

# Infusionsoft 202: Identifying Your System of Automation

Presented By: Dave Lee

**1**

## **Send Your First Broadcast (2.0 Style)**

Discover Automation Links

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**2**

## **Fix Your Follow-up ("*The Key Three*")**

New Lead Campaign

Long-Term Nurture Campaign

New Customer Campaign

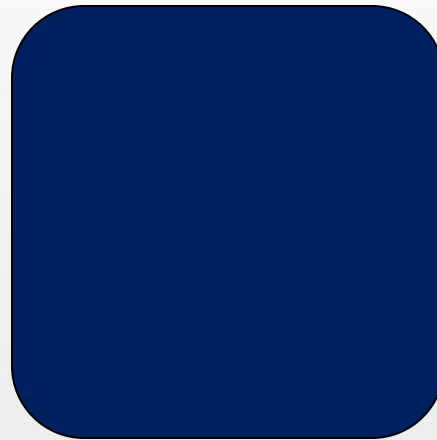
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**3**

## **Automate and Grow**

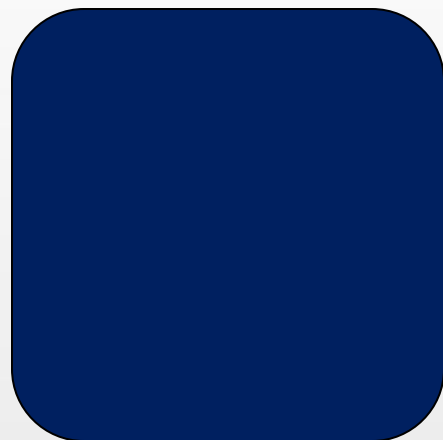
Apply the 9 Building Blocks to Infuse Your Entire Business

## I Sell Color



Blue

## My Blue “Funnel”



Blue

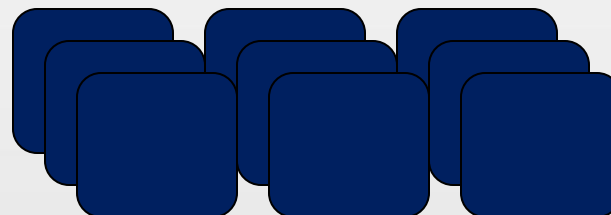
Leads



New Customers



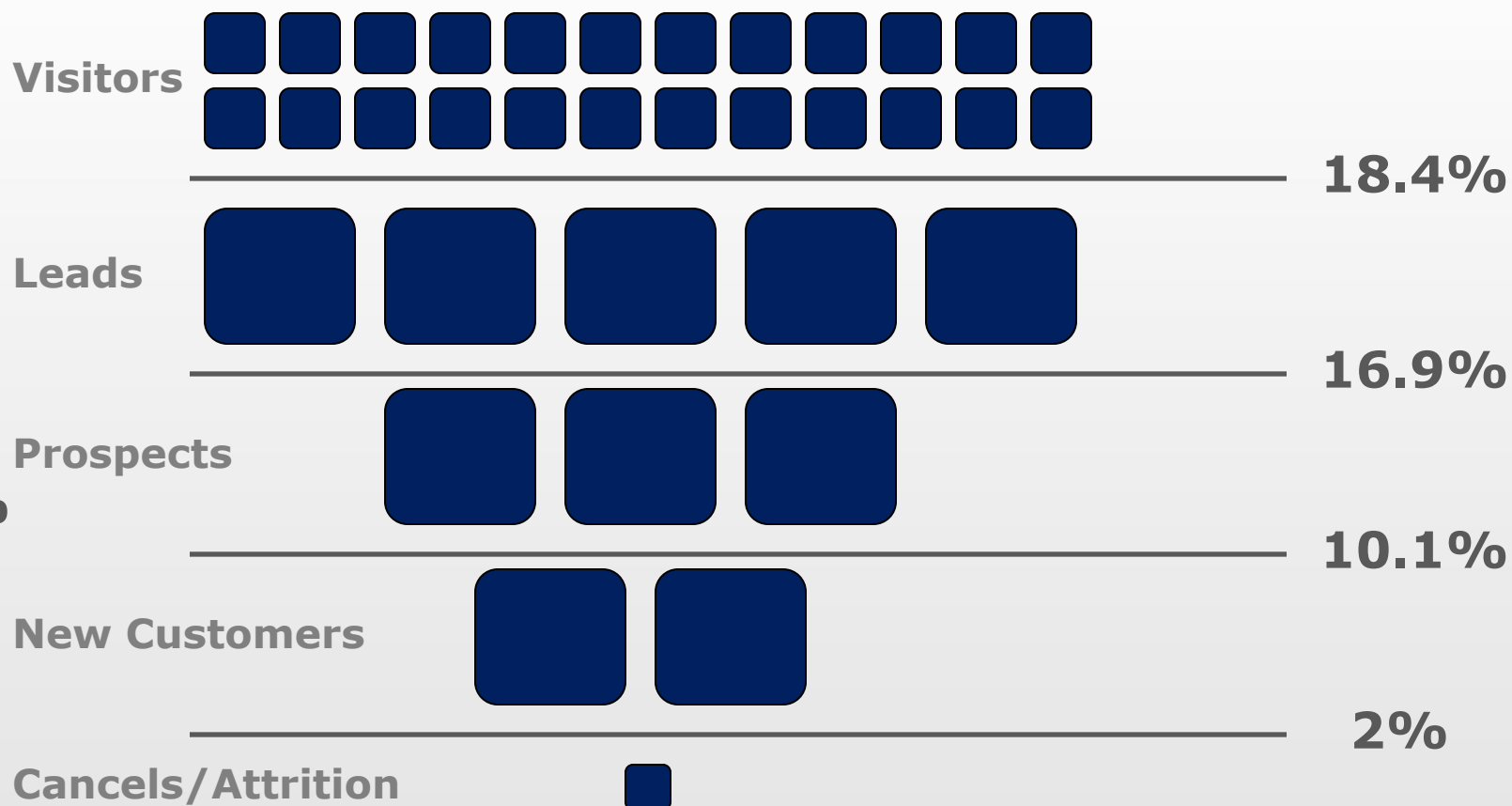
Past Customers





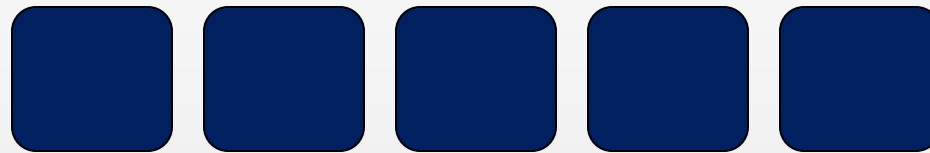
## My Blue Funnel “Metrics”

