasks in Follow-Up Sequences
- Task Completion Scenarios
- Note Templates
- Filling out web forms in Infusionsoft



Let's go to Infusionsoft.

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