### Conversion Metrics



## Funnel Problems

Leads



## Funnel Problems

Lead Sources



Leads



Lead Type &  
Demographics

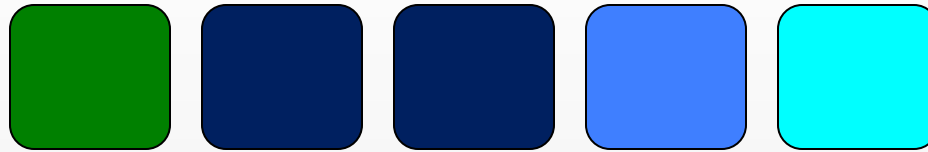


Preferences &  
Behaviors

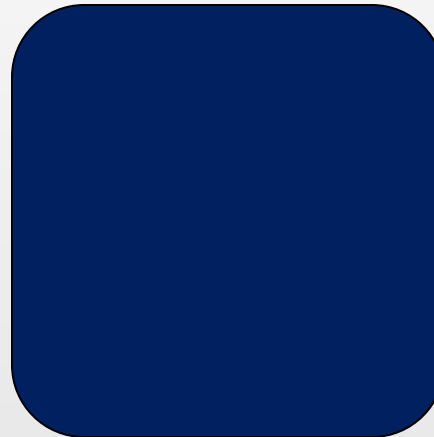


## Funnel Problems

Preferences &  
Behaviors



I'm Selling Them



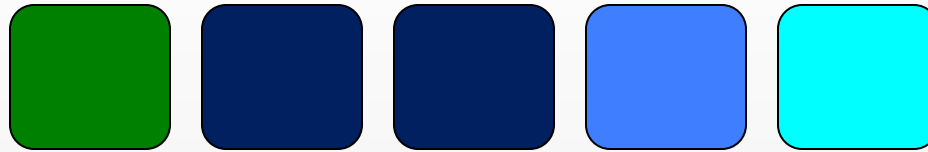
Blue





## Funnel Opportunities

Preferences &  
Behaviors



I COULD  
Sell Them

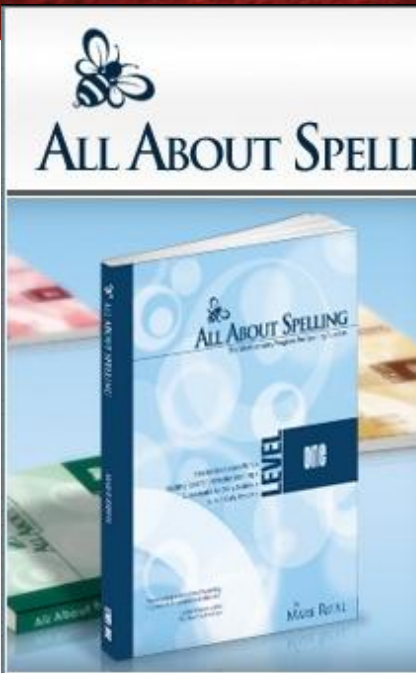


## New Leads – Peeling Back The Covers

Tailor which “new lead campaign” based on:

- **Lead source**
  - Purchased lead
  - Online
  - Offline
  - Partner/affiliate
  - Referral
- **Lead “type”**
  - Personality
  - Demographics
  - Size, income, revenue
- **Interests & Preferences**
  - Stated or selected wants and needs

## Examples



### Free Report!

"20 Best Tips for Teaching Spelling"

First Name:

Last Name:

Email:

- ☐ Homeschool Teacher  
☐ Classroom Teacher  
☐ Other

☒ Send free weekly spelling tips, too!

Send My Report!

## Free Report!

"20 Best Tips for Teaching Spelling"



First Name:

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- ☐ Homeschool Teacher  
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☒ Send free weekly spelling tips, too!

Send My Report!

with how to teach spelling.



## BEST DETAIL SHOP


[HOME](#)
[STORE](#)
[FREE HAND  
CARWASH](#)
[ABOUT US](#)
[TESTIMONIALS](#)

### WELCOME

Welcome to BestDetailShop.com: a discount V.I.P Auto Appearance Auto Alarm site. The primary purpose of this site is to pass on savings to customers. The column to your right showcases our featured products and offers. These featured products will change often and may feature deals available for 24 hours. So, please, check back often. We love to hear from **Contact us** and let us know what you think about the web site.



### Join The V.I.P Auto Mailing List

\*Name:

\*E-mail:

Phone  
Number:

Check the product boxes below to receive Irresistible Introductory Offers For 1st Time Customers!:

- |   |   |
|---|---|
| <input type="checkbox"/> Auto Detailing       | <input type="checkbox"/> Window Tinting |
| <input type="checkbox"/> Alarm/Remote Starter | <input type="checkbox"/> Wheel Repair   |
| <input type="checkbox"/> Door Ding Repair     |   |



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| <input type="checkbox"/> Door Ding Repair     |   |

\* - Required Field

[Click Here To Send](#)



Step 1: Your Personal Style > Step 2: Your Measurements > Step 3: Your Fit Preferences

## PLEASE TELL US ABOUT YOUR STYLE PREFERENCES

I like to dress in the following styles (check all that apply):



SEE MORE ▶

☐ Romantic



SEE MORE ▶

☐ Glamorous



SEE MORE ▶

☐ Artistic



SEE MORE ▶

☐ Classic



SEE MORE ▶

☐ Trendy



SEE MORE ▶

☐ Modern

## YOUR DRESSING PREFERENCES

My style variety is: ☐ Consistent (creature of habit) ☐ Eclectic ☐ Unpredictable (living on the edge)

My style risk level is: ☐ Safe (who needs attention) ☐ Variable ☐ Daring (alert the paparazzi)

Do you like to wear necklines that show your cleavage? ☐ No ☐ Just a peek ☐ Yes

Year of Birth:  I like to dress like I am in my (check all that apply): ☐ Teens ☐ 20s ☐ 30s ☐ 40s ☐ 50s ☐ 60s ☐ 70+

## YOUR SHOPPING PREFERENCES

I typically spend for an outfit (pants / skirt, top and sweater / jacket - not including shoes and accessories):

Please Select ▼

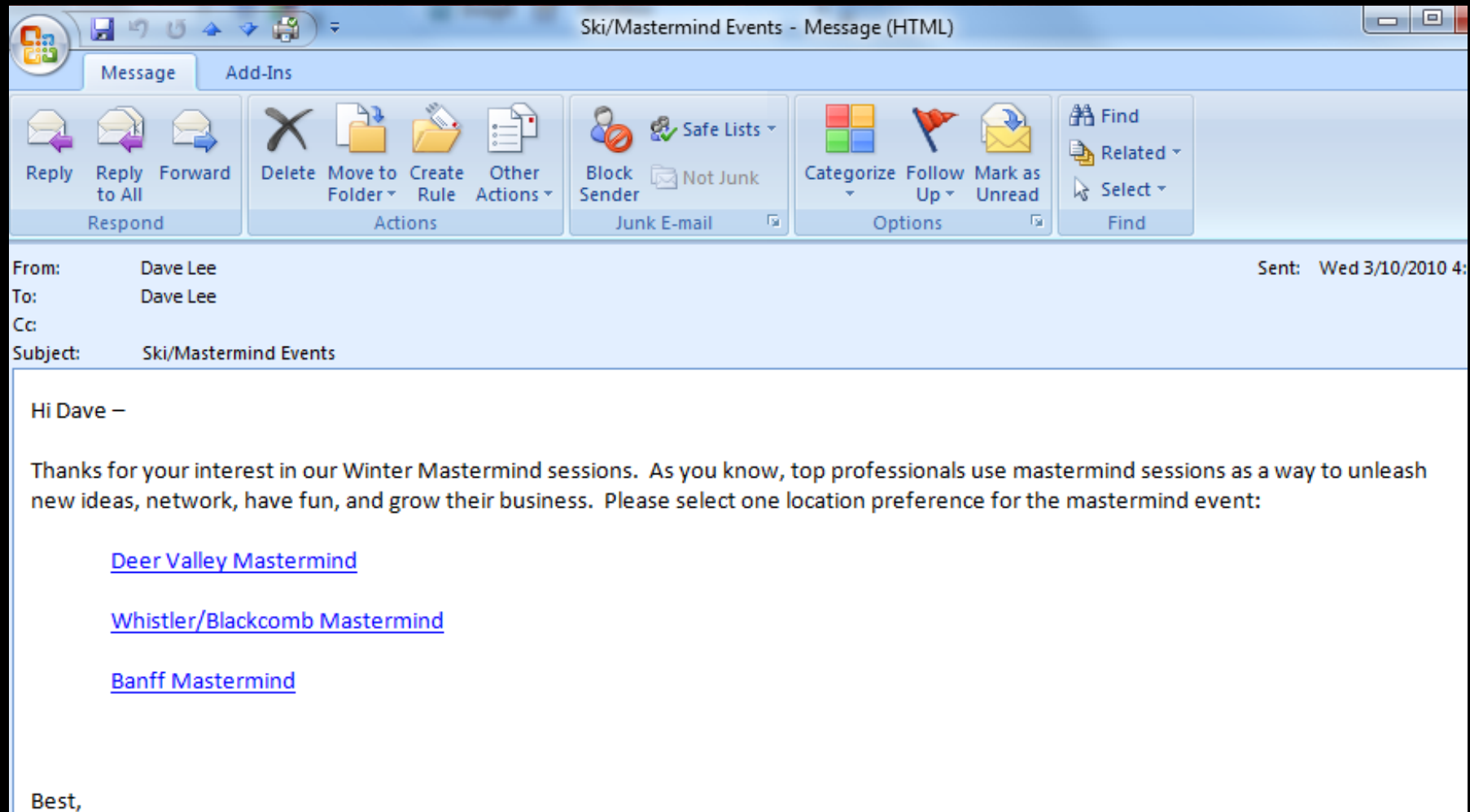
I buy and wear the following brands and designers (check all that apply):

☐ Ann Taylor

☐ Anthropologie

☐ BCBG

☐ Banana Republic



## Rinse & Repeat...

The same concepts should be applied to your:

- **New customers**
- **Long-term follow-up with customers**
- **Collections**
- **Partners/affiliates**
- **Employees (training)**

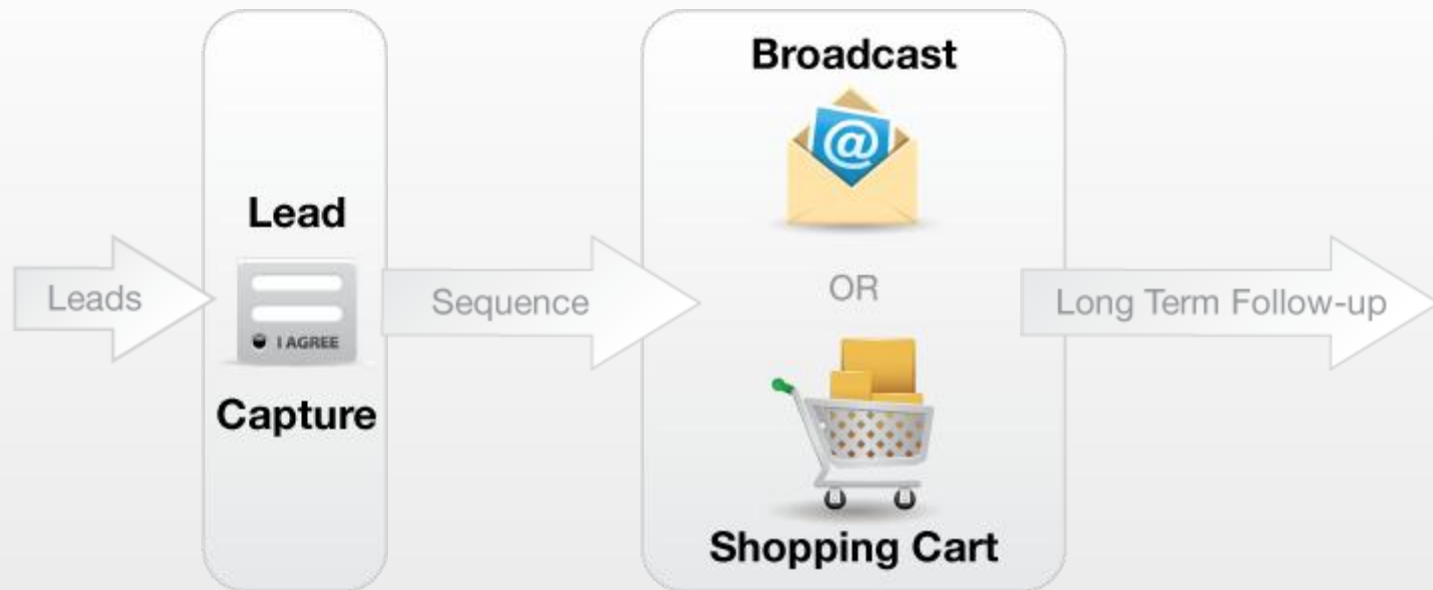
## What's Your Flow?

- How do you 'handle' new leads, customers, partners, etc.?
- What does it look like if you made a picture?
- How would you diagram it?

**Let's See Some Examples...**



## Simple Flow

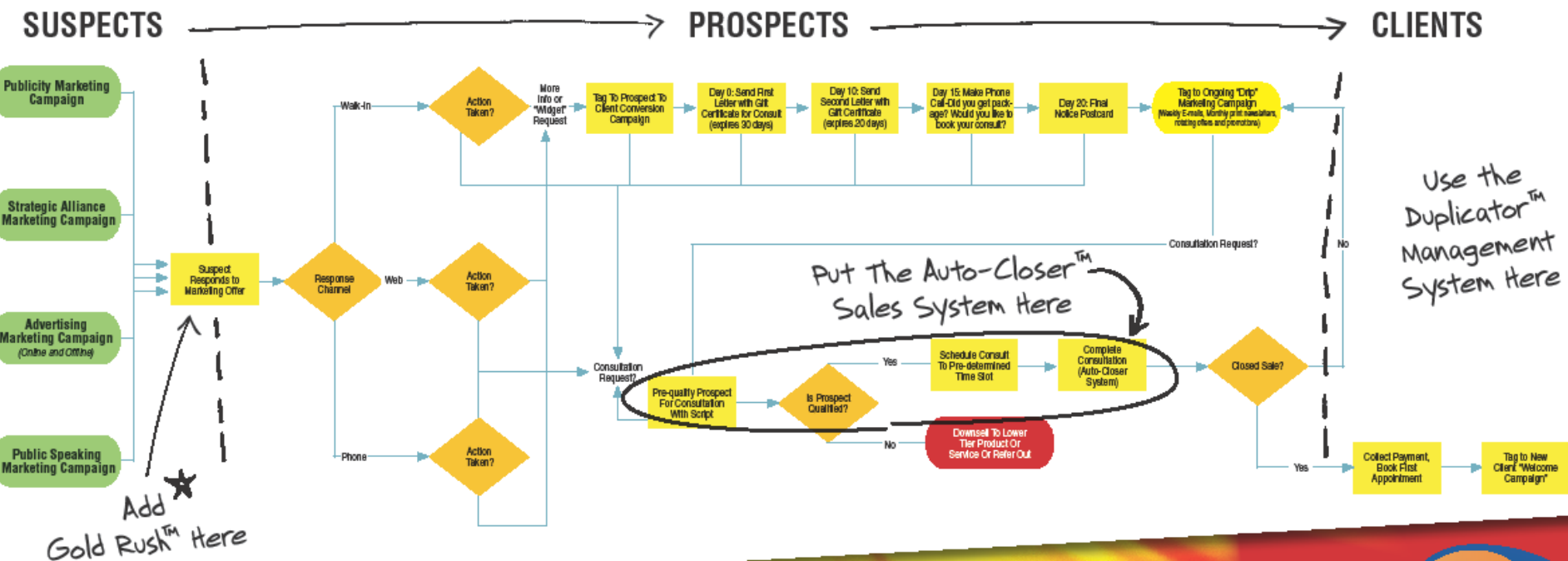




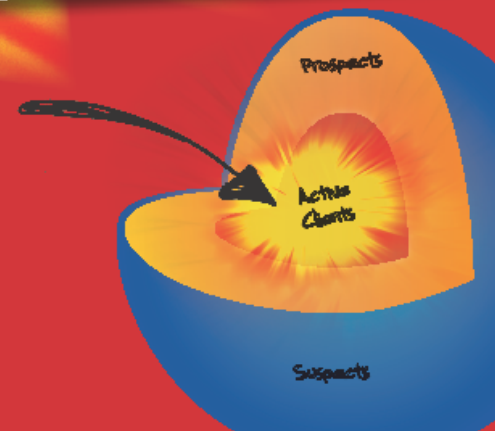
## Advanced Flow



## PROCESS MAP



**DEEP CORE™**  
FITNESS MARKETING SYSTEM

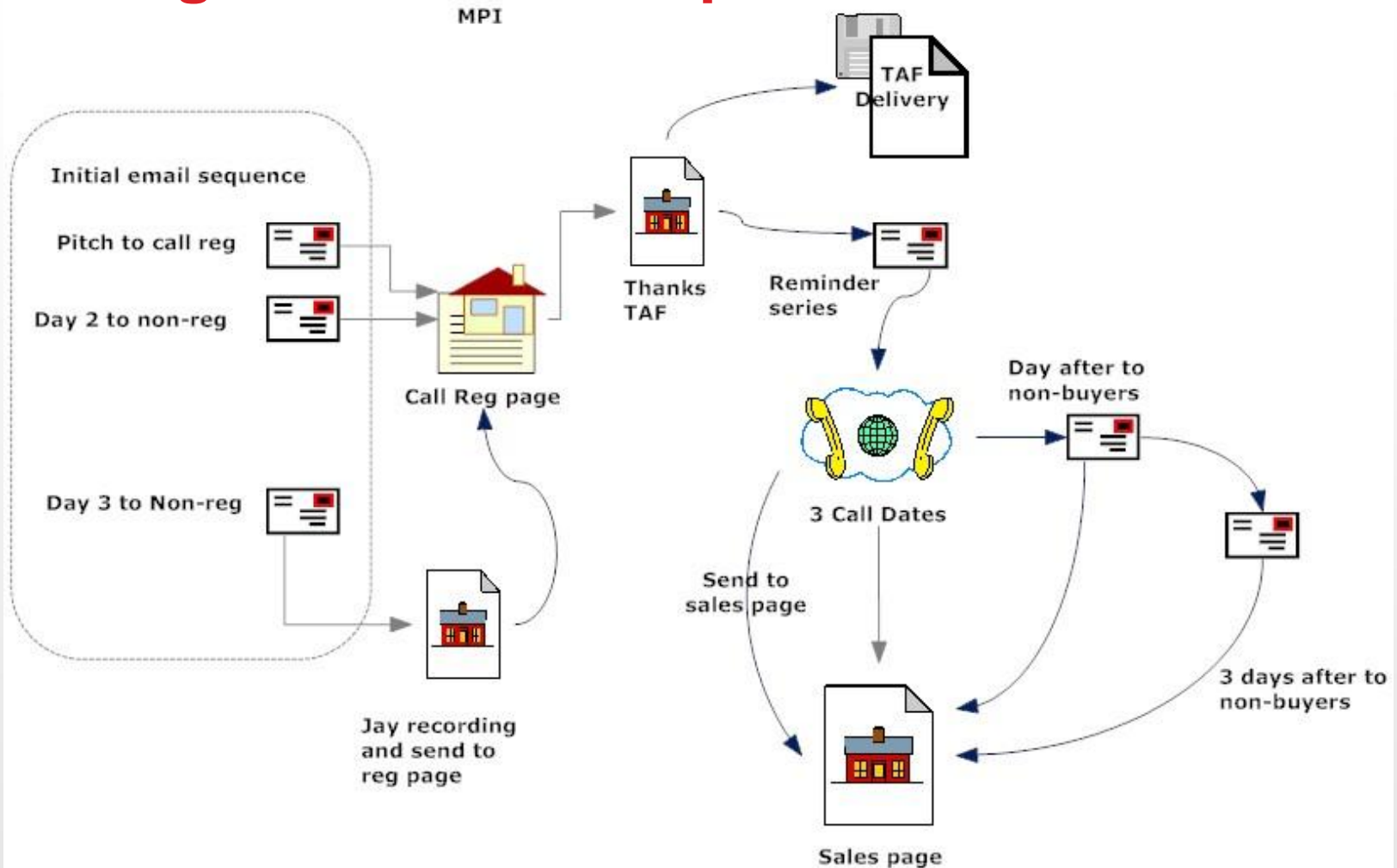


Directions: Follow the Deep Core™ Fitness Marketing System Process Map to flood your fitness business with red hot leads every single month and hit 'critical mass' at warp speed!

1.888.866.4998

www.NetProfitExplosion.com

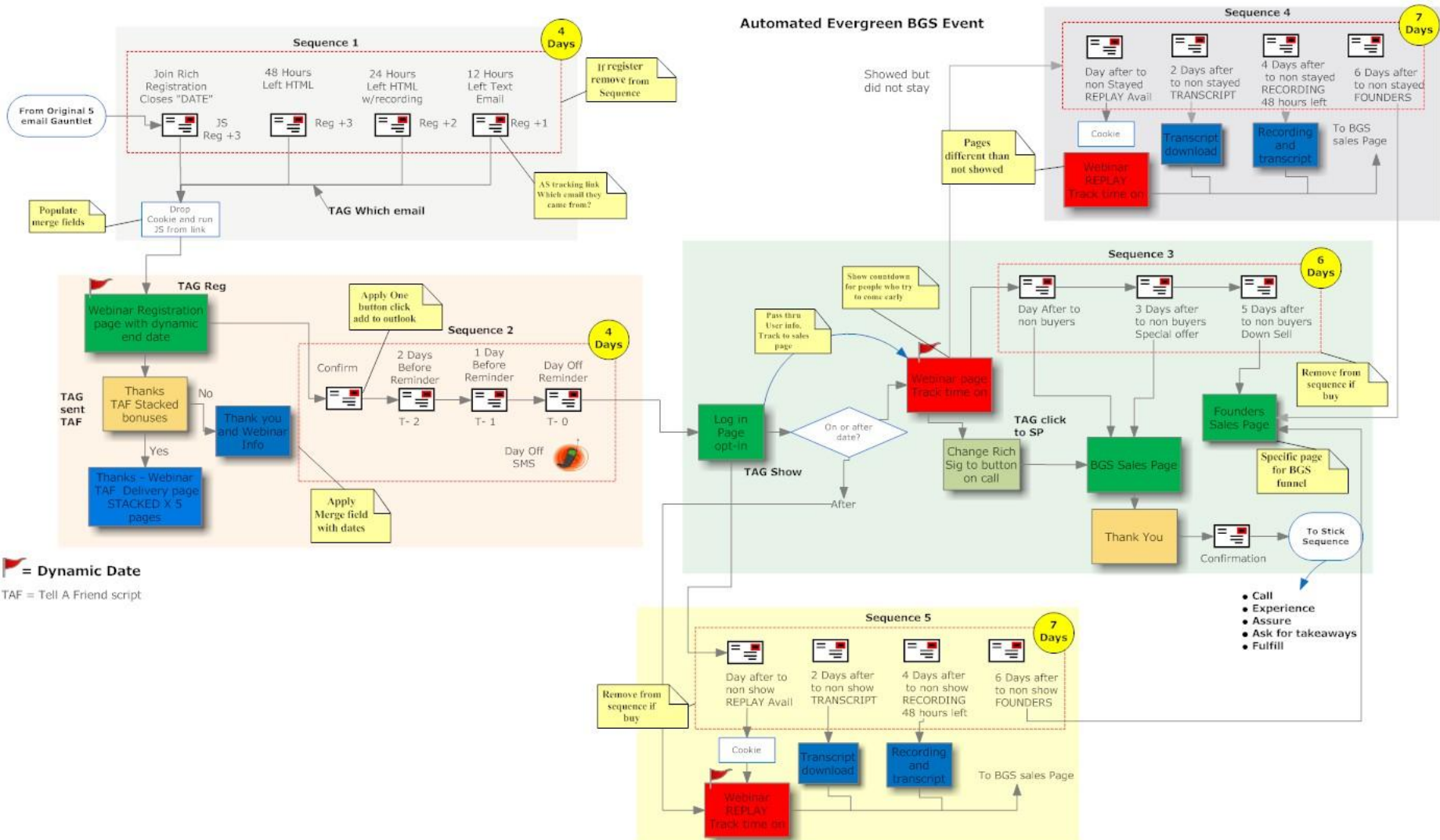
# Strategic Profits: Example 1



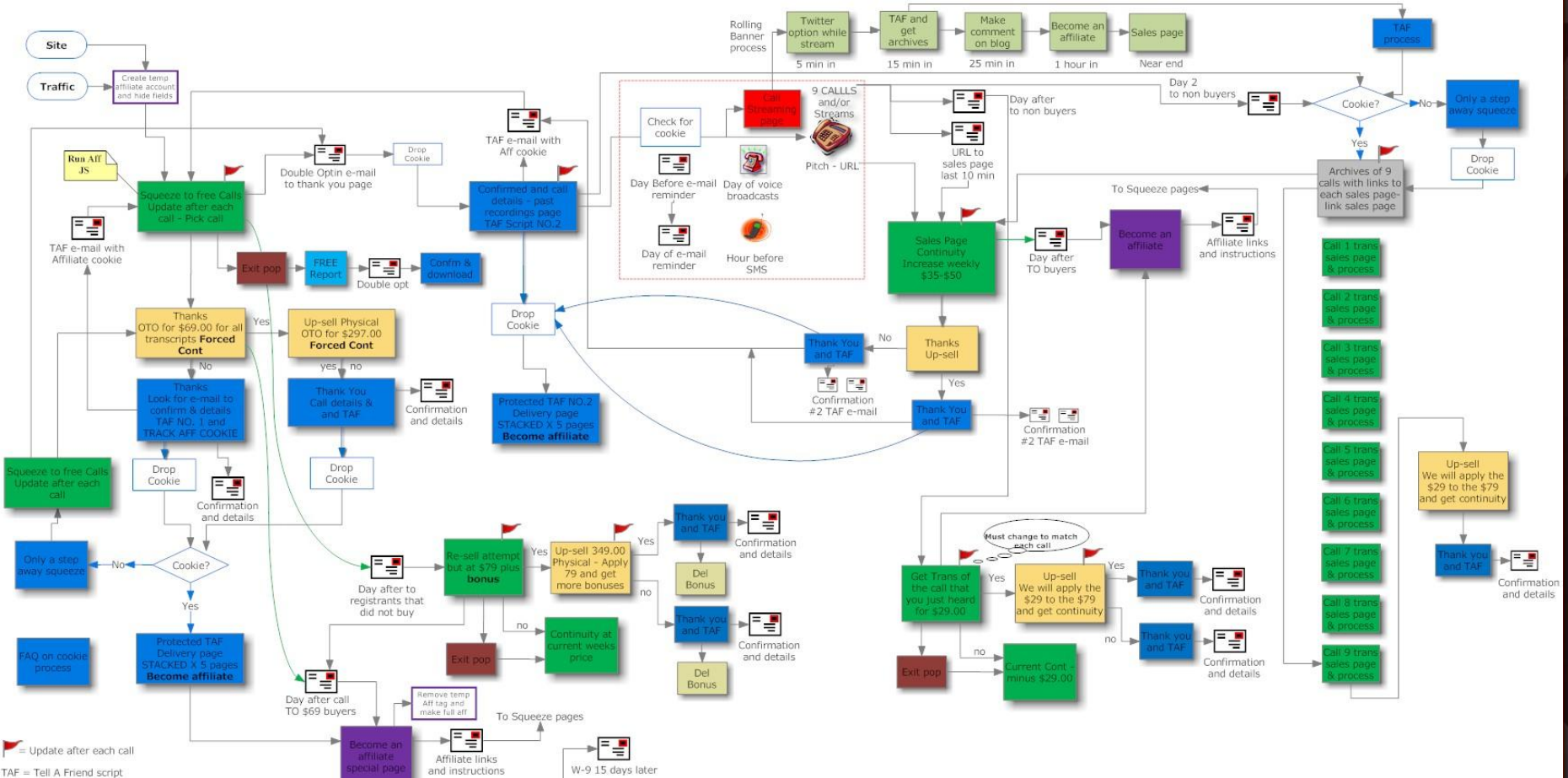
\$1496.00 full pay  
-or-  
6 months at \$315.00



## Strategic Profits: Example 2



## Strategic Profits: Example 3





## Exercise

## Identify Your “Ideal Customer”

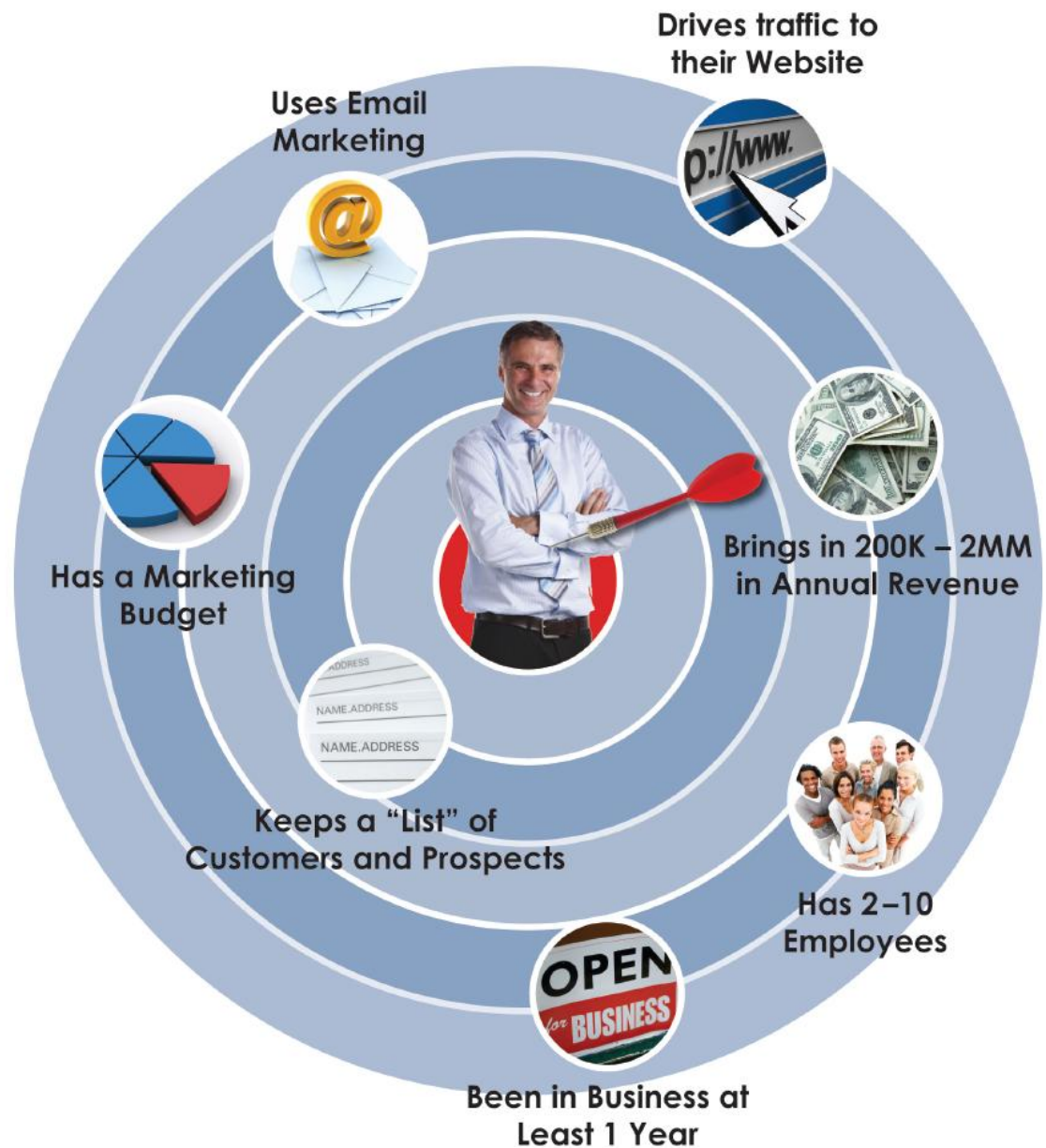
Until you define what your ideal customer is, you will continue to receive mediocre results.

- Demographics
- Behaviors
- Revenue/Income
- Goals
- Spend
- Events

## How To Identify Your Ideal Customer

- **Commit yourself to do it!**
- **Study your database**
- **Survey your customers**
- **Interview your customers**
- **Document**
- **Communicate**

# Infusionsoft's Ideal Customer

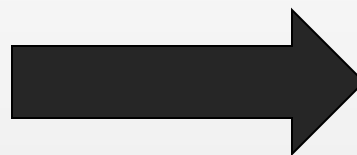


## Infusionsoft's "Funnel"



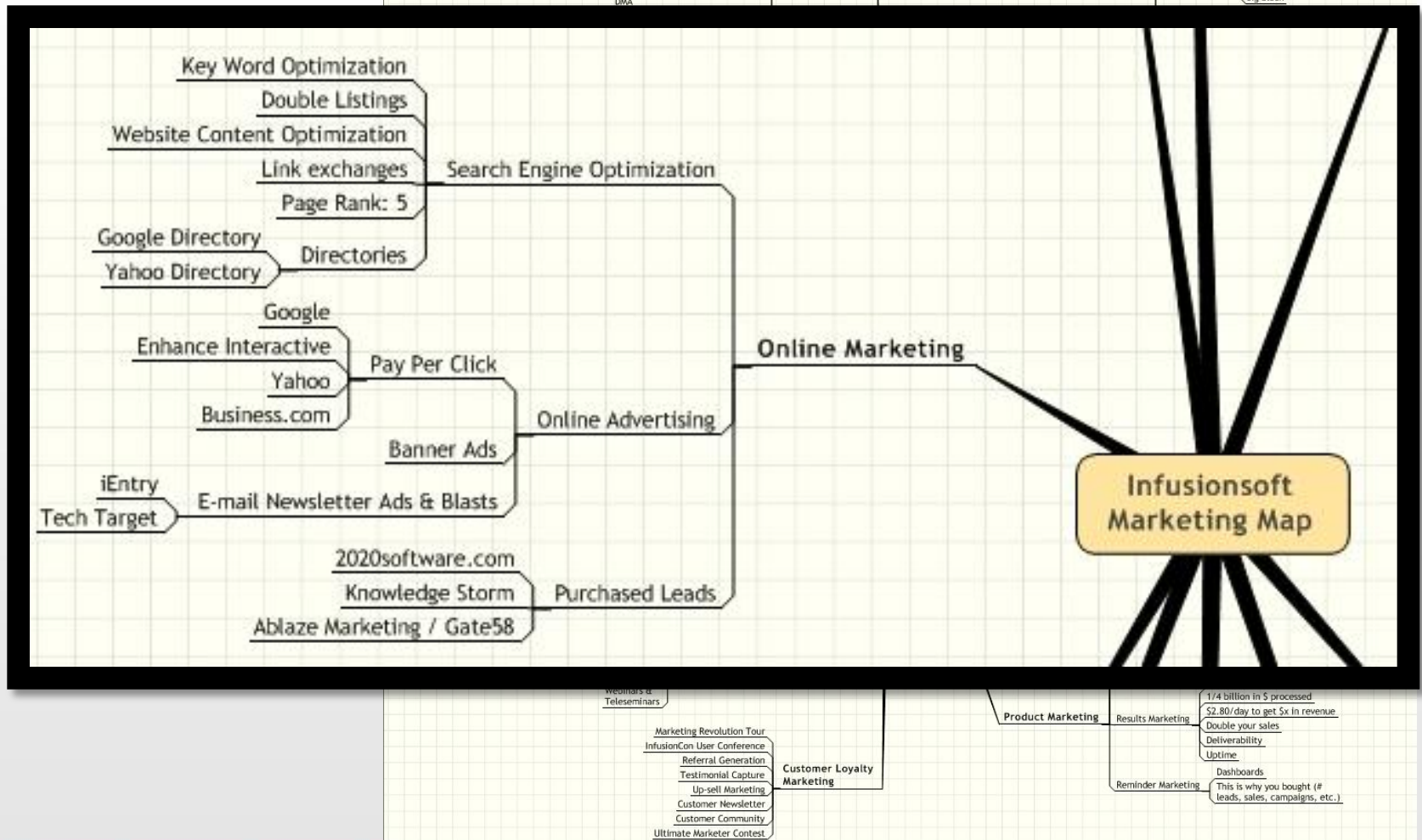
## “Above” The Funnel

- **Online Marketing**
  - Organic
  - PPC
  - Banner Ads
  - Email Newsletters
- **Purchased Leads**
- **Offline Marketing**
  - Events
  - Direct Mail
- **Public Relations**
- **Social Media**



**Leads**  
(Suspects)

## Mindmap



# LeadLander

## LeadLander Daily Report

**TODAY'S TIP:** To show only visitors from specific U.S. states, [login to LeadLander](#) and click "Account".

Pageviews	Company	Most Recent Visit	Search Terms
41	<a href="#">NELEVEN</a> Oshkosh, WI, United States	3/8/2010 2:28:13 PM	infusion soft
29	<a href="#">Tonyland Produce</a> Weatherford, TX, United States	3/8/2010 1:07:37 PM	
28	<a href="#">Vodacom (Pty)</a> Johannesburg, South Africa	3/8/2010 7:51:54 AM	
21	<a href="#">Consumer Contact Limited</a> Toronto, ON, Canada	3/8/2010 10:35:11 AM	
19	<a href="#">Cape Town</a> Johannesburg, South Africa	3/8/2010 8:40:46 AM	
18	<a href="#">INTERNATIONAL ACADEMY OF HAIR</a> Ormond Beach, FL, United States	3/8/2010 11:47:23 AM	
15	<a href="#">Lason</a> Chennai, India	3/8/2010 8:59:12 PM	
15	<a href="#">AS ASISTENT d.o.o.</a> Ljubljana, Slovenia	3/8/2010 4:38:11 AM	infusionsoft affiliate
14	<a href="#">Telmex Colombia S.A.</a> Bogot, Colombia	3/8/2010 12:35:39 PM	
12	<a href="#">Petroleos Mexicanos PEMEX</a> Mexico	3/8/2010 7:05:21 AM	
11	<a href="#">ARRANGING-PIXELS</a> Orlando, FL, United States	3/8/2010 6:38:52 AM	
10	<a href="#">AMOCO</a> United Kingdom	3/8/2010 8:50:57 AM	infusionsoft
9	<a href="#">Protronics Technologies</a> Chesterfield, MO, United States	3/8/2010 3:35:50 PM	

## Middle of the Funnel Focus

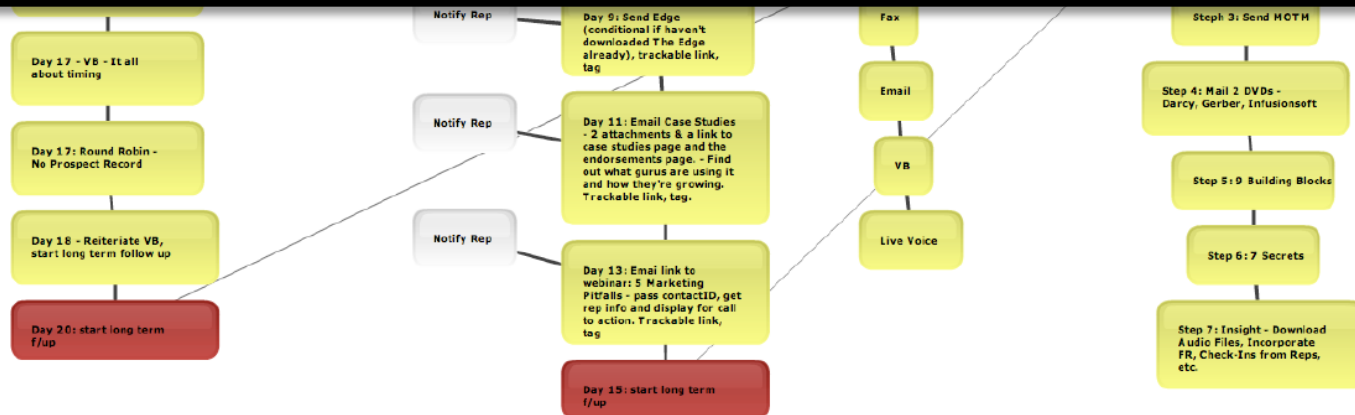
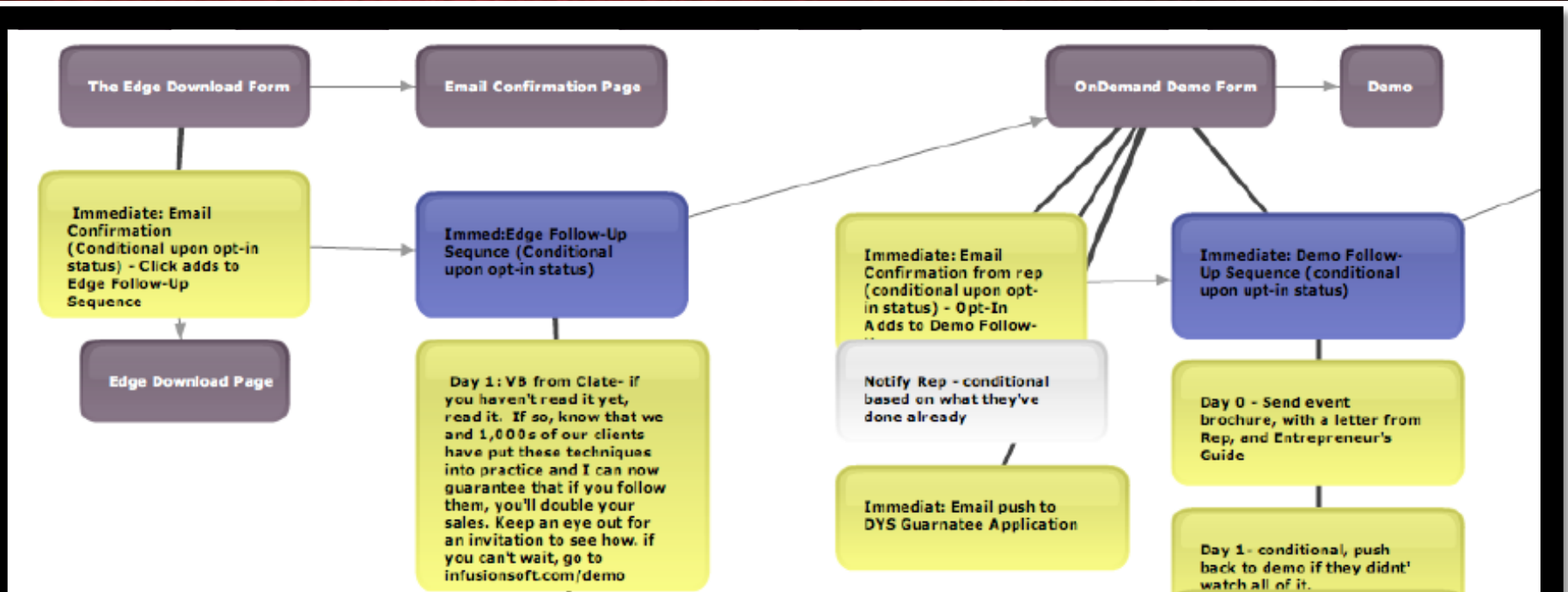
- Automatic Follow-up
- Qualify
- Educate
  - Demo
  - Webinars
  - Teleseminars
  - Live Events

**Suspects**



**Prospects**





## Bottom of the Funnel Focus

- Sales Reps
- Disqualify
- SFA
- Consultations
- Webinars

**Prospects**



**Buyers**

# Tracking Your Entire Funnel

Last 7 Days			Last 30 Days		
<b>18,945 Visits</b>	▼		<b>114,773 Visits</b>	▲	
Previous: 26,394 (-28.22%)			Previous: 103,809 (+10.56%)		
<b>2.19 Pages/Visit</b>	▲		<b>2.16 Pages/Visit</b>	▼	
Previous: 2.10 (+4.32%)			Previous: 2.22 (-2.90%)		
<b>66.81% % New Visits</b>	▼		<b>71.30% % New Visits</b>	▲	
Previous: 73.09% (-8.59%)			Previous: 68.04% (+4.79%)		
<b>58.23% Bounce Rate</b>	▲		<b>56.73% Bounce Rate</b>	▼	
Previous: 57.51% (+1.26%)			Previous: 58.09% (-2.34%)		
<b>00:02:33 Avg. Time on Site</b>	▲		<b>00:02:28 Avg. Time on Site</b>	▼	
Previous: 00:02:14 (+13.72%)			Previous: 00:02:40 (-7.43%)		
<b>2,152 Organic Search Traff.</b>	▲		<b>10,265 Organic Search Traff.</b>	▼	
Previous: 1,970 (+9.24%)			Previous: 11,188 (-8.25%)		
<b>1,872 Brand Searches</b>	▲		<b>9,004 Brand Searches</b>	▼	
Previous: 1,699 (+10.18%)			Previous: 9,877 (-8.84%)		

Source	Medium	Visits	Pages/Visit	Bounce Rate	Time OnSite
(direct)	(none)	50,831	2.15	56.56%	00:02:19
google	organic	9,408	3.09	45.37%	00:05:35
mail.google.com	referral	8,880	1.95	51.12%	00:02:00
facebook.com	referral	3,475	1.54	76.20%	00:01:04
google	cpc	2,460	2.74	33.25%	00:03:24
apps.facebook.com	referral	1,853	1.20	86.89%	00:00:30
ad.doubleclick.net	referral	1,344	1.49	68.45%	00:00:41
smallbiznm.com	referral	1,284	3.07	40.03%	00:02:55
yahoo	cpc	1,151	1.57	85.06%	00:00:51
us.mgt2.mail.yahoo.com	referral	1,124	2.00	52.94%	00:02:19
inc.com	referral	913	1.80	66.16%	00:01:32
startupnation.com	referral	823	2.31	54.80%	00:02:38
us.mgt4.mail.yahoo.com	referral	792	1.87	58.71%	00:01:58
smallbusinessvault.com	referral	668	1.97	68.46%	00:02:55
webpronews.com	referral	610	1.72	71.64%	00:01:48
freemacware.com	referral	575	1.23	87.30%	00:00:29

Keyword	Medium	Visits	Pages/Visit	Bounce Rate	Time OnSite
infusionsoft	organic	4,688	3.15	38.14%	00:03:43
infusion soft	organic	973	3.11	39.77%	00:04:02
infusionsoft.com	organic	654	2.97	45.72%	00:04:03
infusion software	organic	290	3.11	41.72%	00:03:18
autoresponder	cpc	160	1.17	88.75%	00:00:34
infusionsoft crm	organic	151	2.05	74.17%	00:01:32
infusionsoft beat the recession kit	organic	143	12.22	27.27%	02:20:21
infusion	organic	142	3.16	45.07%	00:03:21
email blaster program	cpc	141	1.11	93.62%	00:00:24
email marketing software	cpc	106	1.01	99.07%	00:00:00
infusion	cpc	100	1.88	74.00%	00:01:49
www.infusionsoft.com	organic	68	3.56	36.76%	00:05:02
mail program	cpc	59	1.03	98.31%	00:00:00
infusionsoft support	organic	58	2.29	48.26%	00:02:15
blast email	cpc	45	1.09	93.33%	00:00:13
infusionsoft fusebox	organic	45	1.80	75.56%	00:01:58

Results Updated 2009-12-04T14:18:19.552-08:00

## MTD Sales Funnel

4th of 31 days  
**December**  
12.9% of the way through month

Site Visitors  
**11,309**  
9.4% of goal: 120,000



Suspects  
**1,880**  
8.3% of goal: 22,858



Prospects  
**548**  
10.4% of goal: 5,250



New Units  
**51**  
11.3% of goal: 450  
FT Upgrades: 28, Stoppers: 2  
Doesn't exclude failed CC.  
2.7% sus. to unit conv. rate

Demos  
**481**  
12.0% of goal: 4,000

Free Trials  
**47**  
8.5% of goal: 550

Total Prospects  
**722**  
All prospects created this month  
including internationals, bad contact  
info, and closed/lost

# Tracking Your Entire Funnel

## Last 7 Days

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Previous: 26,394 (-28.22%)

**2.19 Pages/Visit**

Previous: 2.10 (+4.32%)

**66.81% % New Visits**

Previous: 73.09% (-8.59%)

**58.23% Bounce Rate**

Previous: 57.51% (+1.26%)

**00:02:33 Avg. Time on Site**

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**2,152 Organic Search Traff.**

Previous: 1,970 (+9.24%)

**1,872 Brand Searches**

Previous: 1,699 (+10.18%)



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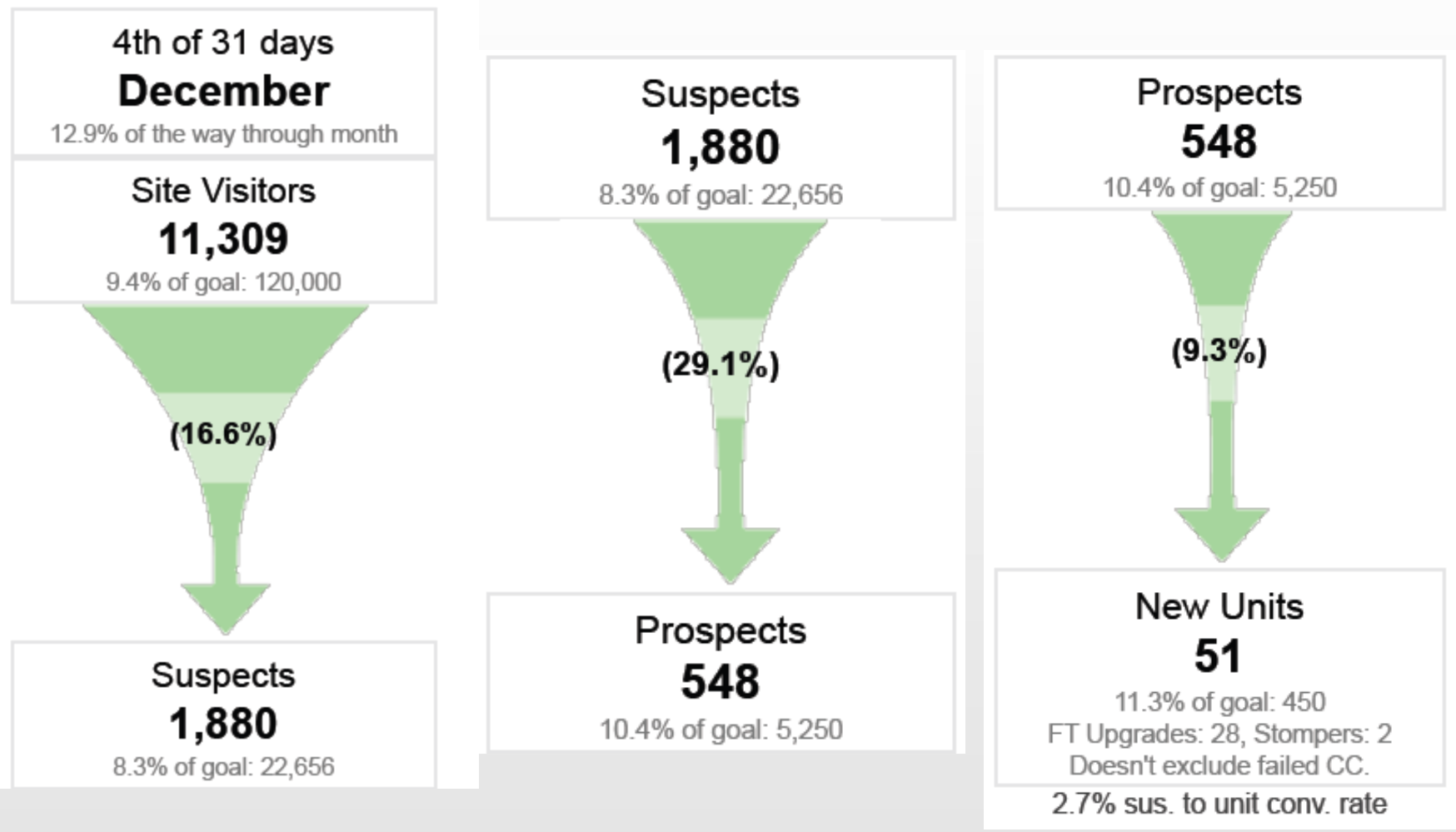
Previous: 9,877 (-8.84%)





# Tracking Your Entire Funnel

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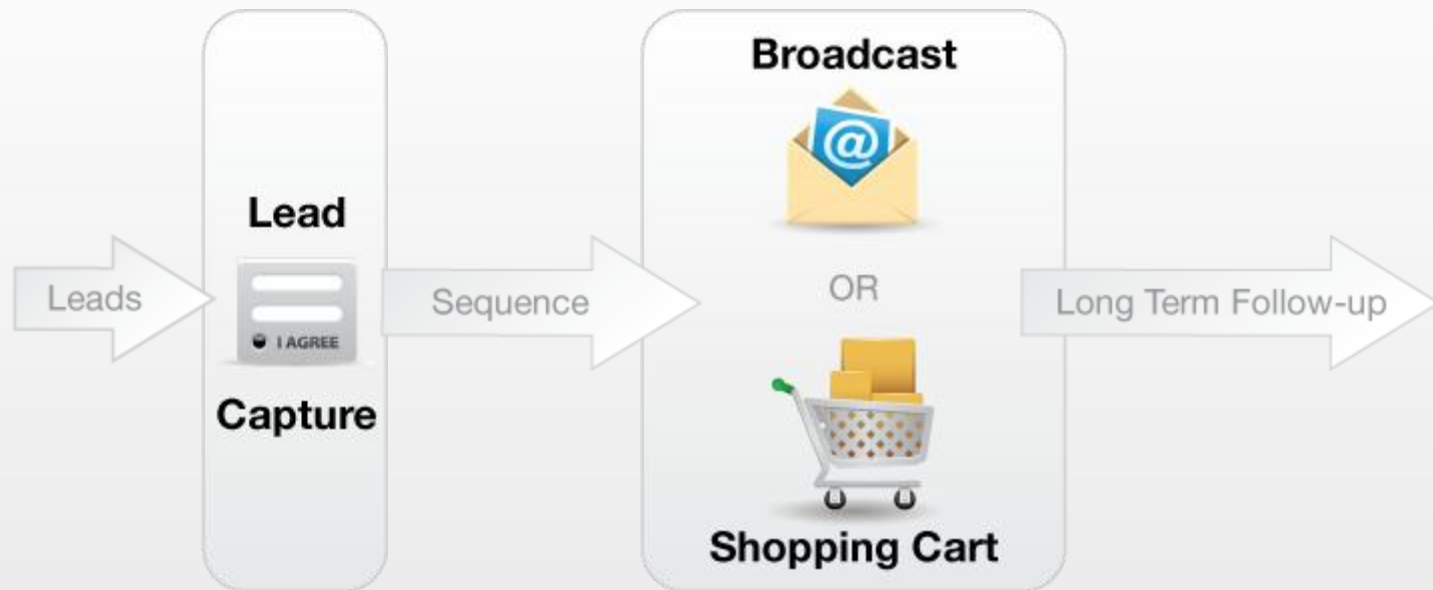


## Tracking Your Entire Funnel



## What is YOUR System of Automation?

## Simple Funnel





## Advanced Funnel



# The Sales Maximizer

## The Four Ways to Increase Sales



# **The Sales Maximizer**

The Four Ways to Increase Sales

## **Done-For-You Services**

- 1** Generate more qualified buyers through better segmentation, additional follow-up sequences, automation links, and action sets.
- 2** Increase average revenue per sale through shopping cart setup, up-sells, cross-sells, order forms, completion triggers, & action sets.
- 3** Get repeat buyers through long-term nurture sequences, specific promotion templates, and more.
- 4** Grow through referrals from affiliates with an affiliate sign-up form, affiliate commission structure setup, resource center configuration, and affiliate redirect links.